TULANE UNIVERSITY



WaveWorks!

Candex

User Guide

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Candex

Candex is Tulane's new punchout to process for student, speaker and guest reimbursements. This is **not** for vendors, faculty and staff payments, or faculty and staff reimbursements.

Staff and Faculty who are also students should submit reimbursement requests through the expense module.

Who can be paid with Candex?

Alumni- business entertainment, conference fees, travel reimbursements- both domestic and foreign, recruitment expenses.

Guest Artists- examples are musicians, dancers, or actors. Any guest artist who signs a contract is a vendor and should be set up as a supplier and paid through the non-catalog requisition/PO process.

Guests- business entertainment, conference fees, travel reimbursements- both domestic and foreign, recruitment expenses.

Honorariums- remember that Tulane employees are not eligible for honorariums. Please use the Honorarium Engagement Agreement.

One-Time NSR Stipends- these are for non-Tulane students or one time NSR payments to Tulane students. Tulane students receiving multiple payments in a semester should follow the process through Financial Aid and Student Accounts.

Participant Support- This is for support given to study participants- examples could be paying a participant's Entergy bill or transportation to the study.

Speakers- like guest artists. If speaker signs a contract, they should be set up as a supplier and paid through the non-catalog requisition/PO process.

Students- business entertainment, conference fees, travel reimbursements- both domestic and foreign, recruitment expenses, academic prizes and awards (including travel or summer grants), and reimbursement for books, publications, subscriptions or supplies/operating expenses.

Study Participants- payment directly to the participant for participation in the study.

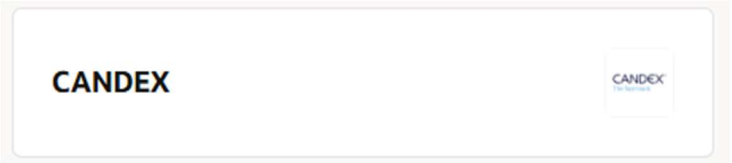
Trainees- misc. expenses, stipends or travel

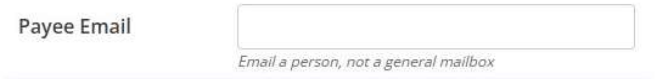
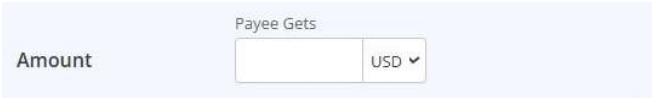
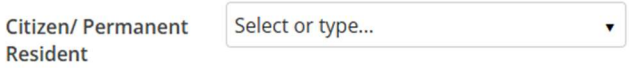
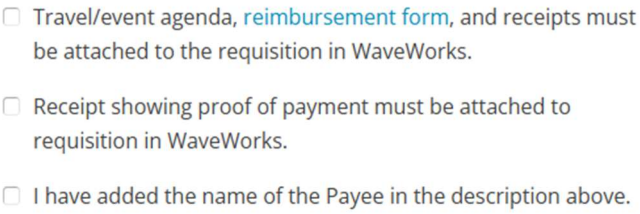
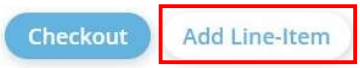
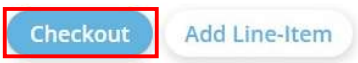
What is the process to use Candex?

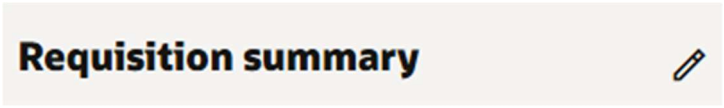
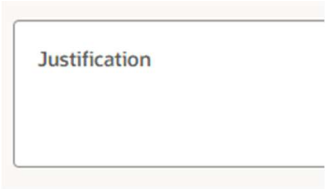
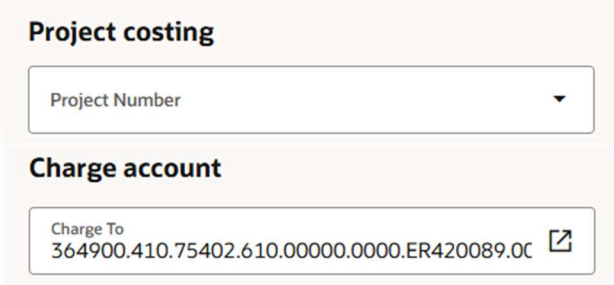
1. Notify the payee that they will be paid through Candex (see stock letter).
2. Set up the payment through the punchout located in Procurement.
3. Allocate, attach all supporting documents as **one** pdf, and submit the requisition.
4. Once all approvals are obtained, the requisition will become a PO.
5. The PO is sent to Candex.
6. Candex will reach out to the payee.
7. The payee will create an account with Candex and add their billing details (Tulane employees no longer need to obtain contact information nor W9 forms for these payments).
8. Candex will invoice Tulane.
9. Tulane will pay Candex.
10. Candex will pay the payee.

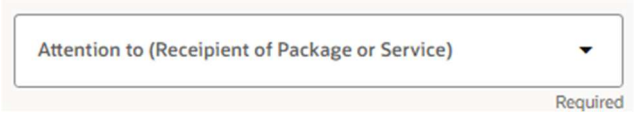
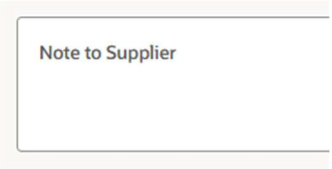
TIP Do not process more than 3 recipients on one requisition/cart to streamline approval. Delayed approvals may take up to 14 business days.

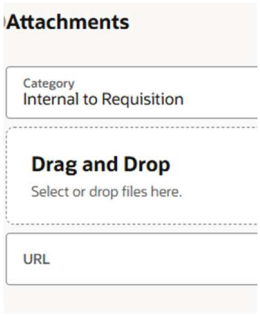
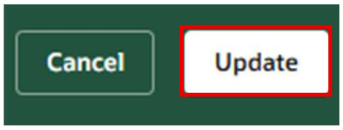
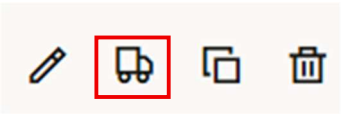
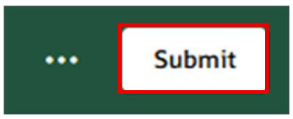
How to process a payment

From WaveWorks go to the Procurement tab.	
Click on	
Click on Candex.	
Choose a Category.	

Enter a Description.	 The description should include the payee name, email address, and student status (faculty and staff who are also students should **not** be reimbursed here)
Enter the payee email.	 A Tulane email is acceptable for students
Enter the payment amount.	
Enter an Event Date, if applicable.	
Choose the Status.	
Check any applicable boxes and make sure to follow those directions.	 These attestations may change depending on category Attachments are done in WaveWorks not here in Candex
Add Additional Line Items.	 Each expense category requires a line (example the total travel reimbursement can be one amount in that category) Do not break out by individual expense i.e. do not add each meal or uber
Checkout.	

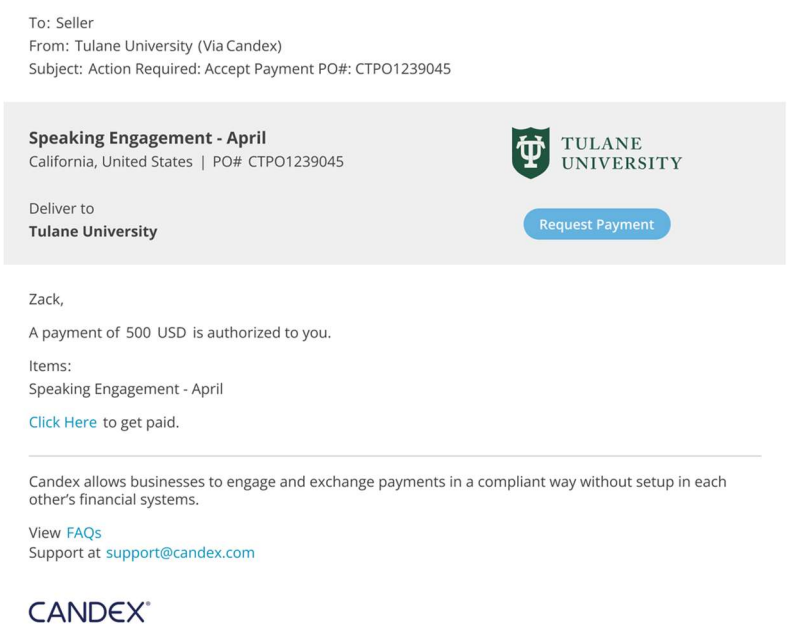
Click on the pencil next to the Requisition Summary	
Enter a brief description.	 Category descriptions- reimbursement, honorarium, award, or one-time payment
Add a Justification if applicable.	 These comments are just for Tulane approvers
Update the Deliver-to-Location if needed.	 This field needs to match the delivery address in the Additional Information
Enter either the GL, Non-Sponsored, or Sponsored Project in the **appropriate** field.	 **Only use the Charge Account if the account starts with GL** If using a Sponsored Project, make sure to add the RASU details on the line item See the How to Check Out section of the guide for more information

Budgetary control should be today's date.	 This is the date that will appear on the budget statement
Add the recipient.	 This is the Tulane employee completing the requisition **TIP** Search is last name, first name
Add the recipient's delivery building.	 This is the building for the Tulane employee completing the requisition This needs to match the building in the Delivery section
Add the recipient's room number.	 This is the room number for the Tulane employee completing the requisition **TIP** If delivering to JBJ, choose JBJ for the building and enter the specific building and room number here **TIP** If delivering to TNBRC, choose TNBRC for the building and enter the specific building and room number here
Add a note to Supplier if applicable.	

Add all attachments for the requisition here as **one** PDF.	
Click Update.	
Update any line items.	 This is where spilt allocations and adding the RASU details occur (add the RASU details everytime a Sponsored Project is used), complete those steps if applicable
Click Submit.	 The three dots will allow a requisitioner to check funds, view approvers, view a pdf of the requisition or save for later

What does the process look like for the payee?

The payee receives an email from Candex.



To: Seller
From: Tulane University (Via Candex)
Subject: Action Required: Accept Payment PO#: CTPO1239045

Speaking Engagement - April
California, United States | PO# CTPO1239045

TULANE UNIVERSITY

Deliver to
Tulane University

Request Payment

Zack,

A payment of 500 USD is authorized to you.

Items:
Speaking Engagement - April

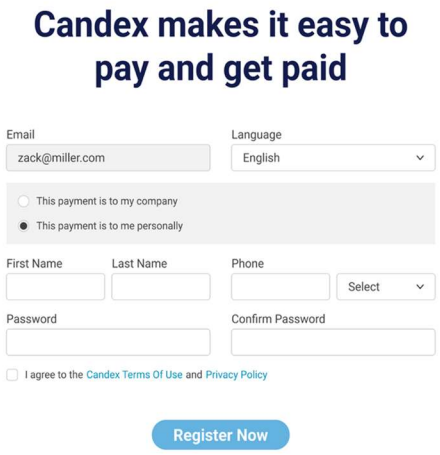
Click Here to get paid.

Candex allows businesses to engage and exchange payments in a compliant way without setup in each other's financial systems.

View FAQs
Support at support@candex.com

CANDEX

The payee registers with Candex.



Candex makes it easy to pay and get paid

Email: zack@miller.com
Language: English

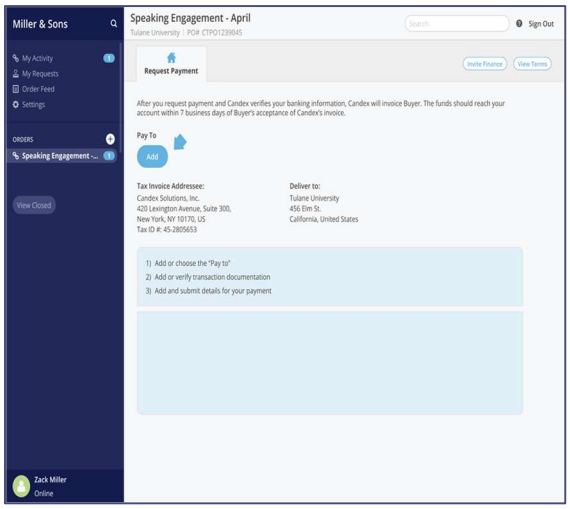
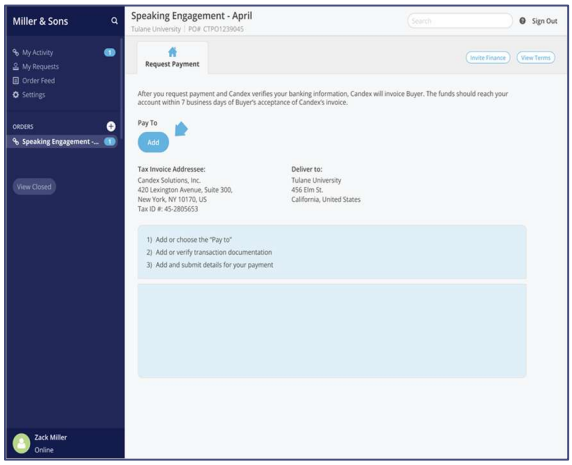
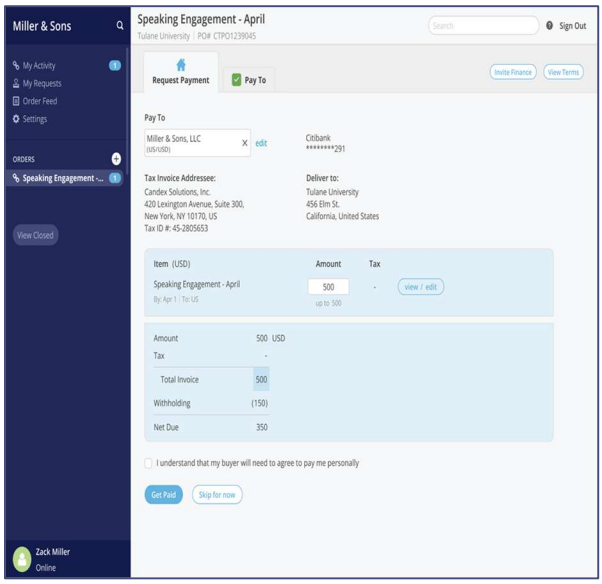
This payment is to my company
This payment is to me personally

First Name | Last Name | Phone | Select

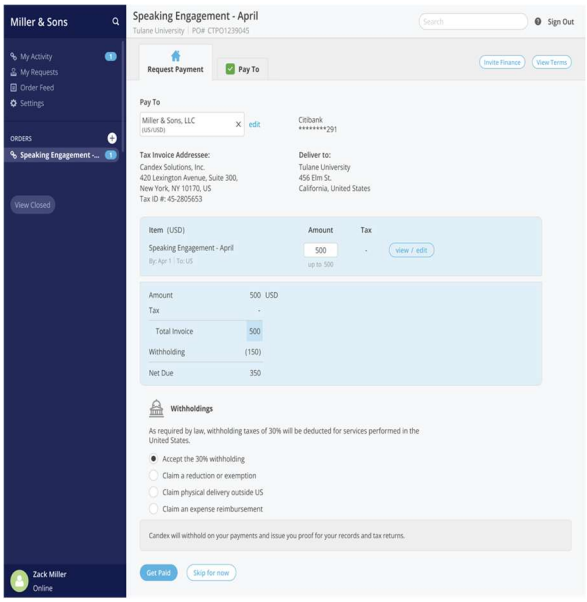
Password | Confirm Password

I agree to the Candex Terms Of Use and Privacy Policy

Register Now

The payee begins the payment request by adding "Pay To" Details.	
The payee adds their payment details.	
The payee completes the payment request.	

The payee completes the tax withholding screen.

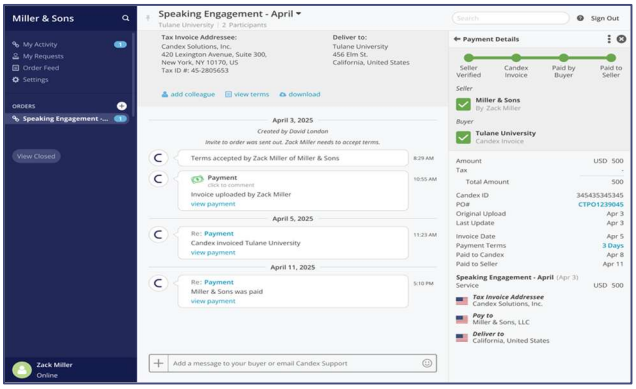


International Students should select Passive Income

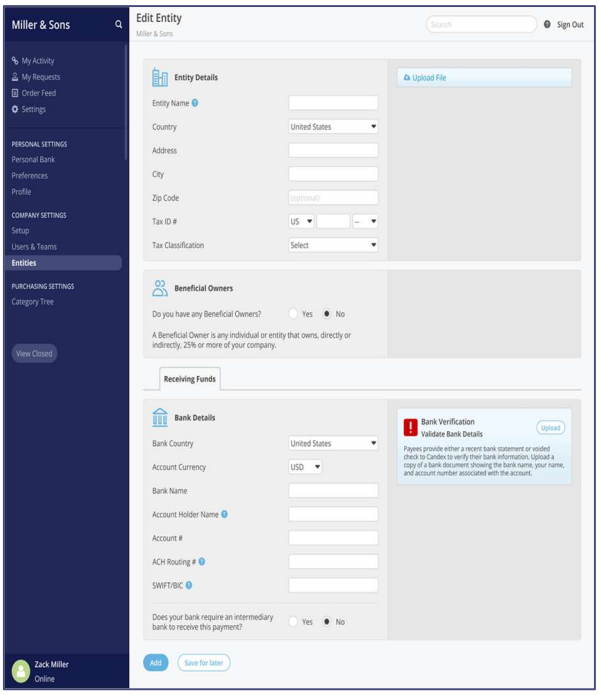
To receive the 14% tax rate they will need to provide proof of F-1/J-1 status (DS-2019 or I-94)

For Tax Treaty Benefits (0% or reduced) a completed W-8BEN (including the treaty claim) and a valid US Taxpayer ID (SSN or ITIN) needs to be provided

The payee receives requisition status updates.



Payee can update their bank details at any time.



Draft Email for Payees

Dear_____,

We are submitting payment for you through Candex to ensure that you are paid as quickly as possible. You will receive an email from Candex to set up and complete the payment request through the Candex platform. Please note that all payment and other order terms are determined by Tulane University.

Benefits of working with Candex:

- **Fast & Simple** – only 1 minute registration and if you already have a Candex account you can just log in to complete the transaction
- **Easy & Innovative** - User-friendly portal with real-time updates and transparent payment schedule
- **Secure** - your data is protected with industry-standard security measures and encryption protocols
- **Candex has you covered** - a designated support team available to help answer your questions

How does it work:

- You will receive an email from Candex informing you that you have a payment authorization from Tulane University on the Candex platform, with a link to request your payment
- You register, accept Terms & Conditions, and add your payment details
- You submit your payment request
- Candex validates your information and runs standard compliance screening. When everything is clear, funds are transferred to you. This usually takes about a week.

Need Help?

If you need any support throughout, please feel free to reach out to support@candex.com. Please note that you can change your language settings on the platform when you register.

Should you have any questions about the process, please do not hesitate to reach out.

Employee Name

Signature