

# UNIVERSITY OF DELAWARE<sup>®</sup> EXCHANGE

*Completing the Consultant Form*

*Updated 5/30/25*

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# Definitions

- Consultant – any non-University personnel who is engaged by the University for expertise required to fulfill University commitments and objectives for Research, Public Service or Instructional Activities.
- Questionnaire – throughout this document and the Consultant Form you will see a questionnaire referenced. This is the Independent Contractor vs Employee Disclosure (ICED) questionnaire which is an HR document used to determine if a consultant should be onboarded as a supplier or employee.



# Overview

- Previously, two processes were required: first the Consultant Disclosure webform for authorize the engagement, then a requisition workflow to engage and pay the consultant.
- With the new Consultant Form, the entire process has been combined into one approval workflow in UDX.
- Departmental approvals will be required based on responses in the form
- **Note: Supplier must be active and fully approved in UD Exchange before the form can be completed.**



# New Consultant Form



Organization Message


Welcome to the University of Delaware Exchange **Test Site!**


The test site does not create live purchase orders or payments sent to suppliers. The integrations are set up to use the FITST


The Consultant Form can be found under the Procurement Forms section of the Catalog & Forms Showcase on the Shopping Home Page. Click on the form to open.


Catalog & Forms Showcase (Under Development)


Procurement Forms


  
Non-PO Payment Request


  
Honorarium Payment Request


  
Subaward Request

  
Single-Line Subaward Request

  
Single-Line NIIMBL Subaward

  
UDX Access Request Form

  
NEW Waiver of Bid Request

  
Consultant Form

Action Items

MY ASSIGNED APPROVALS

Vouchers

UNASSIGNED APPROVALS

Requisitions

ORDERS

My Returned Requisitions

My Resources

My Resources ★

Product Release Library | procurement@udel.edu  
Site Map

Quick Links

- UD Exchange How To Guides
- How Do I Buy ???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Non-Catalog Item
- NEW Waiver of Bid Form
- Request Contract

My Draft Carts

Showing Results 1 - 3 of 3

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
--------	------	-----------	--------	-------

The first page is the Instructions page. Please read and click **Next** when ready to move forward.

Shop Shopping View Forms

Back to Shopping Home

Consultant Form

Form Number 1135007

Purpose Procurement Request

Status Incomplete

Instructions

Suppliers ✓

Attachments ✓

Form Fields ✓

Review and Submit

Suppliers Request Actions History ?

Supplier Please select a fulfillment center below.

Search Registered Suppliers

Supplier DCI

Zip Code Within 5 Miles

Enter Supplier information.  
Click **Search**.

Search

Previous Next



Review and Submit

Request Actions History ?

Clear Search

◀ Prev  Next ▶

Select the correct fulfillment center for the supplier.  
Click **Next**.

UNIVERSITY OF DELAWARE  
EXCHANGE  
TEST SITE

Shop ▸ Shopping ▸ View Forms

Back to Shopping Home

Consultant Form

Form Number 1135007  
Purpose Procurement Request  
Status Incomplete

Instructions

Suppliers ✓

Attachments ✓

Form Fields ⚠

Review and Submit

Attachments

Request Actions ▾ History ?

Please add your attachments below.

Add Attachment

Click **Add Attachment** to attach pertinent documents.

Previous Save Progress Next

→

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UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All Search (Alt+Q) 90,250.00 USD

Shop Shopping View Forms

Back to Shopping Home

Consultant Form

Form Number 1135007

Purpose Procurement Request

Status Incomplete

Instructions

Suppliers

Attachments

Form Fields

Review and Submit

Attachments

Please add your attachments below.

Add Attachment

Add Attachment

Attachment \* No File Attached Upload

\* Required Save Changes Close

Save Progress Next

Click **Upload** to attach each item.

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All Search (Alt+Q) 90,250.00 USD

Shop Shopping View Forms

Back to Shopping Home

Consultant Form

Form Number 1135007

Purpose Procurement Request

Status Incomplete

Instructions

Suppliers

Attachments

Form Fields

Review and Submit

Attachments

Please add your attachments below.

Add Attachment

Upload

Title CV

File PJ\_CV.docx

Maximum upload file size: 25.0 MB

Required

Save Changes

Close

Attach the file and provide a Title.

Click **Save Changes**.

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UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All Search (Alt+Q)90,250.00 USD

ShopShoppingView Forms

Back to Shopping Home

Consultant Form

Form Number1135007

PurposeProcurement Request

StatusIncomplete

Instructions

Suppliers

Attachments

Form Fields

Review and Submit

Attachments

Please add your attachments below.

Add Attachment

Request Actions

History

Add Attachment

Attachment \*CVUpload

★ Required

Save ChangesClose

Save ProgressNext

Click Save Changes again.

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[Shop](#) > [Shopping](#) > [View Forms](#)

[Back to Shopping Home](#)

### Consultant Form

Form Number 1135007

Purpose Procurement Request

Status Incomplete

Instructions

Suppliers

Attachments

Form Fields

Review and Submit

### Attachments

Request Actions History ?

#	Attachment	
1	CV	<div>Edit</div>

Add Attachment

Repeat as needed for all documents.  
Click **Next** when finished.

< Previous

Save Progress

Next >

## Consultant Form

Form Number	1135007
Purpose	Procurement Request
Status	Incomplete

### Instructions

Suppliers 

Attachments 

## Form Fields

Review and Submit

### Form Fields - Consultant Disclosure Questionnaire

▼ On This Page

CONSULTANT QUALIFICATIONS (5)  
EMPLOYMENT RELATIONSHIP (18)  
SCOPE AND FUNDING QUESTIONS (2)

### ▼ CONSULTANT QUALIFICATIONS

Why is the expertise of the consultant needed and cannot be met by the utilization of a regular University employee within the context of his or her employment agreement with the University? ★ Q

2000 characters remaining

Have you attached a current CV? ★ 🔍

☐ Yes ☐ No

What selection process has been used to secure the most qualified personnel available, considering the nature and extent of expertise required? ★ 🔍

2000 characters remaining

[← Previous](#)

Save Progress

Next >



EMPLOYMENT RELATIONSHIP

RELATIONSHIP WITH THE UNIVERSITY

Was the individual a UD employee this calendar year? \*

☐ Yes ☒ No

Are other Employees at UD performing the same or similar services, or has this individual perform similar service as a UD employee? \*

☐ Yes ☒ No

Does the worker perform these services for other employers as an independent contractor? \*

☒ Yes ☐ No

Is this a recurring engagement? \*

☐ Yes ☒ No

OPPORTUNITY FOR PROFIT OR LOSS

Responses to questions in the **Employment Relationship** section may trigger Human Resources (HR) review.







Shop Shopping View Forms

RELATIONSHIP WITH THE UNIVERSITY

Was the individual a UD employee this calendar year? \*

☒ Yes ☐ No

If yes, explain any unusual circumstances why this person should be hired as a consultant. \*

2000 characters remaining

Are other Employees at UD performing the same or similar services, or has this individual perform similar services?

☒ Yes ☐ No

If yes, explain any unusual circumstances why this person should be hired as a consultant. \*

2000 characters remaining

Because you answered "yes", the Questionnaire is required to be filled out and attached.

Because you answered "yes", the Questionnaire is required to be filled out and attached.

If the "Questionnaire is required" is showing, please fill out and attach the ICED Questionnaire here.

[Download ICED Questionnaire](#)  
No File Attached Upload

The responses provided will determine whether the ICED Questionnaire must be attached. There may be more than one warning to attach the questionnaire.

< Previous Save Progress Next >



OPPORTUNITY FOR PROFIT OR LOSS

Is the worker required to perform the services personally? (Answer 'No' if they are allowed to have an assistant or other employee(s) perform the services on their behalf.) \*



☒ Yes ☐ No

Does the worker have a direct interest in or share of any profit or loss of the work accomplished? \*



☐ Yes ☒ No

Does UD provide all supplies, equipment, materials and property for the work being done? \*



☐ Yes ☒ No

Because you answered "yes", the Questionnaire is required to be filled out and attached.

If the "Questionnaire is required" is showing, please fill out and attach the ICED Questionnaire here.



[Download ICED Questionnaire](#)  
No File Attached

SCOPE AND FUNDING QUESTIONS

If required, the completed questionnaire must be uploaded at the prompt shown. The form will not be able to be submitted if it is only uploaded in the Attachments tab.



Does the provider supply, equipment, materials and property for the work being done?

☐ Yes ☒ No

Because you answered "yes", the Questionnaire is required to be filled out and attached.

▼ SCOPE AND FUNDING QUESTION

[Download ICED Questionnaire](#)

No File Attached

▼ SCOPE AND FUNDING QUESTION

Have you attached a SOW outlining the scope of services & fees? ★

☒ Yes ☐ No

▼ PROJECT/CONTRACT INFORMATION

Project/contract Information ⓘ

Product Description ★

1000 characters remaining

Unit Price ★

USD

Quantity ★

Total

0.00 USD

Previous

Save Progress

Next

Once **Scope and Funding** is answered, the **Project/Contract Information** section will appear. This section is your requisition information (what will appear on the requisition, PO, and voucher).



Does the provider of supplies, equipment, materials and property for the item being sold...

☐ Yes ☒ No

Because you answered "yes", the Questionnaire is required to be filled out and attached.

If the "Questionnaire is required" is showing, please fill out and attach the ICED Questionnaire here. 🔍

📎 ICED Questionnaire  
No File Attached

▼ SCOPE AND FUNDING QUESTION

Have you attached a SOW outlining the scope of services & fees? ★ 🔍

☒ Yes ☐ No

Make sure to add the contract timeline to the Product Description.

▼ PROJECT/CONTRACT INFORMATION

Project/contract Information ⓘ

Product Description ★

paying \$100/hr x 70 hours for the assistance of transitioning from system a to system b. Once 70 hours are met each month, the price goes to \$125/hour for the remainder of the month. The estimated timeline for this is 7/1/25-6/31/26.  
767 characters remaining

Unit Price ★  USD Quantity ★  Total

Once completed, click **Next**.

→

Shop ▶ Shopping ▶ View Forms

Back to Shopping Home

Consultant Form

Form Number 1135007

Purpose Procurement Request

Status Incomplete

Instructions

Suppliers ✓

Attachments ✓

Form Fields ✓

Review and Submit

Review and Submit

Request Actions History ?

Required Fields Complete

Section	Progress
Suppliers	Required Fields Complete
Attachments	Required Fields Complete
Form Fields	Required Fields Complete

Previous Add to Favorites Add and go to Cart

Add and go to Cart

Save to Cart and Add Another

Add to Cart and Return

Add to new Cart

Add to Draft Cart or Pending PR/PO

Add to Draft Change Request

Add to PO Revision

In this example, a second line is needed. To create a second line, click the **dropdown arrow** and select **Save to Cart and Add Another**.  
If a second line is not needed, skip to slide [24](#).

A second line would be necessary for multiple rates, travel/per diem, etc.

The second form is simply a copy of the first form and will prefill that form's data. Edit the fields to make any necessary changes to the second line, and click **Next**.

Shop ▸ Shopping ▸ View Forms

⬅ Back to Shopping Home

Consultant Form

Form Number 1135007

Purpose Procurement Request

Status Incomplete

Instructions

Suppliers ✓

Attachments ✓

Form Fields ✓

Review and Submit


Review and Submit

Request Actions ▾ History ?

✓ Required Fields Complete

Section	Progress
Suppliers	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete

⬅ Previous

Add  Add and go to Cart ▾

Once completed, click **Add and go to Cart.**

# Cart & Checkout







## Shopping Cart • Shopping Cart

Assign cart

Proceed To Checkout

In cart, click **Proceed To Checkout**.

Go to: [Non-Catalog Item](#) [Service Item](#) [Favorites](#) [Forms](#) [Shop](#) [Trade-In](#) [Quick Order](#) [Browse](#) [Suppliers](#) [Categories](#) [Contracts](#)

Simple **Advanced**

Cart Name

Description

Multi-Invoice/Payment

☒

After-The-Fact Purchase

☐

Waiver of Bid

☐

Details ▾

For  
Caitlin Taype Nunura

Total (19,000.00 USD) ▾

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal ★

19,000.00

Total ★

19,000.00

180 Items ☐

DCI CONSULTING GROUP INC · 180 Items · 19,000.00 USD ☐

^ SUPPLIER DETAILS

Contract

no value

PO Number



Requisition • 4289660

👁️ 🖨️ 🗨️ ⋮

Assign Cart

Place Order

Summary PO Preview Comments Attachments 2 History

General

Shipping

Billing

Cart Name

2025-05-19 702745236 02

Description

no value

Priority

Normal

Prepared by

Caitlin Taype Nunura

Prepared for

Caitlin Taype Nunura

Department

PROCUREMENT SERVICES (04750)

Ad-Hoc Approver

Add

Multi-Invoice/Payment

✓

Purchasing

00001

Business Unit

UNIVERSITY OF DELAWARE

Payment Term

×

Override

Tax Flag

×

Internal Fields

UD Internal Fields

eBuilder Process Instance

no value

After-The-Fact Purchase

×

Technology Request #

no value

Warnings, errors, and omissions will appear in the **Summary section** at checkout. Ensure that all required and suggested fields are completed including funding source, commodity, account codes, and business justification.

Summary

Draft

✖ Correct these issues.

You are unable to proceed until addressed.

[Required: Commodity Code \(Line 1\)](#)

[Required: Account Code \(Line 1\)](#)

[Required: Commodity Code \(Line 2\)](#)

[Required: Account Code \(Line 2\)](#)

Your responses on the form require the completed ICED Questionnaire to be uploaded in the Employment Relationship area of the form. Please do so to clear this error and submit the requisition.

⚠ Be aware of these issues.

You may review and proceed.

The selected Ship to Address is a non-UD address. To ship to a non-UD address, please make sure the Internal Notes/Business Justification includes the reason or need (who, what, where, when, why) for the items to be sent to a non-UD address. Please identify if the items will be returned to campus as the property of UD. This is necessary for audit purposes and, if shipped outside of Delaware, tax purposes.

Total (19,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Requisition • 4289660

Summary PO Preview Comments Attachments 2 History

General

Cart Name2025-05-19 702745236 02

Descriptionno value

PriorityNormal

Prepared byCaitlin Taype Nunura

Prepared forCaitlin Taype Nunura

DepartmentPROCUREMENT SERVICES (04750)

Ad-Hoc ApproverAdd

Multi-Invoice/Payment

Shipping

Ship To

Shipping address \*1-TIME code

UNIVERSITY OF DELAWARE  
Attn: Sam Shopper

Billing

Bill To

Accounts Payable  
accountspayable@udel.edu  
222 South Chapel Street  
Newark, DE 19716  
United States

Internal Fields

UD Internal Fields

eBuilder Process Instancenot value

After-The-Fact Purchase

Technology Request #not value

If the consultant will receive multiple payments per line, check the Multi-Invoice/Payment box so that the PO is set up as an amount based (blanket). To do so, click the **Pencil** for the **General** section.

Summary

Draft

Correct these issues.

You are unable to proceed until addressed.

Your responses on the form require the completed ICED Questionnaire to be uploaded in the Employment Relationship area of the form. Please do so to clear this error and submit the requisition.

Be aware of these issues.

You may review and proceed.

The selected Ship to Address is a non-UD address. To ship to a non-UD address, please make sure the Internal Notes/Business Justification includes the reason or need (who, what, where, when, why) for the items to be sent to a non-UD address. Please identify if the items will be returned to campus as the property of UD. This is necessary for audit purposes and, if shipped outside of Delaware, tax purposes.

Total (19,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal

19,000.00

19,000.00

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Requisition • 4289660

Summary

PO Preview

Comments

Attachments 2

History

General

Shipping

Cart Name

2025-05-19 702745236 02

Description

no value

Priority

Normal

Prepared by

Caitlin Taype Nunura

Prepared for

Caitlin Taype Nunura

Department

PROCUREMENT SERVICES (04750)

Ad-Hoc Approver

[Add](#)

Multi-Invoice/Payment

✓

Ship To

Shipping address: STC1

code

UNIVERSITY OF DELAWARE  
Attn: Caitlin Taype Nunura  
Room: 123  
100 Discovery Blvd  
STAR TOWER  
Newark, DE 19713  
United States

Internal Fields

UD Internal Fields

eBuilder Process Instance

no value

After-The-Fact Purchase

✗

Technology Request #

no value

Waiver of Bid

✗

Edit General

General

Cart Name ★

2025-05-19 Consultant Form

Description

DCI System Transition Consultant Form

Priority

Normal

Prepared by

Caitlin Taype Nunura

Prepared for

DPS, Dottie

Department

PLANT & SOIL SCIENCE (02170)

Multi-Invoice/Payment

☐

★ Required fields

Save

Close

Summary

Draft

✗ Correct these issues.

You are unable to proceed until addressed.

Your responses on the form require the completed ICED Questionnaire to be uploaded in the Employment Relationship area of the form. Please do so to clear this error and submit the requisition.

Total (19,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal

19,000.00

19,000.00

What's next for my order?

Next Step

COA Approver

Approvers

[Drag, Amy](#)  
[Procurement Help](#)

Workflow

Show skipped steps

Draft

Active

Caitlin Taype Nunura

PR Validation

Click the Multi-Invoice/Payment box.

Click Save.

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Requisition • 4289660

Assign Cart

Place Order

Summary PO Preview Comments Attachments 2 History

General

Cart Name2025-05-19 Consultant Form

DescriptionDCI System Transition Consultant Form

PriorityNormal

Prepared byCaitlin Taype Nunura

Prepared forDottie DPS

DepartmentPLANT & SOIL SCIENCE (02170)

Ad-Hoc ApproverAdd

Multi-Invoice/Payment

Shipping

Ship To

Shipping addressSTC10 code

UNIVERSITY OF DELAWARE

Attn: Caitlin Taype Nunura

Room: 123

100 Discovery Blvd

STAR TOWER

Newark, DE 19713

United States

Billing

Bill To

Accounts Payable

accountspayable@udel.edu

222 South Chapel Street

Newark, DE 19716

United States

Billing Options

Purchasing Business UnitUOD01 UNIVERSITY OF DELAWARE

Payment Term Override

Tax Flag

Internal Fields

Technology Request #no value

Waiver of Bid

Summary

Draft

Correct these issues.  
You are unable to proceed until addressed.

Your responses on the form require the completed ICED Questionnaire to be uploaded in the Employment Relationship area of the form. Please do so to clear this error and submit the requisition.

Total (19,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal19,000.00

19,000.00

What's next for my order?

Next StepCOA Approver

ApproversDrag, Army  
Procurement Help

Workflow

Show skipped steps

Draft

Active

Caitlin Taype Nunura

On behalf of: Dottie DPS

A checkmark should now be visible next to **Multi-Invoice/Payment**.



UNIVERSITY OF DELAWARE  
EXCHANGE

TEST SITE

AllSearch (Alt+Q)90,250.00 USD

Assign CartPlace Order

Requisition • 4248862

SummaryPO PreviewCommentsAttachmentsHistory

GeneralShippingBilling

Cart Name

Description

Priority

Prepared by

Prepared for

Department

Ad-Hoc Approver

Multi-Invoice/  
Payment

Because you answered "yes", the Questionnaire is required to be filled out and attached.

If the "Questionnaire is required" is showing, please fill out and attach the ICED Questionnaire here.

ICED Questionnaire

No File AttachedUpload

Internal Fields

Waiver of Bid

Summary

Draft

Correct these issues.

You are unable to proceed until addressed.

Due to answering "yes" on some of the questions, the Questionnaire is required to be filled out and attached. Please go back and attach it to "If the "Questionnaire is required" is showing, please fill out and attach the ICED Questionnaire here."

Total (90,250.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

90,250.0090,250.00

Workflow

Draft

Active

Dottie DPS

If you have multiple lines, then you will need to add the questionnaire to all lines that trigger the requirement.

As indicated in slide 18, you will be unable to submit the requisition until the ICED form is uploaded to the required section. If you see this error, please return to the form(s) to do so.

UNIVERSITY OF  
DELAWARE

29

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[Assign Cart](#)  [Place Order](#)

General A Shipping A Billings A V

If the "Questionnaire is required" is showing, please fill out and attach the ICED Questionnaire here. 

[Download](#) [Iced](#) [Upload](#) [▼](#)

[< Previous](#)
[Save Progress](#)
[Next >](#)

Override

### UD Internal Fields

Waiver of Bid ✖

Once the completed questionnaire has been uploaded where required the checkout validation error will automatically clear. Click **Place Order**.

Draft

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	19,000.00
	<u>19,000.00</u>

### What's next for my order?

Next Step COA Approver

Approvers	Drag, Amy Procurement Help
-----------	-------------------------------

## Workflow

☐ Show skipped steps

**Draft**  
Active  
Caitlin Taype Nunura  
On behalf of: Dottie DPS

**PR Validation**  
Future

**COA Approved**  
Future





Go to: [Non-Catalog Item](#) [Service Item](#) [Favorites](#) [Forms](#) [Shop](#) [Trade-In](#) [Quick Order](#)   [Browse: Suppliers](#) [Categories](#) [Contracts](#)

**Simple**   Advanced

Search for products, suppliers, forms, part number, etc.



## ✓ Requisition 4289660 Submitted

### Summary

Requisition number	4289660
Requisition status	Pending
Cart name	2025-05-19 Consultant Form
Requisition date	6/17/2025
Requisition total	19,000.00 USD
Number of line items	2

### Options

- [Print](#)
- [Recent orders](#)
- [Return to your home page](#)

The requisition summary screen confirms that the requisition has been submitted.





# Workflow

- If grant-funded, the workflow will include review by the Research Office at the Grant Approval workflow step.
- If the ICED Questionnaire is required, the workflow will include review by Human Resources at the Commodity Approval workflow step.
- Procurement Services reviews all consultant form requisitions.
- While ad-hoc approvers can be added to workflow by the submitter or any approver, this may delay the approval process.



## Questions:

- [HR](#)
- [Research Office](#)
- [procurement@udel.edu](mailto:procurement@udel.edu)

## Resources:

- [UDX Consultant Form Questions](#) (word template of UDX form questions)
- [Independent Contractor vs Employee Determination Form](#)
- [Statement of Work \(SOW\) Form](#)
- [Waiver of Bid Form](#)
- [Consultants for Research, Public Service or Instructional Activities](#)
- [Procurement Services Website](#)

