ELAWARE. 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

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incomplete	Click here for UD's current policy and here for the Research Office communication.
Instructions	Required attachments to this form should include, but are not limited to, the following documents:
Suppliers	Consultant Curriculum Vitae (CV)/Resume
Attachments	 Statement of Work (SOW) – this should be in draft form and Procurement will help facilitate signature If applicable, the Waiver of Bid form is required for all transactions greater than \$10,000 per Uniform Guidance
	If applicable, independent Contractory & Employee Disclosure ("ICED") Questionnaire. HR requires this form if the proposed consultant needs further review to be
Form Fields	determined an independent contractor. The form will tell you if the questionnaire is needed.
Review and Submit	For additional support in completing this form, please refer to the Completing the Consulting Form guide.
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	and click Next when ready to move forward.





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repared by	Caitlin Taype Nunura	Attn: Caitlin Taype Nunura Room: 123	Prepared by	Caitlin Taype Nunura			the requisition.	
repared for	Caitlin Taype Nunura	100 Discovery Blvd STAR TOWER	Prepared for	DPS, Dottie	Q		Total (19,000.00 USD) Shipping, Handling, and Tax charges are calculated	d and charge
epartment	PROCUREMENT SERVICES (04750)	Newark, DE 19713 United States	Department	PLANT & SOIL SCIENCE (02170)			each supplier. The values shown here are for estim budget checking, and workflow approvals.	ation purpo
d-Hoc Approver	Add		Multi-Invoice/Payment		LAVVA	ANE	Subtotal	19,00
Multi- nvoice/Payment	\checkmark							19,00
			★ Required fields	Save	lose		What's next for my order?	
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							Approvers Drag, Amy Procurement Help	
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Summary	PO Preview Comments Attachmen	ts 2 History						
General	ø	Shipping	\$	Billing			Summary	
Cart Name	2025-05-19 Consultant Form	Ship To		Bill To			Scorrect these issues.	
escription riority repared by	DCI System Transition Consultant Form Normal Caitlin Taype Nunura	Shipping address STC10 code UNIVERSITY OF DELAWARE Attn: Caitlin Taype Nunura		Accounts Payable accountspayable@ut 222 South Chapel Str Newark, DE 19716 United States	lel.edu eet		You are unable to proceed until address Your responses on the form require t Questionnaire to be uploaded in the I area of the form. Please do so to cle- the requisition.	ed. he completed ICED Employment Relation: ar this error and subm
Prepared for	Dottie DPS	Room: 123 100 Discovery Blvd STAR TOWER		Billing Options			Total (19,000.00 USD)	alculated and charge
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/ulti- nvoice/Payment	~			Payment Term Override	×		Subtotal	19,00 19,00
				Tax Flag	×		What's next for my order?	
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General			∢ ∨	Summary	
Cart Name	Because you answered "yes", the Questionnaire is required 1	to be filled out and attached.		S Correct these issues.	
Description				You are unable to proceed until addr	ressed.
Priority	If the "Questionnaire is required" is showing, please fill out and a	ittach the ICED Questionnaire here.		Due to answering "yes" on some o Questionnaire is required to be fill Please go back and attach it to "t	of the questions, led out and attack f the "Questionna
Dropared by				required" is showing, please fill ou Questionnaire here."	ut and attach the
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Department		RSITY	(OF DELAWARE	estimation purposes, budget checking	, and workflow
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		the requisition until the I	CED form is uplo	baded to the	
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Requisition • 4289660		
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Concert	A Objector A Dillor	🗸 Summary
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± Iced Upload ▼		19,0
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	unloaded where required the checkout validation	Show skipped steps
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UD Internal Fields	error will automatically clear. Click Flace Of der.	Active Caitlin Taype Nunura
eBuilder Process Instance	no value	On behalf of: Dottie DPS
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Go to:Non-Catalog Item Service Item Favorites Forms Shop Trade-In Quick Order Browse: Suppliers Categories Contracts

Simple Advanced

Search for products, suppl	iers, forms, part number, etc.	a
Requisition	n 4289660 Submitted	
Summary		Options
Requisition number	4289660	□ Print
Requisition status	Pending	Recent orders
Cart name	2025-05-19 Consultant Form	Return to your home page
Requisition date	6/17/2025	
Requisition total	19,000.00 USD	The requisition summary screen confirms
Number of line items	2	that the requisition has been submitted.

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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:

- <u>HR</u>
- <u>Research Office</u>
- procurement@udel.edu

Resources:

- <u>UDX Consultant Form Questions</u> (word template of UDX form questions)
- Independent Contractor vs Employee Determination (ICED) Form
- <u>Statement of Work (SOW) Form</u>
- Waiver of Bid Form
- <u>Consultants for Research, Public Service or Instructional Activities</u>
- Procurement Services Website

