# Supplier Onboarding Changes as of January 12, 2026

All Suppliers Must Register in the UDX Supplier Portal

➢ The UDX Supplier Portal delivers **streamlined onboarding** for domestic suppliers, foreign suppliers and UD affiliated students and employees.

- Domestic suppliers **no longer** complete the online UD substitute W-9 to onboard or update their record.
- End users **should not** submit tickets with W-8 and SDC forms for foreign suppliers.
- End users will need to submit a **request to invite a supplier**.
- Student transactions are **no longer** processed through webforms with exception of refunds, reimbursements & low dollar HSPs
- End Users now have **full visibility** into where a supplier is in the registration process

➢ **The UDX Supplier Portal is LIVE as of January 12, 2026**

- All **new domestic and foreign suppliers,** as well as **existing suppliers (including students)** who require **any updates** to their supplier record, must be invited to self-register through the UDX Supplier Portal.
- Invitations will be sent from UDX by the Procurement Supplier Team. Once registered, suppliers receive **24/7 access** to their record and can update tax details, addresses, payment method, contacts, and more. *All changes will be reviewed and approved by the Procurement Supplier Team.*

Procurement Transaction Changes as of January 2026

UD affiliated payees (Employees, Students, & Student Employees) will now be paid via the UD Employee or Student Non-PO Payment form rather than PTI.
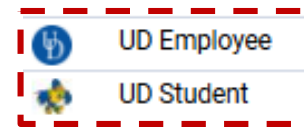
- **The NPOP Matrix will be updated.** The following exceptions apply:
  - **Refunds** will remain as a PTI; these are non-taxable payments and to help reduce time & effort, the payee does not need to be onboarded. *Note: UDX can also be used but payee needs to be onboarded*
  - **Reimbursements** will remain as a PTI for Students & Student Employees; and Concur should always be used for Employees. These are non-taxable payments and to help reduce time & effort, the payee does not need to be onboarded. *Note: UDX can also be used for Student/Student Employees but payee needs to be onboarded*
  - **HSP Payments <$500** will use the PTI; only name & address is required (no more SSN)
  - **HSP Payments ≥$500** will use the NPOP, UD Employee NPOP or UD Student NPOP

Notes: 1) Payment requests for Student Employees should be submitted on the UD Student NPOP; 2) PTI payments are only allowable to U.S. based addresses or available for pickup at the Cashier's Office, otherwise UDX NPOP is required for Wire payments

Supplier Onboarding Overview

This guide explains how to request a **new supplier** be invited to register using the Supplier Request Form in UDX.

A. Beginning January 2026, the UD substitute W9 will no longer be in use.

- All **new suppliers** must be invited to register in the UDX Supplier portal before they can become active for purchasing activity. This requirement applies to:
  - Domestic individuals and entities
  - Foreign individuals and entities
  - UD affiliated students & employees
- If you need to register **more than 10 suppliers at once** (e.g. students receiving stipends for a summer program), please refer to the **Completing the Bulk Supplier Request Form guide**

Onboarding a New Supplier in UD Exchange:
Required Details

Individual & Entities

- ➢ Supplier Name (e.g. W.B. Mason)
- ➢ Contact Details:
    - ▪ First Name
    - ▪ Last Name
    - ▪ Title/role (optional)
    - ▪ Email Address
    - ▪ Phone (optional)
    - ▪ Website URL (optional)
- ➢ Supplier description and reason for onboarding

*This will be the contact who receives the UDX Invitation to complete the supplier onboarding process

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Onboarding a New Supplier in UD Exchange:
Where to start

➢ **Always** **Search UDX first** to confirm whether the supplier is already onboarded before submitting a Supplier Request Form.

-Access the left navigation menu
-Click Suppliers→ Manage Suppliers→ Search for a Supplier or use the *Quick Search*

Onboarding a New Supplier in UD Exchange: *Where to start*

Active suppliers display a **green check mark**
- These suppliers **do not** need to be re-invited or onboarded again; there is no need to complete the Supplier Request Form.
- If new or updated information is required for an active supplier record, the supplier must be invited to register for the Supplier Portal so they can manage their own record.
- **If the supplier is already registered, the supplier needs to simply login into the Supplier Portal to make updates.**
- If a Supplier is not registered in the Supplier portal or is unsure, the supplier or the dept. representative should email procurement@udel.edu for assistance.

Inactive suppliers display a **red "X"** with the status "**Inactive**".
- Complete all required information on this Supplier Request Form. Procurement will review the request and may "**Reject**" the form due to a duplicate supplier name. Don't worry, this usually means the Supplier was *Reactivated* and sent an onboarding invitation. **You can look up the Supplier Name to follow the progress of their registration.**
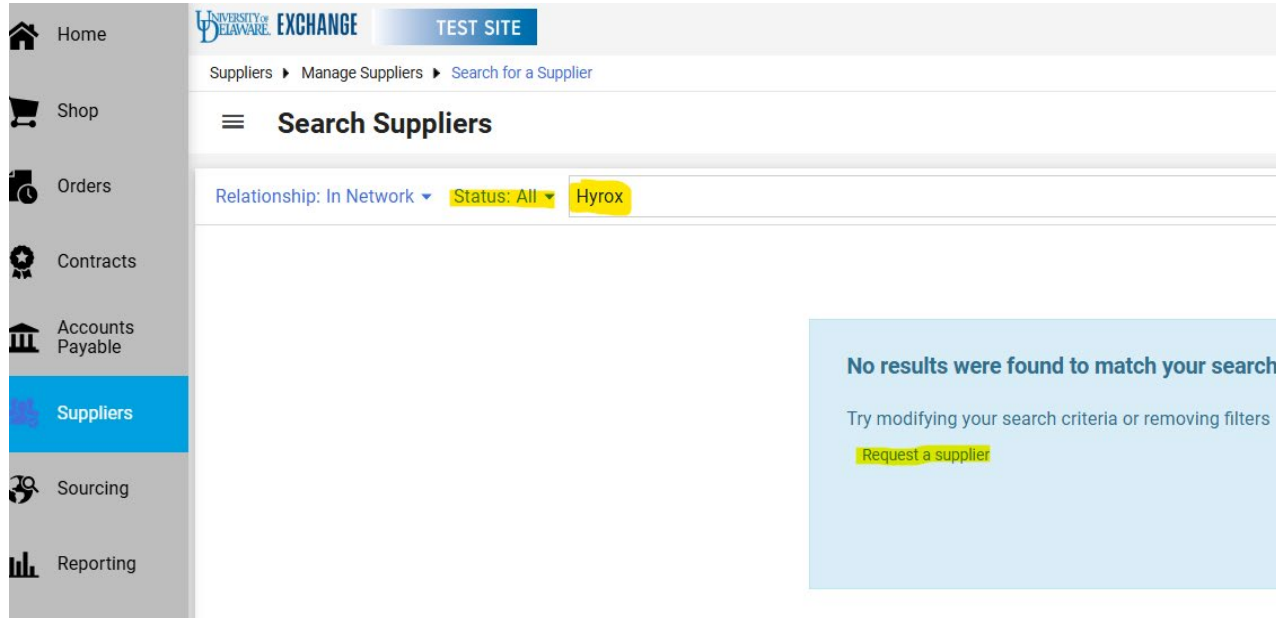
Onboarding a New Supplier in UD Exchange:
Where to start

-If your search yields ***No Results*** you can click on **Request a Supplier** or refer to next slide for additional options to access the **Supplier Request Form** in UDX
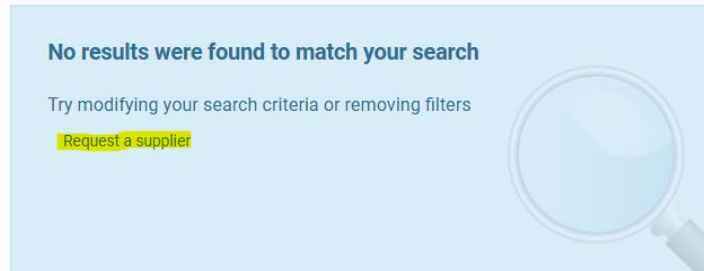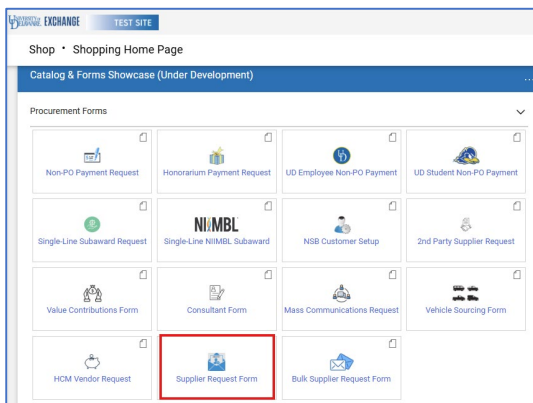
How to Access the Supplier Request Form

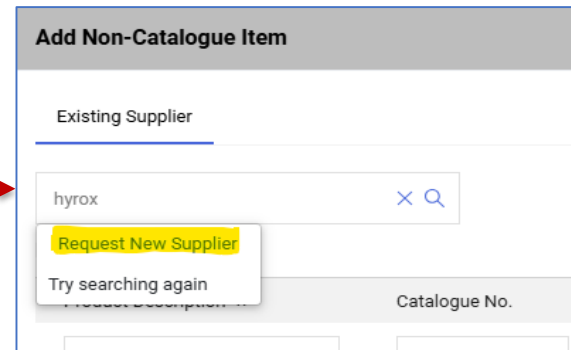**There are four (4) ways to Request a Supplier in UDX**

Option 1: UDX Suppliers Icon (left ribbon) Suppliers→ Requests→Request New Supplier

Option 2: UDX Shopping Home Page→Catalog & Forms Showcase→Supplier Request Form tile

Option 3: Request a New Supplier directly from your Non-Catalog Requisition when no supplier is found

Option 4: Request a Supplier directly from the search screen when no results are found (see previous slide)

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-The **Request New Supplier** dialog appears
-Enter the name of the supplier/payee and click submit

usertest.sciquest.com/apps/Router/SupplierRequestResponseInstructions?RequestId=1180986&tmstmp=1759251394182

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All ▾ | Search (Alt+Q) | 0.00 USD 🛒

Suppliers ▸ Requests ▸ My Supplier Requests

My Supplier Requests

Highland Beach Inc

Template	Request to Invite New Supplier or Payee to Onboard in UD Exchange
Request Status	Incomplete

Instructions

Questions ✓

Requester Contact Inform…

Review and Complete

Supplier Request Workflow

Instructions

Prior to completing this form, search for the supplier to see if they are already registered in UD Exchange:

- Active suppliers are indicated by a green check mark and the words "Active" or "Active for Shopping." They do not need to be invited to
- If new or updated information is needed for an active supplier record, the supplier can submit their own changes through the supplier p
- Inactive suppliers are indicated by a red "X" and the word "Inactive". Please contact Procurement to request that they be reactivated (p

If no Supplier record is found, please complete all information requested on this form. Procurement will review, and will send an onboarding i once approved. The supplier will then need to register for secure access to the UDX supplier portal, and provide information including legal ta addresses, payment method, and also upload current W-9/W-8 tax forms.

Once submitted, you can track the progress of your request from your UDX profile. Please see the job aid available here.

Once the supplier has completed registration, Procurement reviews all information and if approved, the supplier will be enabled for "shopping.

Please note that the term "supplier" or "vendor" in used in both UD Exchange and PeopleSoft as a descriptor for any individual or entity receivi Procurement, including individuals and others receiving honoraria, reimbursements, stipends, awards, and other non-purchase related disburs

This onboarding process replaces the previous utilization of the online UD substitute W9, and IRS W8/SDC form collection processes. Moving required to register though the UDX Supplier Portal to do business with UD. Over the next few months, in a phased approach, Procurement wi existing active suppliers requesting that they create their portal access credentials.

Next ›

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The *Instructions* page will appear, instructing you to check if the supplier is already onboarded in UDX.

If the supplier is already onboarded and **ACTIVE**, **do not proceed** with a Supplier Request Form.

- **Instruct the supplier to login into the Supplier Portal to make updates.** If the supplier is Active and does not have a supplier portal account or is unsure, the department or Supplier may contact procurement@udel.edu to request an invitation.

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My Supplier Requests

Snickers Inc.

Template — **Request to Invite New Supplier or Payee to Onboard in UD Exchange**

Request Status — **Incomplete**

Instructions
Questions ✓
Requester Contact Inform...
Review and Complete

Supplier Request Workflow

Questions - Required Details for Supplier Invitation

🖶 Print Request | History | ?

▾ On This Page
Supplier Information (1)
Contact Information (6)
Business Description & Justification (1)
Procurement Use Only (1)

▾ Supplier Information

Supplier Name * ❓
Snickers Inc.

▾ Contact Information

First Name *
[   ]

Last Name *
[   ]

Title
[   ]

Email Address *
[   ]

Phone

★ Required   ‹ Previous   Save Progress   Next ›

Contact Information
-Enter the supplier contact who should receive the registration invitation. You may wish to notify this contact in advance that an invite will be sent to them. Click here for sample email (optional).

The **First Name**, **Last Name** and **Email Address** are required fields for Procurement to send an invitation to register. Title, Phone and Website URL are optional.

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Title

CEO

Email Address *

udprocurement+snickers@gmail.com

Phone

888-888-8888

Web Site URL

http://snickers.com

Business Purpose & Description
Enter a brief explanation of why the supplier/payee is being onboarded.

*If applicable, also include the commodity or type of goods/services they will provide.

Click **Save Progress** or **Next** to Continue

▾ **Business Purpose & Description**

Enter a brief explanation of why the supplier/payee is being onboarded. If applicable, also include the commodity or type of goods/services they provide.

Business Description * ❓

department is providing candy gifts for an event; they provide delicious chocolate bars

2413 characters remaining

▾ **Procurement Use Only**

This area to be used by procurement staff only when reviewing the form.

Comments by PROCUREMENT STAFF only

2000 characters remaining

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usertest.sciquest.com/apps/Router/SupplierRequestResponseContactInformation?RequestId=1180986&tmstmp=1759251724187

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All ▾ | Search (Alt+Q) | 0.00 USD 🛒

Suppliers ▸ Requests ▸ My Supplier Requests

My Supplier Requests

Highland Beach Inc

Template	**Request to Invite New Supplier or Payee to Onboard in UD Exchange**
Request Status	**Incomplete**

Instructions

Questions ✔

Requester Contact Infor...

Review and Complete

Supplier Request Workflow

Requester Contact Information   🖨 Print Request | History | ?

Requester Name: Shannon Shopper

Requester Email: wscraven@udel.edu

Requester Phone Number: None

Requester Department: ANIMAL AND FOOD SCIENCES (02150)

This information defaults to the UDX Requester Details

Click **Next** to continue

‹ Previous   Next ›

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usertest.sciquest.com/apps/Router/SupplierRequestResponseReview?RequestId=1180690&tmstmp=1759186630639

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Suppliers ▸ Requests ▸ My Supplier Requests

My Supplier Requests

LunchTime Inc

Template	**Request to Invite New Supplier or Payee to Onboard in UD Exchange**
Request Status	**Incomplete**

Instructions

Questions ✔

Requester Contact Inform...

Review and Complete

Supplier Request Workflow

Review and Complete

🖨 Print Request   History   ?

✔ Required fields complete

Section	Progress	
Instructions	✅	No Required fields
Questions	✅	Required fields complete
Requester Contact Information	✅	No Required fields

Certification

☑ I certify that the statements and information in this request are true and correct to the best of my knowledge and belief.

★ Required

‹ Previous   Complete Request

Confirm   ✕

Are you sure you are ready to complete your new supplier request?

Yes   No

Certification
-Click the certification box and the **Complete Request** button
-A pop up will appear asking you to *Confirm* your new supplier request. Click **Yes**.

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After submitting your Supplier Request Form, the page **My Supplier Requests** will appear. This will show all Supplier Request Forms submitted by you and the status of each.

Supplier Onboarding Tracking
The "**Request Status**" filter can be used to track your supplier requests and registration process. *Check* all status' if you wish to see all of your Supplier Request Forms.

Request Status Key
Incomplete: The request has been started but not submitted
Under Review: The request is being reviewed by the supplier team
Returned/Rejected: The request was not approved either because the supplier was a duplicate or another documented reason
Approved: An invitation to self-register has been sent to the supplier

When your Request is **Approved**

My Supplier Requests

▼ Filter Supplier Requests

Requested Supplier, Template Name [🔍]

Request Status *
☑ Approved   ☑ Incomplete   ☑ Rejected
☑ Returned   ☑ Under Review   ☑ Completed

Include public Supplier request form? ☐

[Apply]

◄ ❬ Page 1 of 2   1-10 of 16 Results

Requested Supplier △	Template △	Request Status △	Workflow Step △	Workflow Assignee	Status Last Updated ▼	Created △	Supplier Profile	Registration Status
🔒 Snickers Inc.	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Approved	–	–	11/13/2025 8:04 PM	11/13/2025 7:29 PM	Snickers Inc.	None
🔒 Supplier Team Changes	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Approved	–	–	11/12/2025 8:44 AM	11/11/2025 11:12 AM	Supplier Team Changes	None
🔒 Email Only	TEST Form	Approved	–	–	11/11/2025 10:31 AM	11/11/2025 10:30 AM	Email Only	In Progress
🔒 Custom Fields Only							...om Fields	None

> You will receive an email if your request is Approved.
>
> You will also receive an email and UDX notification every time the status of your request changes.

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RE: Form Request Workflow for Snickers Inc. has been Approved

Dear Amy Drag,

Your request for Snickers Inc. has been approved.

[Click here to view the request in your organization's site]

Thank You,

University of Delaware

Support Team Contact Information:

procurement@udel.edu

When Your Request is **Returned**

You will receive an email if your request is **Returned** or **Rejected**.
- Navigate to "My Supplier Requests".
- Click on the supplier name then click on the **History** link in the top right corner.
- A pop-up will appear and you can see **"Notes"** explaining why your request was returned.
- If Returned, make the correction and resubmit

After Your Request is **Approved**

-Once your request is approved, the Supplier will receive a registration email from udexchange@jaggaer.com. At this point, the Supplier can begin the registration process.

*If the supplier already has a Jaggaer account (e.g. for another university), the same login information will allow them to access the portal, but they must still register within the UD branded portal.

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Supplier Invitation for University of Delaware

Dear Highland Beach Inc,

University of Delaware has invited you to register as a potential supplier. Our supplier network is a best-in-class Supplier Registration and eProcurement system that provides a one-stop, complete solution for buyer and supplier interaction.

Becoming a University of Delaware network supplier is free, easy and it only takes a few minutes to join. By selecting the "Register Now" button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have access to your secure portal where you can add additional details about your organization, invite colleagues to become users in your site, and more.

Register Now

Thank You,

University of Delaware

Lets see what this looks like

If you have any technical questions, please contact procurement@udel.edu or for assistance and identify yourself as registering in the University of Delaware Supplier Network.

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usertest.sciquest.com/apps/Router/ManageSupplierRequests?tmstmp=1759231550368

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Suppliers ▸ Requests ▸ My Supplier Requests

My Supplier Requests

▾ Filter Supplier Requests

Requested Supplier, Template Name

Request Status *
☑ Approved ☑ Incomplete ☑ Rejected
☑ Returned ☑ Under Review ☑ Completed

Include public Supplier request form? ☐

Apply

◄ ► Page 1 of 2 | 1-10 of 15 Results

Requested Supplier	Template	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Supplier Profile	Registration Status
🔒 Sunrise Cafe	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Approved	–	–	9/30/2025 6:44 AM	9/30/2025 6:19 AM	Sunrise Cafe	In Progress
🔒 Unbelievable Inc	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Returned	–	–	9/29/2025 1:25 PM	9/29/2025 1:22 PM	–	–
🔒 Bike Tours Inc	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Incomplete	–	–	9/28/2025 4:02 PM	9/28/2025 4:02 PM	–	–
🔒 Bike Tours Inc	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Approved	–	–	9/28/2025 3:57 PM	9/28/2025 3:55 PM	Bike Tours Inc	In Progress
🔒 Local Summer Brewery	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Returned	–	–	9/28/2025 3:42 PM	9/28/2025 3:38 PM	–	–
🔒 Lilly Vernon	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Under Review	Supplier Request Approval	–	9/24/2025 7:37 PM	9/24/2025 7:34 PM	–	–
🔒 Main Street Toys	Request to Invite New Supplier or Payee to Onboard in UD	Incomplete	–	–	9/24/2025 7:32 PM	9/24/2025 7:32 PM	–	–

You can check the Supplier's **Registration Status** from the same place you track the **Request Status** or by looking up the Supplier by name

Suppliers→ Requests→ My Supplier Requests

Registration Status
None: Supplier not yet invited to register
Invited: Invitation has been sent to the supplier but they have not started the registration process
In Progress: Supplier created a portal account but has not completed registration
Complete: Supplier has submitted their registration and it is under review by the supplier team
Approved: Supplier is registered and supplier team has approved and activated for shopping

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What Happens During the
Supplier Registration Process?

- Once the supplier completes their registration—including all required fields and their W-9 or W-8—the submission is routed to the Procurement Supplier Team for review.

- The Supplier Team verifies all submitted information, including tax documentation and banking details, and screens for any supplier-related sanctions or restrictions.

- If additional information is needed, the Supplier Team will contact the supplier directly via email sent from UDX.

- You can monitor the supplier's registration status in the same location where you track your request status: **Shopping Home→ Suppliers→ Requests→ My Supplier Requests**. You will also receive email notifications whenever the supplier's registration status changes.

Questions:

- procurement@udel.edu

Resources:

- Procurement Services Website
- NPOP Matrix
- Completing the Bulk Supplier Request Form
- Sample Email for Suppliers