New Supplier Approval Decision Tree

The following decision tree should be used to evaluate whether a new supplier should be approved upon user request.

Should a New Supplier be approved?

Is the Supplier the sole source for the identified goods or services?
Sole source means there is not another company that provides similar goods and/or services to the requested purchase; the goods or services have differentiation that make it unique in design, performance or use specifications.
Validate with Requester who must provide justification that Supplier is sole source.

Yes

No

Is there an internal Supplier that can provide this good or service?
Search List of Internal Suppliers

Yes

Use Internal Supplier

No

Is there an internal Supplier that can provide this good or service?
Search List of Internal Suppliers

Yes

Use Internal Supplier

No

Do we already have a contracted Supplier that can provide this good or service?
Search Contract Book. Consult with your Service Center

Yes

Use Contracted Supplier

No

Do we already have an existing registered Supplier in Workday that can provide this good or service at roughly the same or lower price?
Contact your Service Center. Service Center users can contact the Sourcing team.

Yes

Use Registered Supplier

No

Can we make the purchase with a PCard? Must answer YES to all of the following:
1) The Supplier will accept PCard
2) This is an infrequent purchase
3) The purchase is under the bid limit ($75,000 for goods or services)
Validate with Requester and Supplier.

Review PCard Policy

Yes

Use PCard

No

Can we make the purchase with a PCard? Must answer YES to all of the following:
1) The Supplier will accept PCard
2) This is an infrequent purchase
3) The purchase is under the bid limit ($75,000 for goods or services)
Validate with Requester and Supplier.

Review PCard Policy

Yes

Use PCard

No

Can this purchase be competitively bid?
Review RFx Preparation Form
Review Strategic Sourcing Process

Yes

Contact the Sourcing Team

No

Does the Requisition include the Waiver of Competitive Bidding Request Form (Bid Waiver), Justification Memo and if needed, President’s Cabinet Approval?
Review Instructions for Completing a Request for Waiver of Competitive Bidding
Requester should complete Request for Waiver of Competitive Bidding

Yes

Inform Requestor that Bid Waiver information must be submitted before New Supplier can be approved

No

Approve New Supplier

Yes