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?
- Yes: Validate with Requester who must provide justification that Supplier is sole source.
- No: Is there an internal Supplier that can provide this good or service?
  - Yes: Search List of Internal Suppliers
  - No: Do we already have a contracted Supplier that can provide this good or service?
    - Yes: Search Contract Book. Consult with your Service Center
    - 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?
      - Yes: Contact your Service Center. Service Center users can contact the Sourcing team.
      - 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)
        - Yes: Review PCard Policy
        - No: Is the purchase over the bid limit ($75,000)?
          - Yes: Can this purchase be competitively bid?
            - Yes: Review RFx Preparation Form
              - No: Review Strategic Sourcing Process
            - No: Does the Requisition include the Waiver of Competitive Bidding Request Form (Bid Waiver), Justification Memo and if needed, President’s Cabinet Approval?
              - Yes: Review Instructions for Completing a Request for Waiver of Competitive Bidding
              - No: Requester should complete Request for Waiver of Competitive Bidding
              - No: Inform Requestor that Bid Waiver information must be submitted before New Supplier can be approved
          - No: Approve New Supplier

Use Internal Supplier

Use Contracted Supplier

Use Registered Supplier

Use PCard

Contact the Sourcing Team

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