Determined when a Purchase Order or a Contract is Needed Decision Tree

Department determines a need to purchase a good or service.

- Is the vendor on the list of Approved Food Providers List?
  - Yes → See the Independent Contractor Decision Tree
  - No → Is there a current agreement negotiated & approved by Procurement or OGC?
    - Yes → Submit Contract Request with vendors agreement or desired terms within Agiloft CMS
    - No → Are you hiring an individual?
      - Yes → See the Independent Contractor Decision Tree
      - No → Is this for equipment with a value greater than $5,000?
        - Yes → Fixed Asset: Purchase Order always Required
        - No → Is the aggregate annual financial commitment $10,000 or greater?
          - Yes → Sourcing/Competitive Bid Required
          - No → Is this purchasing goods bearing Dartmouth Trademark Name and Logos?
            - Yes → Submit Contract Request with vendors agreement or desired terms within Agiloft CMS
            - No → Is this any of the following Defined Risk category?
              - Yes → Submit Contract Request with vendors agreement or desired terms within Agiloft CMS
              - No → Purchase Order Required - Submit Purchase Request eForm or eProcurement Purchase Requisition

Relevant Policies
- Business Expense Policy
- Purchase Order (PO) Policy
- Sole Source/Competitive Bid Policy
- Plant/Property & Equipment Policy
- Dartmouth Information Security Policy

Providers List

- Food providers for Dartmouth functions
- Construction - any design or construction work related to Dartmouth facilities.
- Travel and Transportation - hiring buses and other group off-campus trips.
- Information Technology/Financial Services - typically involve access to personally identifiable information (PII), protected health information (PHI), financial data or other Dartmouth confidential and/or proprietary information.
- Environmental Services - radioactive or hazardous waste management.
- Intellectual Property - any transaction in which the College will receive intellectual property rights (typically copyrights or patents) in the goods or services provided.