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Process: Vendor Approval Workflow

WN Edited 6 weeks ago by **Winona Nakai, Finance Ops**

This page walks through the full vendor approval process, from initial request to purchase order. Every new vendor engagement, whether software, services, or contractors, needs to go through this workflow before any spend is committed.

Approval steps

1. Submit the vendor request form, including estimated annual spend
2. Finance reviews for budget impact (2 to 3 business days)
3. Security reviews for data handling, if the vendor touches customer data
4. Once both approve, procurement issues the PO

> Estimated annual spend determines the review path. Requests under $5,000 skip the security review unless customer data is involved.

Roles and responsibilities

ROLE	RESPONSIBLE FOR
Requester	Submitting the form with accurate spend estimate and vendor contact
Finance Ops	Budget impact review, PO issuance
Security	Data handling review when customer data is in scope
Procurement	Contract terms and final vendor setup

Escalation and exceptions

SITUATION	WHAT HAPPENS
Urgent, time-boxed need	Requester can flag "expedited" on the form, Finance targets same-day review for spend under $2,000
Vendor already used elsewhere	Check the preferred vendor list first, existing approved vendors skip the security step
Review stalled past 5 business days	Escalate directly to Winona Nakai in #finance-ops

Related: **Vendor Request Form** · **Preferred Vendor List** · **Data Classification Policy**

8 likes 3 comments

Kai Tsosie · 5 weeks ago
Does the expedited flag apply to contractor engagements too, or just software?

Winona Nakai · 5 weeks ago
Applies to both, same $2,000 threshold either way.

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