

Procurement Change Order

Request and Approvals

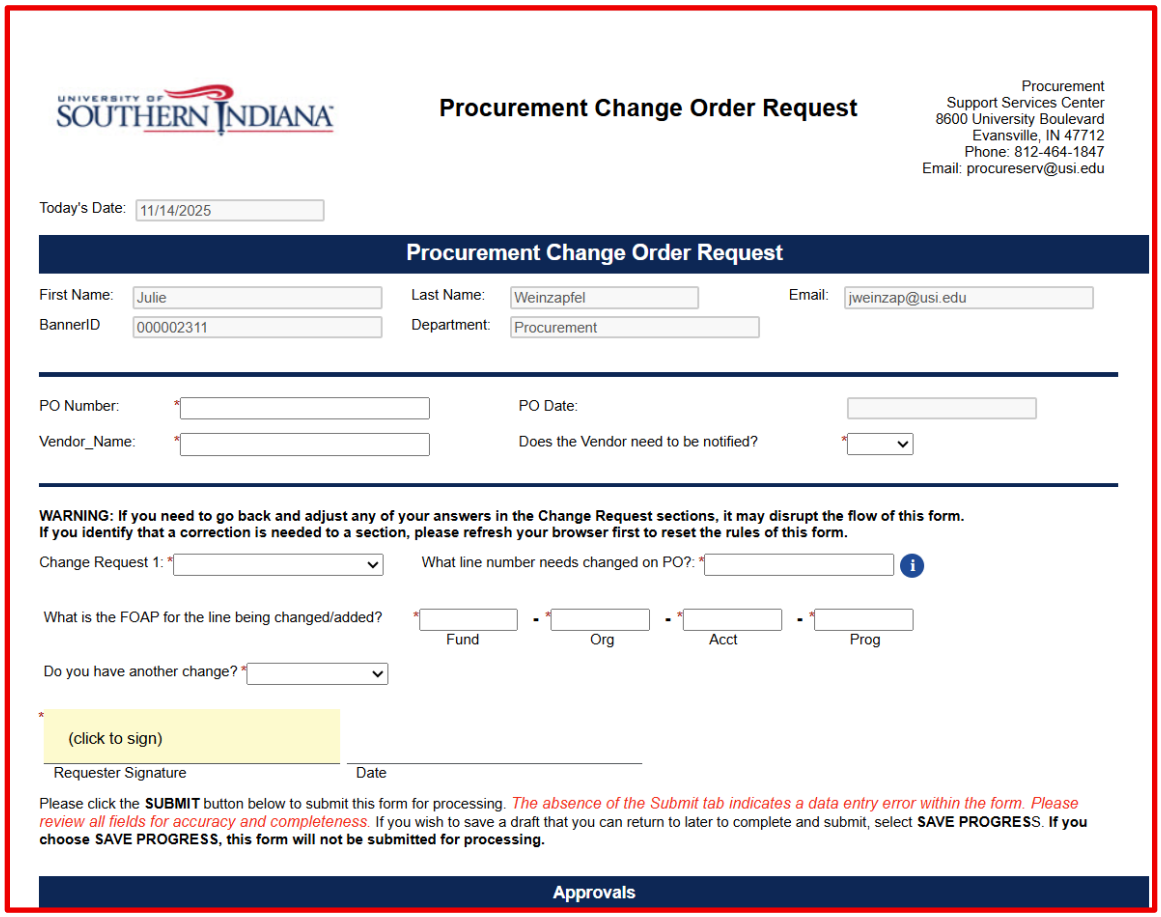
Process Guide

✅ Step 1: Submit Change Order Request

Who:
Original Requestor

Action:
Fill out the **Change Order Request Form using this link:**

Link: [This is the link to access the change order request fomr]



UNIVERSITY OF SOUTHERN INDIANA

Procurement Change Order Request

Procurement
Support Services Center
8600 University Boulevard
Evansville, IN 47712
Phone: 812-464-1847
Email: procureserv@usi.edu

Today's Date: 11/14/2025

Procurement Change Order Request

First Name: Julie | Last Name: Weinzapfel | Email: jweinzap@usi.edu
BannerID 000002311 | Department: Procurement

PO Number: * | PO Date:
Vendor_Name: * | Does the Vendor need to be notified? *

WARNING: If you need to go back and adjust any of your answers in the Change Request sections, it may disrupt the flow of this form. If you identify that a correction is needed to a section, please refresh your browser first to reset the rules of this form.

Change Request 1: * | What line number needs changed on PO?: *

What is the FOAP for the line being changed/added? * Fund - * Org - * Acct - * Prog

Do you have another change? *

* (click to sign)
Requester Signature | Date

Please click the **SUBMIT** button below to submit this form for processing. *The absence of the Submit tab indicates a data entry error within the form. Please review all fields for accuracy and completeness.* If you wish to save a draft that you can return to later to complete and submit, select **SAVE PROGRESS**. **If you choose SAVE PROGRESS, this form will not be submitted for processing.**

Approvals

Details Required:

- PO Number
- Vendor's Email (if they need a copy)
- PO Line Number to change.
- Dollar Amount to change
- Clear description of the change
- Justification documentation
- FOAP(s) – full account string(s)
- Total dollar amount

Notes:

- Ensure the PO has not been closed in a previous fiscal year **as Banner does not allow closed POs to be reopened in this scenario.**
- For standing orders, increase the encumbrance to accommodate future billing through the end of the fiscal year.

What Happens Next:

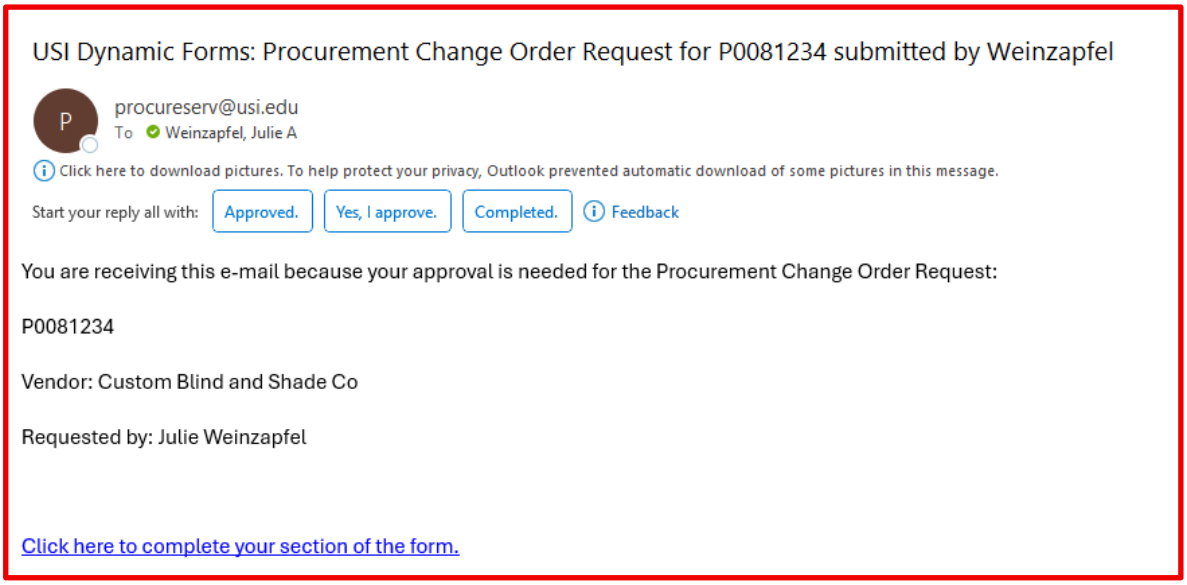
- Requestor signs electronically
- Clicks the "Submit" tab at the bottom of the form.
- Form is auto routed to **Procurement Department**

Step 2: Procurement Review/Approval

Who:
Manager of Procurement Operations

Action:

- System generated email notification is received notifying of a change request:



- Review for completeness, compliance, and FOAP details
- Approve or deny the request

✅ **If Approved:**

- Signed electronically by Manager of Procurement Services
- Clicks the “Submit” button at the bottom of the form.
- Auto-routed to **Financial Manager (FM)** of the FOAP(s) listed.

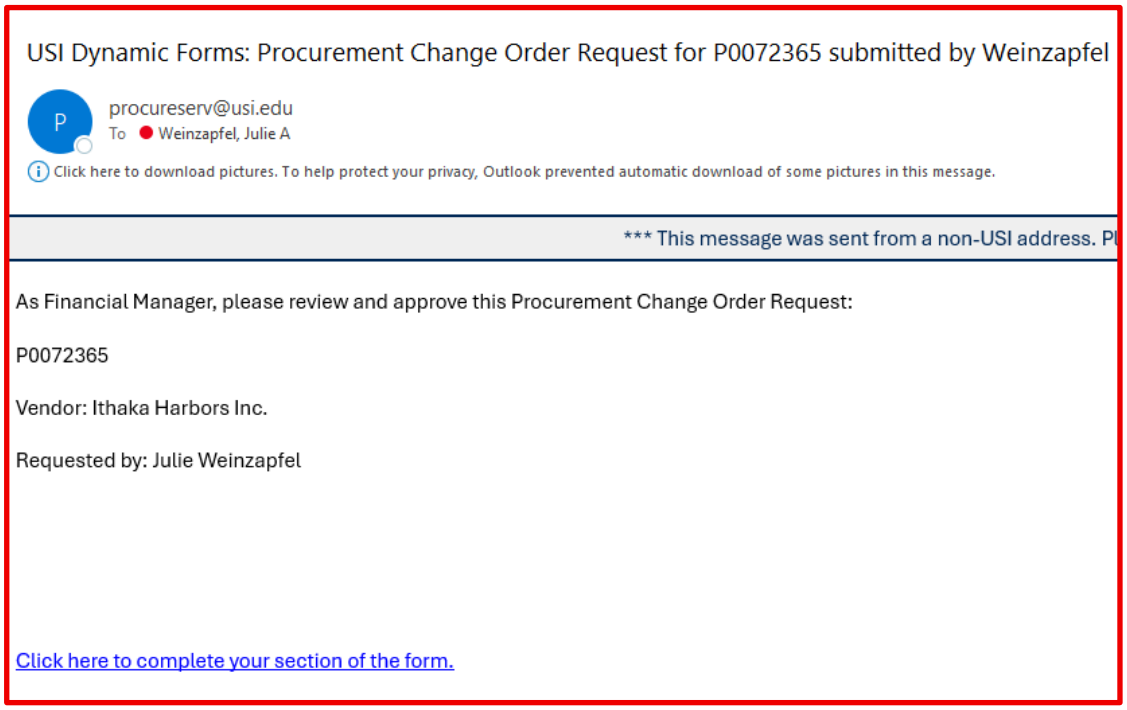
❌ **If Denied:**

- Denial reason added in the form
- Requestor is notified via system generated email.
- Procurement Buyer is notified via system generated email.
- Request is archived in portal by Procurement Buyer
- **No further action is taken for this change order request.**

📝 Step 3: Financial Manager Review / Approval

Who:
Financial Manager(s) for the FOAP(s)

Action:
System generated email notification is received notifying of a change request:


USI Dynamic Forms: Procurement Change Order Request for P0072365 submitted by Weinzapfel

P

procureserv@usi.edu
To Weinzapfel, Julie A

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

*** This message was sent from a non-USI address. Pl

As Financial Manager, please review and approve this Procurement Change Order Request:

P0072365

Vendor: Ithaka Harbors Inc.

Requested by: Julie Weinzapfel

Click here to complete your section of the form.

- Review for completeness, compliance, and FOAP details
- Approve or deny the request.

✅ **If Approved:**

- If **≤ $5,000**: Skip to **Step 5**
- If **> $5,000**: Routed to **Director of Procurement**

❌ **If Denied:**

- Denial reason added in the form and form is submitted.
- Requestor is notified via system generated email.
- Procurement Buyer is notified via system generated email.
- Request is archived in portal by Procurement Buyer
- **No further action is taken for this change order request.**

Notes:

- Once one FM opens the approval email, it becomes inaccessible to others. Departments should determine in advance who will take action on change orders.
- Review the change order form carefully — Procurement may recommend an adjustment to the original amount. The approval should reflect the ***recommended*** amount.
- Financial Manager's approval indicates full agreement with the requested changes.

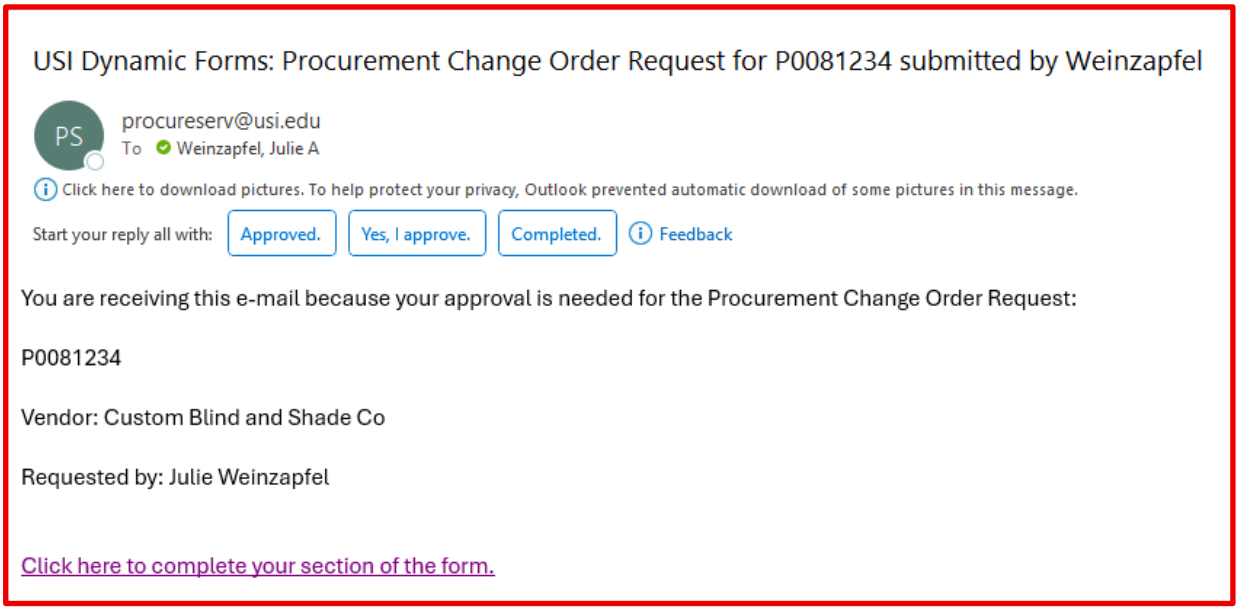
📝 Step 4: Director of Procurement Review / Approval *(Only for requests > $5,000)*

Who:
Director of Procurement (DOP)

- **Action:** System generated email notification is received notifying of a change request:

- Verifies high value requests.

- Final review and approval



✅ **If Approved:**

- Auto-routed to **Procurement Buyer** (Step 6)

❌ **If Denied:**

- Denial reason added in the form
- Requestor is notified via system generated email.
- Procurement Buyer is notified via system generated email.
- Request is archived in portal by Procurement Buyer
- **No further action is taken for this change order request.**

📝 Step 5: Notifications Sent

Who Receives Notifications:

- **Requestor** – receives system generated email stating that all approvals are complete and that the change will be entered into Banner shortly.

- **Procurement Buyer** – receives system generated email stating that all approvals are complete.

📝 Step 6: Change Order Entered in Banner

Who:
Procurement Buyer

Action:

- Enter the approved change in **Banner.**
- Change order is automatically indexed
- Mark the request as **Complete** in the portal

🔁 End of Process

📬 Email Notifications

Automatic notifications are sent at key points:

- Procurement for initial review and approval
- Financial Manager(s) of FOAP(s)
- Director of Procurement (as needed) for approval for requests over $5000.
- Requestor when approvals are complete.
- Requestor and Procurement Buyer when denied.
- Procurement Buyer when all approvals are received.

💡 Tips for Success

- Double-check all FOAP(s) for accuracy.
- Attach all relevant justification documentation.
- **Review carefully before submitting / Approving.**
- Review all information for completeness to avoid delays.
- **Approvals indicate full agreement with the requested changes.**

🛠️ Troubleshooting & Support

Contact IT via Support Ticket
