



**Procurement Change Order  
Request and Approvals  
Process Guide**

## ✓ Step 1: Submit Change Order Request

### Who:

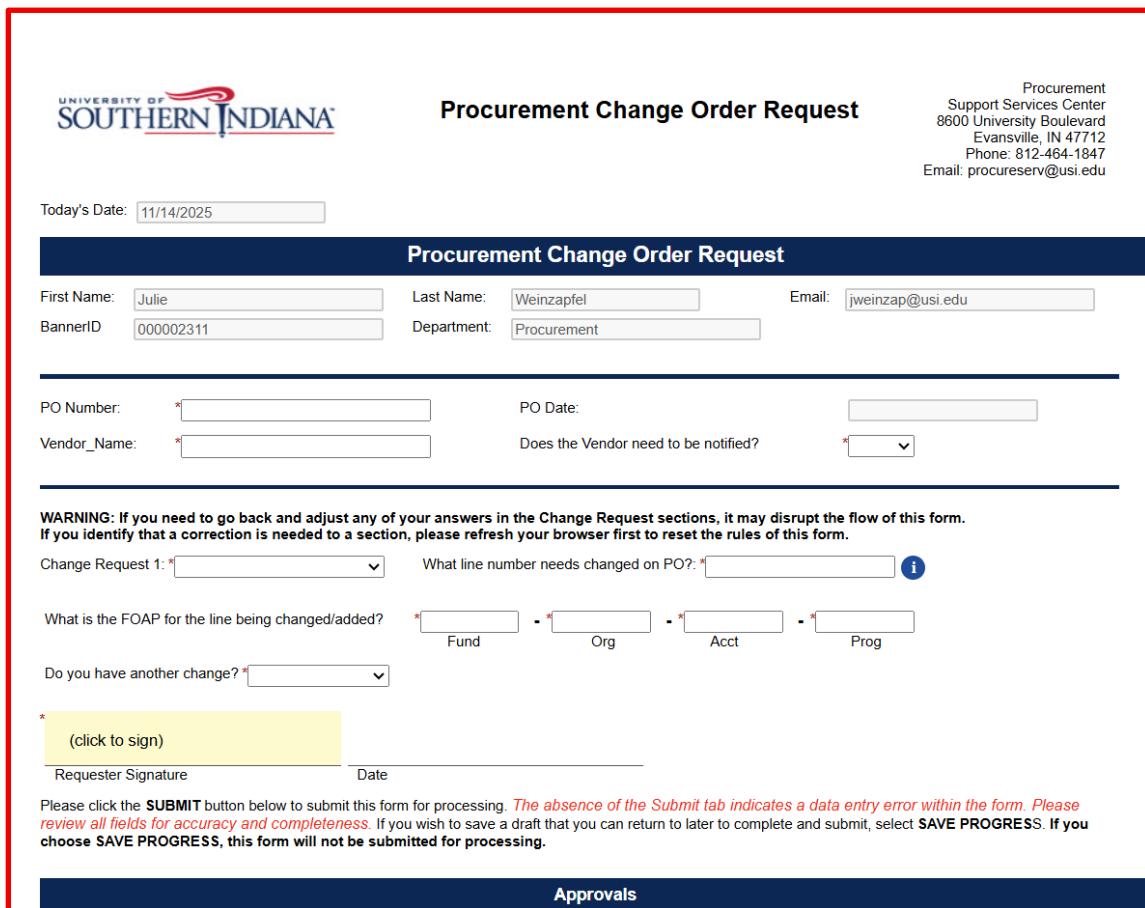
Original Requestor

### Action:

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

### Link:

<https://federation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=http://weblogin.usi.edu/exkp3n3k53s5ffvvx4x7&SpSessionAuthnAdapterId=usiDF&TargetResource=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2ff655641d-e7e1-4220-b66e-7ee0c1198b49>



The screenshot shows the 'Procurement Change Order Request' form. At the top left is the University of Southern Indiana logo. To the right is contact information for the Procurement Support Services Center. The form has several input fields: 'First Name' (Julie), 'Last Name' (Weinzapfel), 'Email' (jweinzap@usi.edu), 'BannerID' (000002311), and 'Department' (Procurement). Below these are fields for 'PO Number' and 'PO Date'. There is a section for 'Vendor Name' and 'Does the Vendor need to be notified?'. A warning message at the bottom states: '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.' The form includes a 'Change Request 1' dropdown, a line number for PO change, and a section for FOAP (Fund, Org, Acct, Prog). A 'Requester Signature' field is at the bottom with a note to 'click to sign'. A note at the bottom says: '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.' A 'Approvals' button is at the bottom.

### 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**

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## **Step 2: Procurement Review/Approval**

**Who:**

Manager of Procurement Operations

**Action:**

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

USI Dynamic Forms: Procurement Change Order Request for P0081234 submitted by Weinzapfel

 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.](#)

Start your reply all with: [Approved.](#) [Yes, I approve.](#) [Completed.](#) [Feedback](#)

You are receiving this e-mail because your approval is needed for the Procurement Change Order Request:

P0081234

Vendor: Custom Blind and Shade Co

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:**

- 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

 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. Please do not reply to this address.

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  $\leq \$5,000$ : 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.

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 **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

USI Dynamic Forms: Procurement Change Order Request for P0081234 submitted by Weinzapfel



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.](#)

Start your reply all with: [Approved.](#) [Yes, I approve.](#) [Completed.](#) [Feedback](#)

You are receiving this e-mail because your approval is needed for the Procurement Change Order Request:

P0081234

Vendor: Custom Blind and Shade Co

Requested by: Julie Weinzapfel

[Click here to complete your section of the form.](#)

**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

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## End of Process

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### 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.

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### 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.**

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### Troubleshooting & Support

Contact IT via Support Ticket

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