



Dynamic Forms

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?PartnerIdId=http://weblogin.usi.edu/ekp3n3k53s5ffvvx4x7&SpSessionAuthnAdapterId=usiDF&TargetResource=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2ff655641d-e7e1-4220-b66e-7ee0c1198b49>



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:

Procurement Change Order Request

First Name: Last Name: Email:
BannerID: Department:

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? *

*
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:

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:  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. Pl

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

P0072365

Vendor: Ithaca 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

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:  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
-



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
