Change Order Process Guidelines

*Note: Change Orders cannot exceed 25% (or $50k if applicable) per the Governing Rules. This avoids any appearances of impropriety

Change Order Type	Description	Significant Change?[C]	Affects Banner?	Additional Information	Manual Banner Entry?	Requires Full Approval?
SPCC Change Orders	Includes any Change Orders to SPCC orders	No	No	**Process change order in eVA.** -Use the below steps, always Bypass Integration.	No	Possibly
Punchout Change Orders	Includes Change Orders to punchout catalog orders	No	Yes	**Contact Procurement.** -Change orders to punchouts are limited. You can only change a qty but not a price. Adding a line item should be done as a new order.	Yes	Full Approval Required
Release Encumbrance under $100	Close Purchase Order to release encumbrance	No	Yes	**Do not process change order in eVA.** -Email Sharon Proffitt or Hunter Malcom to release encumbrance and close in Banner	Yes	N/A
Adjusting Generic "Header" Details	Includes adjustments to 'Name', 'Reference Number', 'Header Field 1', 'Header Field 2' & 'Comment' fields of header	No	No	**Process change order in eVA.** -Set Type to 'Changes Header Information' -Adjust necessary field(s). -Bypass Integration. -Submit for approval.	No	Full Approval is not Required
Adjusting Elevated "Header" Details	Includes adjustments to 'Header Organization'[E] , 'PO Category' & 'Procurement Transaction Type' fields of header	No	No	**Process change order in eVA.** -Set Type to 'Changes Header Information' -Adjust necessary field(s). -Bypass Integration. -Submit for approval.	No	Full Approval is not Required
Adjusting Critical "Header" Details	Includes adjustments to 'Requestor'[E] or 'Ship To' fields of header	Yes	Yes	**Process change order in eVA.** [D] -Set Type to 'Changes Header Information' -Adjust necessary field(s). -Bypass Integration **only** if available funds will not cover value of **Original** + **Amendment.** *See Last Page* -If Bypassed, make notation in comments and notify Procurement. -Submit for approval.	Yes	Full Approval Required

A=This field cannot be changed on Punchout Amendments
B=Any receiving done on this line must be backed out before this action can be completed

C=Significant Changes are sent to Supplier and Fire Approvals
D=This Amendment will fail integration if the PO has had any payment activity in Banner

E=Changes to this field will reset allocations
F=Lines are never removed. Zero out dollar amount and leave quantity unchanged on line and add additional line if applicable to reflect change.

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Change Order Type	Description	Significant Change?[C]	Affects Banner?	Additional Information	Manual Banner Entry?	Requires Full Approval?
Adding Line(s)	Includes creating new line(s) [A]	Yes	Yes	**Process change order in eVA.** [D] -Set <u>Type</u> to 'Add New Item(s)' -Add necessary line(s). -Bypass Integration **only** if available funds will not cover value of **Original** + **Amendment.** *See Last Page* -If Bypassed, make notation in comments and notify Procurement. -Submit for approval.	Yes	Full Approval Required
Removing Line(s) [F]	Includes deleting existing line(s) [B]	Yes	Yes	**Process change order in eVA.** [D] -Set <u>Type</u> to 'Change Existing Item(s) (quantity/price)' -Set price to "0" on necessary line(s). -Bypass Integration **only** if available funds will not cover value of **Original** + **Amendment.** *See Last Page* -If Bypassed, make notation in comments and notify Procurement. -Submit for approval.	Yes	Full Approval is not Required
Adjusting Line Details	Includes adjustments to 'Detailed Description' [A] , 'Delivery Date', 'Supplier Part #' [A] , 'Item Cross Reference', 'Additional Details', 'Product Type', 'Supplier Contact', 'Ship To', 'External Contract Number', 'Supplier Visible Comment', 'Internal Comment', 'Attachment', 'Unit of Measure' [A] , 'Commodity Code' [A] and 'Deliver To' fields of line	Yes	Yes	**Process change order in eVA.** [D] -Set <u>Type</u> to 'Change Existing Item(s) (quantity/price)' -Adjust necessary field(s). -Bypass Integration **only** if available funds will not cover value of **Original** + **Amendment.** *See Last Page* -If Bypassed, make notation in comments and notify Procurement. -Submit for approval.	Yes	Full Approval is not Required

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Decreasing Line Value(s)	Includes decreasing the 'Price' [A,B] and/or 'Quantity' of line(s)	Yes	Yes	**Process change order in eVA.** [D] -Set Type to 'Change Existing Item(s) (quantity/price)' -Decrease Price/Quantity of line(s). -Bypass Integration **only** if available funds will not cover value of **Original + Amendment.** *See Last Page* -If Bypassed, make notation in comments and notify Procurement. -Submit for approval.	Yes	Full Approval is not Required
Increasing Line Value(s)	Includes increasing the 'Price' [A,B] and/or 'Quantity' of line(s)	Yes	Yes	**Process change order in eVA.** [D] -Set Type to 'Change Existing Item(s) (quantity/price)' -Increase Price/Quantity of line(s). -Bypass Integration **only** if available funds will not cover value of **Original + Amendment.** *See Last Page* -If Bypassed, make notation in comments and notify Procurement. -Submit for approval.	Yes	Full Approval Required
Adjusting Line Allocations	Includes adjustments to 'Fund/Org', 'Account', 'Fiscal Year' & 'Splits' (Adding & Removing) allocations of line(s)	No	Yes	**Process change order in eVA.** [D] -Set Type to 'Change Allocation' -Adjust necessary allocations(s). -Bypass Integration **only** if available funds will not cover value of **Original + Amendment.** *See Last Page* -If Bypassed, make notation in comments and notify Procurement. -Submit for approval.	Yes	Full Approval Required

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Adjusting Order Internal Attachment(s)	Includes adding, deleting or editing 'Internal Attachments' (Name, Description & File)	No	No	**Process change order in eVA.** -Set <u>Type</u> to 'Generic Change'. -Attach or remove attachment(s). -Bypass Integration. -Submit for Approval.	No	Full Approval is not Required
Adjusting Order Internal Comment(s)	Includes adding, deleting or editing 'Internal Comments'	No	No	**Process change order in eVA.** -Set <u>Type</u> to 'Generic Change'. -Add, edit or remove Internal Comment(s). -Bypass Integration. -Submit for Approval.	No	Full Approval is not Required
Adjusting Order Supplier Attachment(s)	Includes adding, deleting or editing 'Supplier Attachments' (Name, Description & File)	Yes	No	**Process change order in eVA.** -Set <u>Type</u> to 'Generic Change'. -Attach or remove attachment(s). -Bypass Integration. -Submit for Approval.	No	Full Approval is not Required

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*NOTE: Budgets are adjusted to the correct encumbrance once the purchase order fully integrates into Banner. On the initial submission of the requisition, Banner sees the requisition as a new order and encumbers the full amount. If funds are not available to encumber this full amount plus the change, the order will fail on budget.

Important- Always identify an invoice or receipt as "Final Pay" to release all existing encumbrances!