## Change Order Process Guidelines

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

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<tr>
<th>Change Order Type</th>
<th>Description</th>
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<tbody>
<tr>
<td>SPCC Change Orders</td>
<td>Includes any Change Orders to SPCC orders</td>
<td>No</td>
<td>No</td>
<td>Process change order in eVA. -Use the below steps, always Bypass Integration.</td>
<td>No</td>
<td>Possibly</td>
</tr>
<tr>
<td>Punchout Change Orders</td>
<td>Includes Change Orders to punchout catalog orders</td>
<td>No</td>
<td>Yes</td>
<td>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.</td>
<td>Yes</td>
<td>Full Approval Required</td>
</tr>
<tr>
<td>Release Encumbrance under $100</td>
<td>Close Purchase Order to release encumbrance</td>
<td>No</td>
<td>Yes</td>
<td>Do not process change order in eVA. -Email Sharon Proffitt or Hunter Malcom to release encumbrance and close in Banner</td>
<td>Yes</td>
<td>N/A</td>
</tr>
<tr>
<td>Adjusting Generic &quot;Header&quot; Details</td>
<td>Includes adjustments to 'Name', 'Reference Number', 'Header Field 1', 'Header Field 2' &amp; 'Comment' fields of header</td>
<td>No</td>
<td>No</td>
<td>Process change order in eVA. -Set Type to 'Changes Header Information' -Adjust necessary field(s). -Bypass Integration. -Submit for approval.</td>
<td>No</td>
<td>Full Approval is not Required</td>
</tr>
<tr>
<td>Adjusting Elevated &quot;Header&quot; Details</td>
<td>Includes adjustments to 'Header Organization', 'PO Category' &amp; 'Procurement Transaction Type' fields of header</td>
<td>No</td>
<td>No</td>
<td>Process change order in eVA. -Set Type to 'Changes Header Information' -Adjust necessary field(s). -Bypass Integration. -Submit for approval.</td>
<td>No</td>
<td>Full Approval is not Required</td>
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<tr>
<td>Adjusting Critical &quot;Header&quot; Details</td>
<td>Includes adjustments to 'Requestor' or 'Ship To' fields of header</td>
<td>Yes</td>
<td>Yes</td>
<td>Process change order in eVA. -Set Type to 'Changes Header Information' -Adjust necessary field(s). -Bypass Integration only if available funds will not cover value of Original + Amendment. <em>See Last Page</em> -If Bypassed, make notation in comments and notify Procurement. -Submit for approval.</td>
<td>Yes</td>
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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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| Adding Line(s)    | Includes creating new line(s) A | Yes | Yes | Process change order in eVA. D  
- Set Type 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 Type 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 Type 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 |

**Notes:**
- **A**=This field cannot be changed on Punchout Amendments  
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  - **C**=Significant Changes are sent to Supplier and Fire Approvals  
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<tr>
<td>Adjusting Order Internal Attachment(s)</td>
<td>Includes adding, deleting or editing 'Internal Attachments' (Name, Description &amp; File)</td>
<td>No</td>
<td>No</td>
<td>Process change order in eVA. Set Type to 'Generic Change'. Attach or remove attachment(s). Bypass Integration. Submit for Approval.</td>
<td>No</td>
<td>Full Approval is not Required</td>
</tr>
<tr>
<td>Adjusting Order Internal Comment(s)</td>
<td>Includes adding, deleting or editing 'Internal Comments'</td>
<td>No</td>
<td>No</td>
<td>Process change order in eVA. Set Type to 'Generic Change'. Add, edit or remove Internal Comment(s). Bypass Integration. Submit for Approval.</td>
<td>No</td>
<td>Full Approval is not Required</td>
</tr>
<tr>
<td>Adjusting Order Supplier Attachment(s)</td>
<td>Includes adding, deleting or editing 'Supplier Attachments' (Name, Description &amp; File)</td>
<td>Yes</td>
<td>No</td>
<td>Process change order in eVA. Set Type to 'Generic Change'. Attach or remove attachment(s). Bypass Integration. Submit for Approval.</td>
<td>No</td>
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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!