Approval of Electronic Change Orders

Process Flow
Change orders are used to make changes to a purchase order to add, delete or cancel. Common changes include increasing the amount ordered or cost, decreasing the amount ordered or cost, cancelling the order. These are the change orders that will require review and approval.

**Note:** Subcontracts, Construction and Architectural Engineering (AE) types of changes will not use this Electronic Change Order process. Continue to use the established routing process. For Subcontracts, these should be routed to Sponsored Projects Accounting and Construction and AE should be routed to Office of Facilities Services.

The Electronic Change Order will utilize the same routing approval as a Purchase Requisition. The Commodity field will identify the “Electronic Change Order” and the Document Text will list the reason and exact specifics for the change order.

The approval process can be completed in one of two ways, using the Banner Finance module or Finance Self-Service Steps for both will be addressed in this document.

**Note:** To make a fund change for an Index (indices) or Account Code(s) continue to use the paper form Purchase Order - Fund Change provided on-line and can be found by going to link [http://www.nmsu.edu/~boffice/forms/PSRM_PurchaseOrderFundingChangeRequest.pdf](http://www.nmsu.edu/~boffice/forms/PSRM_PurchaseOrderFundingChangeRequest.pdf)
**Electronic Change Order Approval using Banner Finance Module**

Change orders that include monetary changes (increases, decreases, or cancellations) are submitted using the purchase requisition process.

**Approve/ Disapprove Using FOAUAPP form**

The User Approval form, FOAUAPP allows direct approval of a document or navigation to summary information of a document for review and subsequent approval. Use the User Approval Form to obtain an online list of unapproved documents by document type.

To access the **User Approval** form, type **FOAUAPP** in the Direct Access **Go To...** field and press the **Enter** key.

The **User Approval** form will be displayed.

1. Click the **Next block** to display list of all requisitions needing approval.
2. Click on **Detail** icon.
The **Requisition Approval [FOQFACT]** form will be displayed.

![Requisition Approval Form](image)

3. Within the Line Item Information block; the **Commodity** field will displays **Electronic Change Order**. This identifies a Change Order versus a Purchase Requisition.
4. From the **Options** menu select **Document Query [FPIREQN]**.
5. Click on **Next Block** icon.
6. From the **Options** menu select **Document Text [FOAPOXT]**.
7. Click on the **Next Block** icon to view text.
8. Review document text listed and ensure that the following information is listed:
   - Purchase Order number
   - Vendor
   - Increase, Decrease or Cancel
   - Reason
   - Action
   - Total Line Change (if applicable)

9. Click on **Exit** icon.
This will return you to the Purchase Requisition Query [FPIREQN] form.

10. Click on Next Block until the Requisition Inquiry: Commodity/Accounting is displayed (this may take clicking on Next Block multiple times).
11. Verify **Index** and **Account** code.
   a. The index and account code must be the same as on the original Purchase Order.
   b. To **Increase** an original order the quantity will always be one regardless of the number of items being changed. The unit price will reflect the total amount of the changes applied to the entire purchase order.
   c. To **Decrease** or **Cancel** an original order the quantity will be listed as one. The dollar amount will determine if only one FOAPAL versus multiple FOAPALs have been used. For changes to only one FOAPAL, the amount will be $1. When two FOAPALs are being used, the amount will be listed as $2.00 and so on.

12. Click on **Exit** icon.
This will return you to the **Requisition Approval [FOQRACT]** form.

13. Click on **Exit** icon.
14. Upon returning to the User Approval [FOAUAPP] form you can proceed to **Approve** or **Disapprove** requisition.

**Note:** If disapproved the Requisitions will return to the Originator queue.

15. You can proceed to review additional requisitions on the approval form.

16. Click on **Exit** icon when completed.
Electronic Change Order Approval using Finance Self-Service

Change orders that include monetary changes (increases, decreases, or cancellations) are submitted using the purchase requisition process.

Approve/Disapprove Using Finance Self-Service

To access open an internet browser and go to my.nmsu.edu.

The my.nmsu.edu Secure Access logon screen will be displayed.

1. Enter your User Name.
2. Enter your Password.
3. Click on the **Employee** tab.

4. Click on the **Banner Self-Service** folder to expand.
5. Click on the **Finance** folder to expand.

6. Click on **Approve** Documents.
7. Select radio button **All documents which you may approve**.

A list of all requisition awaiting your approval will be displayed, you will need to select the document number (Purchase Requisition) and view to determine if the requisition submitted is an Electronic Change Order.

8. Click on desired **Document “Requisition”** number.
9. Review the Document Text as this will state the reason and specific details about the Change Order.
10. Review and ensure that Document text has the following information listed;
    a. PO
    b. Vendor
    c. Increase, Decrease or Cancel
    d. Reason
    e. Action
    f. Total Line Change (if applicable)
12. The Commodity description will display “Electronic Change Order”, this is what will determine that a Purchase Requisition being process is a Change Order.
13. Verify Index and Account code number.
    a. The index and account code must be the same as on the original Purchase Order.
    b. To Increase an original order the quantity will always be one regardless of the number of items being changed. The unit price will reflect the total amount of the changes applied to the entire purchase order.
    c. To Decrease or Cancel an original order the quantity will be listed as one. The dollar amount will determine if only one FOAPAL versus multiple FOAPALs have been used. For changes to only one FOAPAL, the amount will be $1. When two FOAPALs are being used, the amount will be listed as $2.00 and so on.
14. Once requisition is reviewed, return to the previous page by using the Back arrow icon on the internet browser.
15. Select to **Approve** or **Disapprove**.
16. When finished reviewing your approval list, logout properly from my.nmsu.edu.