

 VILLANOVA UNIVERSITY	Policy: Change Order Policy
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Financial Affairs Department Procurement Department Policies and Procedures	Updated: March 1, 2017

Policy

If a change needs to be made to an existing Purchase Order, departments are required to create and submit a Change Order request through the NOVAbuy system. All change order requests will require approval within the NOVAbuy system prior to the change order being completed by the Procurement Office.

Procedures

1. Whenever the amount of the invoice is different than that of the original purchase order, a change order will need to be completed in NOVAbuy by the requesting department. There are various situations that will require a change order in NOVAbuy.
 - a. Additional goods or services are requested, the PO will be increased.
 - b. Purchase price changed from time of purchase to time of order release. PO increase or decrease.
 - c. Goods or services are cancelled, PO will be credited.
2. Once it has been determined that a Change Order is necessary, it must be requested in the NOVAbuy system. Emails to the Procurement Office will no longer be accepted.
 - a. Log into NOVAbuy and select the drop down arrow on the shop tab.
 - b. Select the Non-Catalog Item.
 - c. Enter in the Supplier/Vendor from the original PO and select Go to make the appropriate selection.
 - d. Click New Item.
 - e. In the Item/Service field, you will enter in the **Original PO#** and any pertinent information regarding the change order. Be sure to fill in quantity and the price, which should be the amount of the change order only. Positive and negative pricing is accepted.
 - f. Once all of the information has been entered, select Add to Cart.
 - g. You will notice that a number populates on the next tab which is Cart, select Cart to proceed with the Change Order.
 - h. After reviewing the items in the Cart, select Continue.
 - i. Beginning from the far left column, you will review the information such as the Transaction #, Name, Requestor, Supplier and Total Value.

- j. From the middle column, top row, select PO as the Payment Form. The release method will default so it is not necessary to touch that field.
 - k. The Order Type must be **Change Order**.
 - l. Please use the Internal Notes field to communicate any information that would help the Procurement Department process your request. *An example would be to add the PO# again, along with an explanation, the amount of the original PO and what the total would be once the change order amount is added. You can also use External Attachments and Notes for any information that should be sent to the Vendor.*
 - m. Next, you will input the Index & Expense Codes. If your change order is due to a request to change the index or account code from the original purchase order, please note that in the internal notes.
 - n. You are able to search all of the Index and Account codes by number or text, however, you will only be able to process orders based on what access you have in Banner.
 - o. Once you have selected the correct Index and Account codes, select Update and then Apply.
 - p. At this point you are able to continue adding index and account codes and split them based on percentage or dollar amount.
 - q. Select update again once you are back to the main screen. This will simply update your requisition. After it has updated, you will notice a green Request button. Click Request to submit your requisition for approval.
 - r. At this point, if everything is input correctly, the Next Step should say View Workflow. If you select View, you will be able to see exactly who has to approve or has approved your requisition before it will be sent to the vendor.
3. Once the change order has been approved by all required individuals, the Procurement Office can start the change order process.
- a. The request in NOVAbuy will be completed by Procurement
 - b. Because the order type was Change Order, it will not update with a new PO number nor will it automatically feed into Banner.
 - c. The Procurement office will go into Banner and create the change order as you requested. Notes on the change order in Banner will reference the purchase order/change order number in the NOVAbuy system.
 - d. The change order is now completed.