

CSFPF Change Order Guide

The article covers how requestors can revise their approved purchase orders (PO) amount. A revision to an approved purchase order is now considered a change order.



If a requisition needs to be revised but a purchase order has not been issued yet, requestors must reply to the confirmation email referencing the original requisition submission with the desired revisions.



You may want to have a copy of the approved purchase order to refer to while filling out the change order.

1. Click on the CSFPF ServiceNow Requisition Request located on the CSFPF website.

2. Complete the Change Order Request by ensuring the following information is provided:

REQUEST TYPES AND DETAILS

The requestor information should automatically populate based on your login information.

Click on **Change** request type. Check the following optional box if your requisition:

- Requires a deposit. A deposit amount is required once checked

VENDOR INFORMATION

Enter your assigned PO# for the purchase order you are revising. The vendor information should automatically populate based on what was inputted in the original requisition.

Request type and details

* Request type

- Change
 New

Requisition is for next fiscal year

Deposit required

* PO#

P25-0000

Found PO number P25-0000 in an existing request. Please verify vendor information populated below

Vendor Information

Vendor/Payee name

Create a Party Rental - Z1234567

Vendor email

sales@createaparty.com

Mailing address



428 Berry Way
Brea, CA 92831

Payee is an employee of the CSU system or its auxiliaries.

GOODS OR SERVICES

To edit an existing line of the requisition, click the **Add** button and add a new line in addition to the original line. For example, if a PO was issued for \$2,000 and you want to increase it by \$2,000, then add a new line item for \$2,000. For an original PO request with multiple account numbers, a new line item for each account number will be required.

Click to add a new line item for revision

Actions	Invoice number	Description/Justification	Account number	Object Code (CSFPF use)	Amount
 		Rentals for VIP Reception at the Visual Arts New Gallery Open House	12345	8120	2000.00

Add the required fields:

1. Description/Justification: New details of the PO Request requiring a Change Order
2. Account Number: Should be the same account as the original order.
3. Amount: The amount to increase the original amount by

Edit Row



Invoice number

*Description/Justification

*Account number

Object Code (CSFPF use)





*Amount

ServiceNow will now show the original line item with the original amount and the added line with the amount to increase the original amount by, and will automatically calculate a new total amount.

Under **Special Instructions** field, please indicate the amount of the increase and the revised total cost of the purchase order to ensure that it matches the newly calculated total amount.

Add

Remove All

Actions	Invoice number	Description/Justification	Account number	Object Code (CSFPF use)	Amount
 		Rentals for VIP Reception at the Visual Arts New Gallery Open House	12345	8120	2000.00
 		New rental equipment was ordered due to an increase in anticipated attendees. Increase the amount by \$2,000.00	12345		2000.00

Special Instructions

Increase PO amount by \$2,000.00. The new PO amount should be \$4,000.00

Total

4000.00



Please see the additional requirements for when your expenses exceed a certain threshold.

▼ Requirements

- Purchases of goods or services with a total value less than \$50,000 require at least one quote or an estimated price.
- Purchases of goods or services with a total value equal to or greater than \$50,000 but equal to or less than \$100,000 will require three or more information quotes from different vendors in writing. You will be prompted to upload a single PDF file of the additional quotes.
- Purchases of goods or services greater than \$100,000 will require a Formal Bid (Request for Proposal: RFP) through CSUF's Contracts & Procurement Department. Contact CSFPF for further instructions.
- Purchases of Information Technology (such as computers and software subscriptions) totaling greater than \$50,000 but equal to or less than \$500,000, three or more written quotes from different vendors are required. You will be prompted to upload a single PDF file of the additional quotes.
- Purchases of goods or services from a sole source/brand require CSUF Contracts & Procurement Authorization and approved written justification.

COMPLIANCE REVIEW

Answer the compliance review questions. Depending on your answer, you may be required to upload additional documents (IT approval, D11 approval, or vendor insurance)

- **IT Purchases:** All IT-related purchases must include an IT Authorization Number, which must be obtained in advance and submitted with the request.

- **Hospitality Expenses:** For expenses subject to CSUF Directive 11, a completed Hospitality Justification Form (D-11) is required.
- **On-Campus Approved Vendor:** If the vendor will be on campus and is an approved CSUF vendor, the most recent Approved Caterers List from e-Business should be attached.
- **On-Campus Not approved Vendor:** If a vendor is scheduled to be on campus and is not included on the approved CSUF vendor list, a valid Certificate of Insurance must be submitted. The coverage must comply with CSU insurance requirements and standards.

3. Upload supporting documentation, which may include but is not limited to valid quote, unsigned contract/agreement, and any other documentation

Attach documents in a single PDF file, which may include but are not limited to valid revised quote, unsigned contract/agreement and any other supporting documentation. Refer to requisition checklist on CSFPF website.

4. Select the appropriate approver of the account being charged.



Not sure who the appropriate approver signer is? You can view a list of signers with our [Acct Info Foundation Report](#). Add your CSFPF account number in the **GL Key/Project** field and submit for a report of account signers. The requestor cannot also be the approver.

Purchase requisitions exceeding \$3,000 will require a second approver.

5. Read and check the attestation box prior to clicking on the submit button.

Next Steps

Once the requisition request has been submitted, the requester will receive a confirmation email referencing a unique RITM number. A separate email will be sent to the authorized approver requesting their approval.

CSFPF generally requires a minimum lead-time of 15 business days to process a complete Requisition Request. However, contracts for large amounts or requiring additional approvals from other campus units (i.e., IT, C&P, etc.) may require up to 25 business days for review and approval.

Received a requisition approval from CSFPF? Refer to the [Purchase Order Payment Guide](#).

Need Help?

Additional information regarding the procurement process, please reference the CSFPF Procurement Policy on the Philanthropic Foundation website:

<http://foundation.fullerton.edu/policies-forms/>

If you have any questions, please contact the Foundation at CSFPFAP@fullerton.edu or 657-278-2786