Instructions for Routing Requisitions and Change Orders
by DLFM College/Department
For Projects with Approved Facilities Project Initiation Form (FPIF)
Using the Designated Local Facilities Manager (DLFM) Policy

Purpose

To expedite routing approvals by having:

1. Approved FPIF # in the requisition

2. UGAMart Cart assigned and routed first to OUA or FMD Point of Contact that is working with the DLFM to concur with requisition contents before it is routed to Procurement.

Step-by-Step Instructions

1. Login to ugamart.uga.edu

2. DLFM or appropriate person with the College/ Department of the DLFM, will create the requisition in UGAMart and attach proposal, along with drawings, and complete description of scope of work.

3. In UGAMart, in the "Internal Notes and Attachments" block, click edit to add a note for Procurement. Enter in the FPIF #XXX.

4. Click "Assign Cart" and search for an assignee – this will be the name of the OUA for FMD Point of Contact that is assigned to work with DLFM. As an example, Chuck Cartwright with OUA is assisting Griffin DLFM with a project. Type in the OUA point of contact name (Cartwright) and select, then add notes and click "Assign".

Assign Cart

User Search

Last Name	Cartwright
	Cartwright
First Name	
User Name	
Email	
HCM Department	
Role	
Results Per Page	10

Search

Assign Cart: User Search   ×

○ Select from profile values ⓘ   ● Search for an assignee

| Selected Assignee: | Charles Cartwright |
Assign Cart To:	Search for an assignee
Add to Profile	☐ Add to Profile
Note To Assignee:	

Assign   Close

5. The requisition will go to the OUA or FMD point of contact that was assigned the cart.

6. OUA or FMD point of contact will click "Proceed to Final Review" to review requisition and attachments and will add a comment on the comment tab
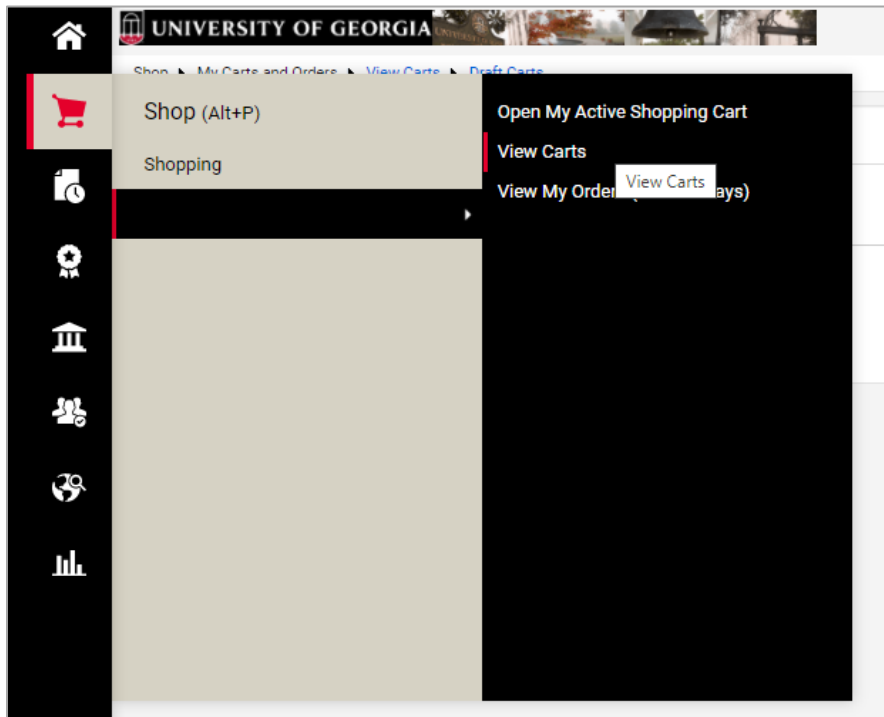

7. Add comment under the "Comments" tab and click "Add Comment" to close.
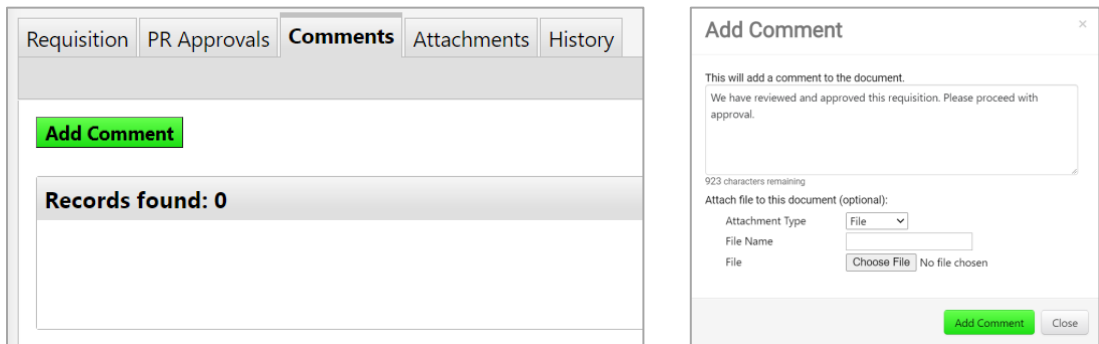
8. Then OUA contact will click "Assign Cart" and assign back to requisitioner.

9. Requisitioner will click on view shopping cart. Then will click submit for approval and follow normal procedure.

When a Change Order is Needed

1. If the scope and/or cost of the work changes, a change order is needed to update the existing contract and Purchase Order.

2. Request a proposal from the vendor with the scope of work & cost information.

3. Login to ugamart.uga.edu

4. Pull up the Purchase Order number in UGAmart.
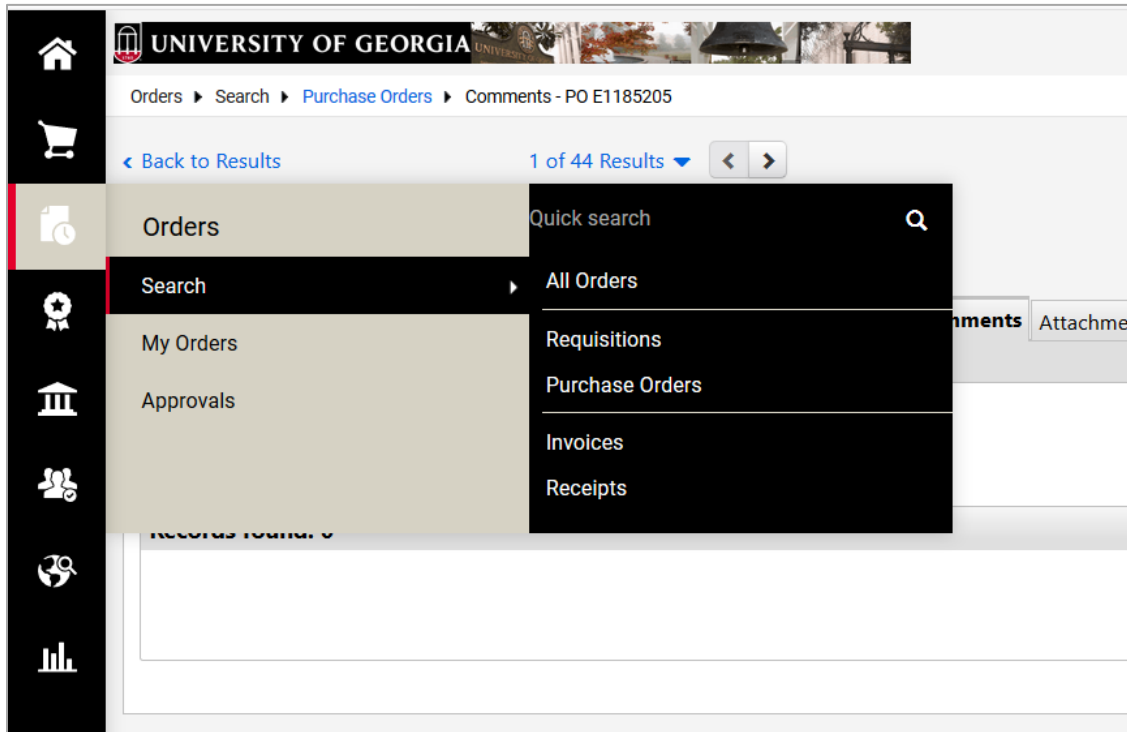
5. Click on the Comment tab and the Add Comment button.

6. Click on "add email recipient" and select the appropriate point of contact. Type a comment in the box. Attach the proposal to the comment by clicking the "Browse" button and type a description in the "File Name" field. Click the "Add Comment" button. Note: A Funding Chartstring will be needed if the change is an increase in cost. Adding this information in the comment would help to move the change through more quickly.

Add Comment

×

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

☐ Emily Salvia (Approved) <er73092@uga.edu>
☐ Kathleen Judson (Prepared for) <kj32782@uga.edu>
☐ Laura Elder (Prepared by) <elder@uga.edu>

add email recipient...

1000 characters remaining

Attach file to this document (optional):

Attachment Type	File ▼
File Name	
File	Browse... No file selected.

Add Comment   Close

7. The point of contact will receive an email from procure@uga.edu. The point of contact should click the "View Comment" link in the email.

View Comment

8. The point of contact will review the proposal and if it is ready to move forward, the point of contact will take the next steps needed to prepare the Change Order contract.