- Use Decision Document to determine if a change can or should be made.
- Go to the **Change Request Tab** located on the PO.

Purchase	e Order 🔸	Supp	lier	• PO Numb	oer <mark>Revi</mark> s	sion 0					
Status	Summary	Revisions	1	Confirmations	Shipments	Change Request	Receipts	Invoices	Comments	Attachments	History

1. Click on the Plus Sign to begin the Change Request

Note that the + sign will not be present for PO's that are closed. Email changeorders@purchasing.utah.edu to request the PO to be opened. If the PO is fully invoiced it is best to create a new PO. Contact Purchasing with questions.

• Type in a reason and details for the change:

Change Request Reason

*Price has changed from x to x (example)

- Make sure to include if:
 - The change order maintains the scope of work, services, contract end-date?
 - Is the cost per unit the same as the pricing on the original purchase order?

a. If desired add email recipient(s)	Email notification(s) Add recipient
 Attach any applicable/supporting documentation. Internal Attachment = Attachment for documentation U of U view of External Attachment = Attachment that will go with the PO to the support of th	Add External Attachment
Click <i>Create Change Request</i>	

if assistance is needed regarding these sections

General Information	<i>ب</i>	Ship To / Billing Options	ø	Notes/Attachments & Add'l Approvals $\mathscr{N} \cdots >$

- c. Has the Accounting Date changed ? If not update to todays date. (Billing Tab)
- d. If you are changing where this order is being delivered, have you communicated with the supplier regarding this change? <u>Shipping Tab</u>

3. Make the desired changes to the PO

1	_	_	_	
	PO			
	0	=		
	0	=		
	0	=		
	_			

a. Change / update the **Product Description**: Click on the current *Product Description* and make desired updates. Remember to be specific with regards to dates of service, contract details, etc.

1 Item						•••
A LOT OF FUN STUFF • 1 Item PO Total						• • •
∧ SUPPLIER DETAILS ↑						
Contract no value	PerNumber U0001	2345				
Product Description	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Product Description		1/EA	\$25.00	1 EA	\$25.00	



b. Changes to **PO amount**: Click on the *Product Description* line and update the dollar amount/quantity . Remember that funds cannot be decreased below dollars already paid to the supplier. (Look at invoice tab to review/confirm)



Add a new PO line: Click on the options dots found to the right of the suppliers name at the Product Description.

Click on Non-Catalog Quick Order.

Information added here will create a new PO Line

Non-Catalog Quick Order

d. Changes to PO Funding (Chartfield): (Reference Decision Document for detailed guidance)



NOTE: The funds that have already been paid/vouchered are fully liquidated and must remain for this change to be successful. See <u>Requisitioner Training</u> Invoice section for more detailed guidance

 Accounting Distribution at the <u>Header</u> — applies to all PO Lines

 Click on the **pencil** to edit Funding added here applies to the entire PO and splits by percentage in **Peoplesoft**

Accounting Distribution at the <u>PO Line</u>

• Click on **dots** to edit

Funding added here applies to that line only. However the payment is made exactly as entered here

Accounting Distr	ribution							···
Acct Dist Shortcut	BU	Org	Fund	Activity	Project	Account	A/U	_
Activity or Project		Sho	rtcut auto fills the	se fields		Ex: 62500 for Office supplies	Activity = 1 or 0 Project = Blank	
č								

¥ Note for successful processing of payments and Change Requests is it best practice to add the Chartfields at the PO line when using multiple funding sources.

1 Item						🗌 💌
A LOT OF FUN STUFF · 1 Item	PO Total]
∧ SUPPLIER DETAILS [↑]						
Contract no value	PO Number	U00012345				
Product Description	Catalog	g No. Size/Packaging	Unit Price	Quantity	Ext. Price	
Product Description		1/EA	\$25.00	1 EA	\$25.00	



- **4. Review:** Verify that changes are accurate, appropriate documentation has been attached, sufficient supporting comments have been added for documentation/post audit, etc.
- 5. Submit Request

Submit Request



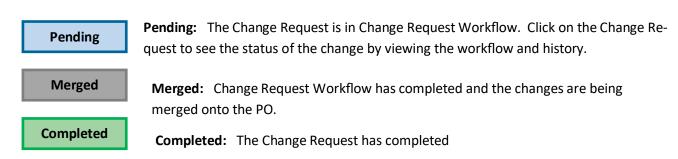
- Change Request Workflow : The "Change Request" Triggers a new Workflow called "Change Request Approval". Note that Change Request has workflow similar to Requisition workflow. The status of this change is visible at all times.
 - The "Change Request" is a new Document type

Pending	
Total (7,927.00 USD)	~
Subtotal	7,927.0
	7,927.0
Related Documents	~
Purchase Order: UP00003304	
Requisition: 3551647	
What's next?	~
Workflow	C 🖶
Show skipped steps	
Submitted 10/22/2022 11:51 AM HEATHER M HOLLEY	
Start - Parallel Steps	
- CF Validation Active	
CF Validation Response	
End - Parallel Steps	
Procurement Review Puture	
Start - Parallel Steps	
Department Approval Pature	



Change Request Tab: This tab shows the status of the Change Request and is located on the PO

urchase Order •	A LOT OF FUN STUFF	PO Number Revision 0				
Status Summary	Revisions 1 Confirmati	ons Shipments Change Requ	est Receipts Invoices	Comments 1	Attachments	History
Records found: 1						
Status	Number	Owner		Created		
Pending	3637955	HEATHER M HOLLEY		10/28/2022		



One Sheet

- Use Decision Document to determine if a change can or should be made.
- Go to the Change Request Tab located on the PO •

Purchase Order • Supplier • PO Number Revision 0
Status Summary Revisions 1 Confirmations Shipments Change Request Receipts Invoices Comments Attachments History
Click on the Plus Sign to begin the Change Request +
Type in a detailed reason for the change Change Request Reason
Attach any applicable/supporting documentation.
a. External Communications tab: External Communications Resend to
 If the supplier should receive a copy of the updated PO click on this box If the supplier should not receive a copy of the PO leave this box blank
2. Click <i>Create Change Request</i> Create Change Request
3. Make the desired changes to the PO
a. Change / update the Product Description :
b. Changes to PO amount :
c. Add a new PO line :
d. Changes to PO Funding (Chartfield) :

NOTE: The funds that have already been paid/vouchered are fully liquidated and must remain for this change to be successful. See <u>Requisitioner Training</u> Invoice section for more detailed guidance Note for successful processing of payments and Change Requests is it best practice to



1.

4. Review: Verify that changes are accurate, appropriate documentation has been attached, sufficient supporting comments have been added for documentation/post audit, etc.

add the Chartfields at the PO line when using multiple funding sources.