The PO Renewal form is to be used for annual or regularly scheduled services, such as a copier maintenance agreement. This can also include the regularly scheduled delivery of goods such as bottled water. When such orders are placed on this form, it is easy for departments to generate a list of their renewal POs to re-submit as a new fiscal year approaches.

Detailed instructions on how to generate this list are available in the training materials lesson titled "Re-Submit Renewal Orders".

This form is not to be used for punch-out catalog suppliers, nor for the repetitive ordering of tangible goods. Orders for goods should be placed on an as-needed basis.

**Is the right form for your purchase? Take a minute to consider these questions:**

1. Is my order for annual or regularly scheduled services?
2. Is there a high frequency of delivery, i.e.: weekly?
3. Do I have a contract or service agreement in place?
4. Have I checked the contract dates to ensure that it is still valid?
5. Have I contacted the Purchasing Department to discuss the possible use of the PO Renewal?

If the answer to any of these questions is "yes", proceed with the PO Renewal form.

The Purchasing Department will contact you if further discussion is required.

**Location**

The PO Renewal form is found in the Place an Order section of the Shopping Dashboard. Click to open.
Supplier Information

1. Search for your supplier using the Enter Supplier field. If your supplier is not yet available in UShop, type "New Supplier" in this field.

2. You may search for the supplier in CIS by clicking on the Vendor Search link above and following the prompts, or

3. You may provide the New Supplier Details in the fields below.

Additional Details

What you type here will be printed on the PO. In this section you may provide information for the Supplier that you do not include in the Product Description. An example is a delivery contact name and number.
PO Renewal Details

1. Product Description. The information typed in this field will be seen on the Purchase Order as one PO line item. Please include:
   - A clear description of what you want to buy.
   - The beginning and end dates of the order.
   - Service or Billing frequency.
   - Any other details such as equipment serial numbers, reference to an attached agreement, etc.

2. Quantity and Estimated Line Unit Price.
   - Type “1” if you are considering this order as one job for the whole year. In this case you will indicate the total Estimated Line Unit Price for the whole order.
   - Or, you may choose to indicate quantity based on the number of deliveries/service calls, such as “12” for monthly. In this case, you will indicate the Estimated Line Unit Price as the cost for one delivery/service call.

3. Indicate the Service Start and End dates.
Product Health & Safety Disclosures

This section is required.

1. If you have no disclosures to declare, click No.

2. If you have disclosures to declare, click Yes, and check the boxes below to give details.
Purchasing Department Details

1. Provide pertinent information about this order, such as, is there currently a Contract in place?

2. Does this order require a competitive Bid or Sole Source approval?

3. Be sure to attach any applicable documents. However, do not attach documents that are confidential or sensitive. **Contact Purchasing to determine how they want to receive these confidential or sensitive documents.**

### Attachment Details

1. To attach documents intended only for the Purchasing Department or other UShop users, click on the **Add Attachments** button under Internal Attachments.

2. Keep in mind that External Attachments can be seen by all UShop Users and will also be sent to the supplier.
Add and go to cart

When you have completed the form, scroll up to Available Actions and select Add and go to cart. Click Go.

If you are submitting renewal orders in advance for the fiscal new year, you will need to edit the Accounting Date.

To do this, when your cart is ready to go, click on Proceed to Checkout.

Accounting Date

1. Click on the Billing Options tab
2. Click on the edit link.

Edit Accounting Date

The first billing option is Accounting Date. For new fiscal year orders, select “July 1” of the current year and click Save. You may enter any date in an open accounting period. General Accounting has now opened accounting periods for four months going forward.