



This form is used to make changes to an existing Purchase Order (PO). Please note that it is not always the best practice to modify a PO; sometimes it is best to create a new PO.

- 1. Please carefully read the instructions provided on the form to help determine whether the *Change* Order Request is appropriate for your situation.
- · Use this form to request a change to a current PO.
- Punch-Out Orders
 - o Increases or decreases to quantity or price are NOT allowed on Punch-Out Catalog
 - · To increase the quantity, simply place an additional Punch-Out order.
 - o To decrease the quantity, contact the supplier directly. Orders may be dispatched directly to the warehouse, making changes difficult if not impossible. In such a case, contact (simply work with) the supplier to arrange a return.
- · Accounting Distributions (Chartfields)
 - o Accounting distribution changes may be made only on remaining funds
 - Accounting distributions on a product description line must be accurate so the payments can be properly applied.
 - · If multiple accounting distributions and product description lines are needed, create multiple product description lines with the correct assigned accounting distribution(s) per line.
- · Change Order Threshold
 - · A change order is always required if the PO previously fell at or below the \$5,000 Small Dollar Threshold and the increase causes it to exceed the \$5,000 Small Dollar
 - · Barring a situation like the previous bullet point, change orders are NOT required for orders that do not exceed the \$5,000 Small Dollar Threshold if the increase is less than or equal to \$500 per order line.
 - o For orders that already exceed the \$5,000 Small Dollar Threshold, a change order is NOT required if the desired increase does not exceed 10% of the order line or \$1,000.
- **2.** The two questions at the top of the form are designed to help determine whether the requested change is within the original scope of the existing PO. A response is required for each question.

Change Order: Request Changes to an Existing PO Does this change order maintain the scope of work, No - Submit a requisition for a new PO services, contract end-date, and supplier name? Yes - complete this form Is the cost per unit the same as the pricing on the No - Submit a requisition for a new PO original purchase order?

3. Provide your department contact information.

B Requesting Department Information Department Name Contact Name Phone Number Email Address

4. Provide the name of the Supplier on the original PO, and indicate whether the supplier needs a copy of the revised PO.

Supplier Information

Yes - complete this form

Type in the name of the supplier in the "Enter Supplier" field box.

| Enter Supplier | |
|---|-----------------------|
| | or Supplier Search |
| Does the supplier need to receive an updated version of the PO? | No Yes |

- **5.** In the *Requested Changes* section, provide important information:
 - a. The PO number and details about the original and requested total dollar amount.
 - b. The reason for the Change Order. Here you explain why you are requesting a change, i.e. Was the invoice higher than anticipated? Did the job take longer than planned? Did you need more widgets than originally calculated?, etc.

| | Requested Changes |
|---------------------------|-------------------|
| PO Number | |
| Current PO Amount | |
| Increase Amount | |
| Decrease Amount | |
| New PO Total Amount | |
| Reason for Change Order | |
| | |
| | |
| 2000 characters remaining | expand clea |

6. In the next section, you are to provide the details of the requested change(s). Please fill in only the lines affected by requested change(s).



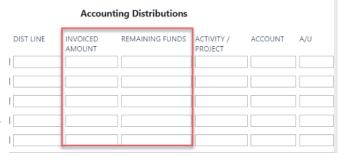
7. Under *Type*, select from the dropdown menu the type of change requested for that particular line. Are you adding a new line, updating an existing line, etc. Note that the *Change – Accounting* option pertains to Accounting Distributions. A different type of change may be selected for each line, as needed



8. Always indicate what *Line #* or *Distribution Line* you are referencing. Then, fill in only the applicable fields for each requested change. For example, if the only change on Line 3 is in the Product Description verbiage, only fill in that section; or if the only change on Dist Line 1 is the Accounting Distribution, only fill in those fields.



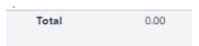
9. Note that to request a change to Accounting Distributions, the *Invoiced amount* and *Remaining funds* must be provided. This is because accounting distribution changes may be made only on remaining funds. (See Supplement A, below, to learn how to determine whether a line has remaining funds.) It is important to understand that when a change is made on remaining funds, the change is NOT made on funds previously vouchered/invoiced.



10. In the *Attachments* section, be sure to attach any documents that pertain to the Change Order Request.

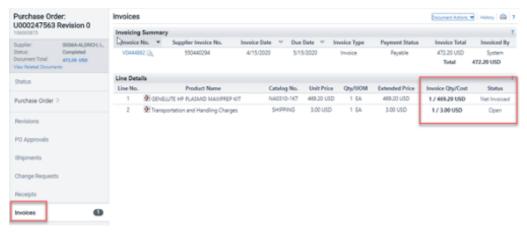


11. The dollar total on a *Change Order Request* will always remain \$0.00. This document does not automatically generate a change on the PO. It sends the request to the Purchasing Department to change the PO. You will receive an email notification when the change is made.



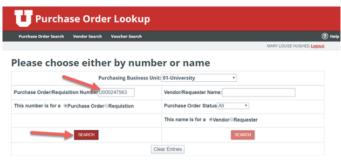
Supplements

- A. Find invoiced and remaining funds on a distribution line
 - i. If there is only one Accounting Distribution line on your PO, open the *Invoices* tab on the PO. The example below indicates that \$469.20 is invoiced and \$3.00 is remaining. In this case, a Change Order request could be submitted only on the remaining \$3.00.



ii.a. If there are multiple Accounting Distribution lines on your PO, it is more helpful to look in PeopleSoft *Purchase Order Lookup*.

Type the PO number, then click SEARCH.



ii.b. Click on PO Voucher History.



ii.c. The PO Voucher History displays the liquidated and remaining amounts for each chartfield. In the example below, nothing has been invoiced against this PO, so all funds are remaining on each of the chartfields.

A *Change Order Request* could be submitted for any distribution line of the PO.

