



Change Request Decision Document

- **NOTE:** If this is a new order and is not related to an existing PO **Then** create a new PO.
- **NOTE:**  Any Change Request submitted against a Punch-out order may be rejected.
- **NOTE:** PO's in soft close , fully invoiced or Closed cannot have a Change Request processed against it. Email Changeorders@Purchasing.utah.edu to discuss options.

To determine whether a change request is appropriate:

1. Look at PO # and existing chartfield accounting distributions to compare with PO Voucher History.
2. Look up PO # in "[Purchase Order Lookup](#)" (This can also be found in CIS)
 - Click on "PO Voucher History" 
3. Review the dollars **Encumbered**, **Liquidated**, **Remaining** and the total **Vouchered** Amount per Chartfield Distribution and per product description line.

PO Amounts			Vouchered Amount
Encumbered	Liquidated	Remaining	

- ◇ Remaining = Dollars which can be altered
- ◆ Liquidated = Dollars already paid to the supplier and are unalterable
 - △ Liquidated /Vouchered Dollars on **Activities** will require an e-journal to move the dollars
 - △ Liquidated /Vouchered Dollars on **Projects** will require a Cost Transfer to move the dollars



Note that on the PO, *Invoices* tab in UShop, you can view the total dollars that are:

1. **Open** = Available to change and to invoice against
2. **Net Invoiced** = Unchangeable and already paid to the supplier

Purchase Order • A LOT OF FUN STUFF • UP00003352 Revision 0										
Status	Summary	Revisions 1	Confirmations	Shipments	Change Requests	Receipts	Invoices 1	Comments	Attachments	History
Records found: 1, Totaling: 4,200.00 USD								+		
Invoice No. ↓	Supplier Invoice No.	Invoice Date	Due Date	Invoice Type	Payment Status	Invoice Total	Invoked By			
VP001540	2446faf	10/31/2022	10/31/2022	Invoice	Payable	4,200.00 USD	HOLLEY, HEATHER M			
Line Details										
Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Invoice Qty/Cost	Status			
1	Product 1		100.00 USD	11 EA	1,100.00 USD	n/a / 800.00 USD n/a / 300.00 USD	Open Net Invoiced			
2	Product 2		200.00 USD	22 EA	4,400.00 USD	n/a / 3,200.00 USD n/a / 1,200.00 USD	Open Net Invoiced			
3	Product 3		300.00 USD	33 EA	9,900.00 USD	n/a / 7,200.00 USD n/a / 2,700.00 USD	Open Net Invoiced			

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Should changes be made to a **Chartfield** Distribution?

- **No** — A Change Request cannot occur when:
 - If all dollars have been **liquidated/vouchered**—an **e-journal** (activities) or **Cost Transfer** (Projects) will be required, to be processed by the department, to move the money as invoices have already been paid against the existing Chartfield Distribution(s) .
 - **No— If the order was through a Punch-out.**
- **Maybe** — A Change Request maybe able to occur when:



- **Only remaining/unvouchered funds** can be moved. Check the PO voucher history .

***Make sure to leave Chartfields that are liquidated to match PO voucher to prevent failure to the change.

- ◆ **If there are not funds in remaining** column, of voucher history, then the chartfield string may NOT be updated.

- **Yes** — A Change Request can occur:

A. **If there aren't any invoices/vouchers present all chartfields may be updated.**














Should changes be made to **Dollars**?

- **Yes** —
 - If the request is to **increase** funds, **and** the change relates to the original order, (for example adding shipping) then proceed with the increase Change Request. (Note A/P tolerances cover up to 10%)
 - If the request is to **decrease** funds **and** there aren't any **vouchers (any funds liquidated)** against the PO then proceed with the decrease Change Request.
- **No** —
 - If the request is to **decrease** funds **and** there are already vouchers (**funds liquidated**) against the PO **and** the **decrease** takes the new PO total to less than the vouchered amount then do not proceed.
 - If the order was through a **Punch-out**. Then do not proceed. Punch-out orders come from the supplier as a frozen block of data that is not alterable. The system will not allow changes.
 - If the request is to **increase** funds that exceeds the amount awarded through a Procurement process (bid/RFP/contract) contact the buyer in Purchasing to discuss your request.

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Change Order

When it appears that a change should be made to the PO there are several conditions that would effect whether or not that change can be made. This Chart will assist you in determining the appropriate course of action.

Shopping Source	PO is Closed	PO Line Alterations 	Accounting Distribution Vouchered (Invoiced) 	Accounting Distribution Un-Vouchered (Not yet Invoiced) 	PO is Fully Invoiced
Punch-out	 No Changes can be processed	 No Changes can be processed	 No Changes can be processed	If the full line has not been Invoiced = Change Order is ok  Due to CXML Invoicing	 No Changes can be processed
What Can I do:	Contact UShop@Utah.edu	1- Create a new PO for additional items 2- Contact the supplier to decrease the quantity	If the line has been Invoiced 1- Activity = e-journal 2- Projects = Cost Transfer	If the line has been Invoiced 1- Activity = e-journal 2- Projects = Cost Transfer	1- Create a new PO 2- Contact UShop@Utah.edu
Forms	 No Changes can be processed	A Change Order can be created if it pertains to the original order	 No Changes can be processed	A Change Order can be created for the Un-Vouchered portion	 No Changes can be processed
What Can I do:	Contact UShop@Utah.edu	1- If the change is related to the original order = Complete the Change Order Form (For Example: to Add a line for Shipping) 2- If not create a new PO	If the line has been Invoiced 1- Activity = e-journal 2- Projects = Cost Transfer	Complete the Change Order Form to request an update to the Accounting Distribution	1- Create a new PO 2- Contact UShop@Utah.edu



If the change applies to the original order or for any other reason contact UShop@Utah.edu to work towards a solution.



Matrix from [Requisitioner Training](#)

Additional helps found in [One UShop](#)