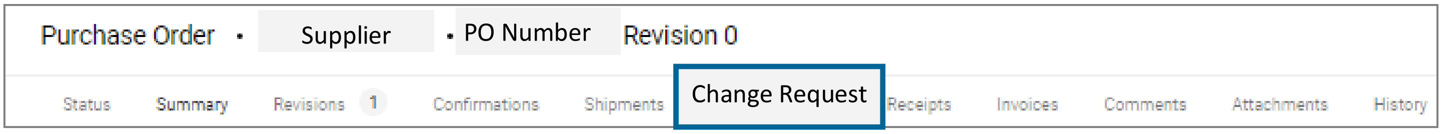
How to create a Change Request

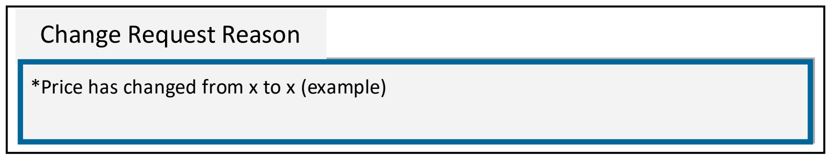
- Use Decision Document to determine if a change can or should be made.
- Go to the **Change Request Tab** located on the PO.



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:**

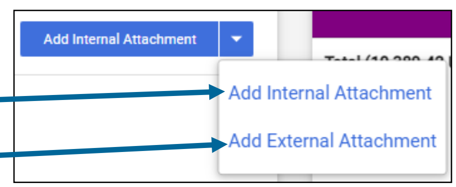


  - Make sure to include if:
    - The change order maintains the scope of work, services, contract end-date?
    - Is the cost per unit the same as the pricing on the original purchase order?

a. If desired add email recipient(s)

Attach any applicable/supporting documentation.

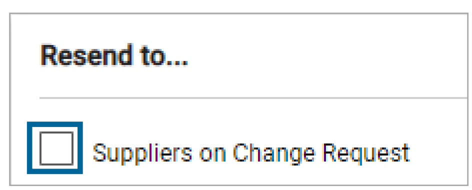
- **Internal** Attachment = Attachment for documentation U of U view only
- **External** Attachment = Attachment that will go with the **PO to the supplier**



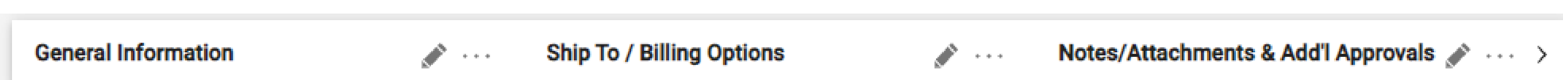
2. Click ***Create Change Request***

a. *External Communications* tab:

- 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**



b. All tabs on the Purchase Order are now editable as "Create Change Request" was selected. See [Proceed to Checkout helps] if assistance is needed regarding these sections



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? [Shipping Tab]

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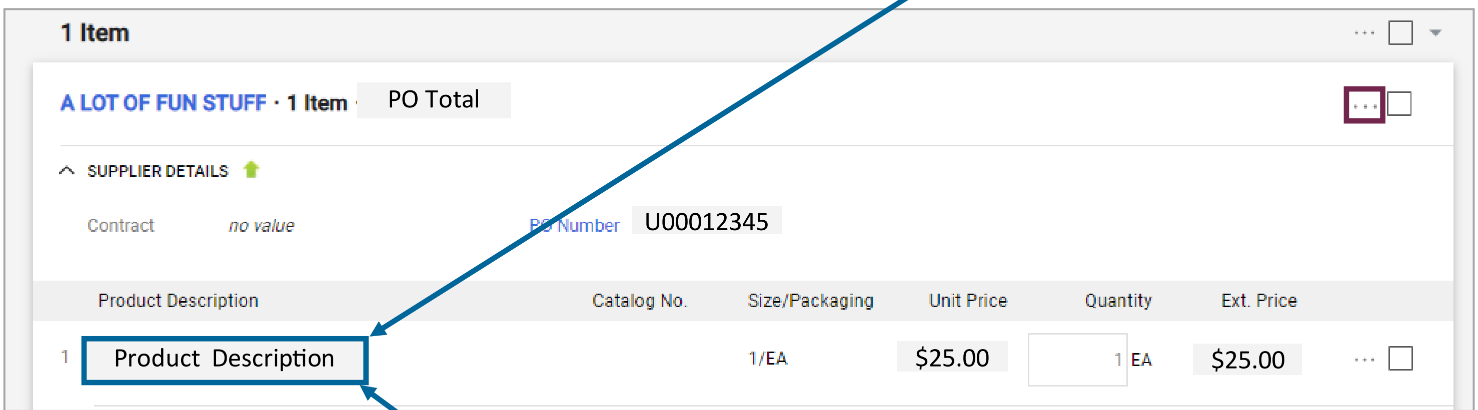
3. Make the desired changes to the PO

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.

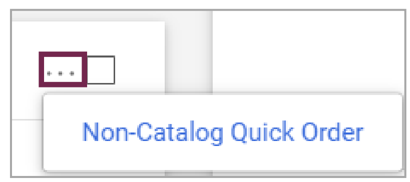


b. Changes to **PO amount**: Click on the *Product Description* line and update the dollar amount/quantity . Remember that funds cannot be decreased below dollars already paid to the supplier. (Look at invoice tab to review/confirm)

c. 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*



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 Requisitioner Training Invoice section for more detailed guidance

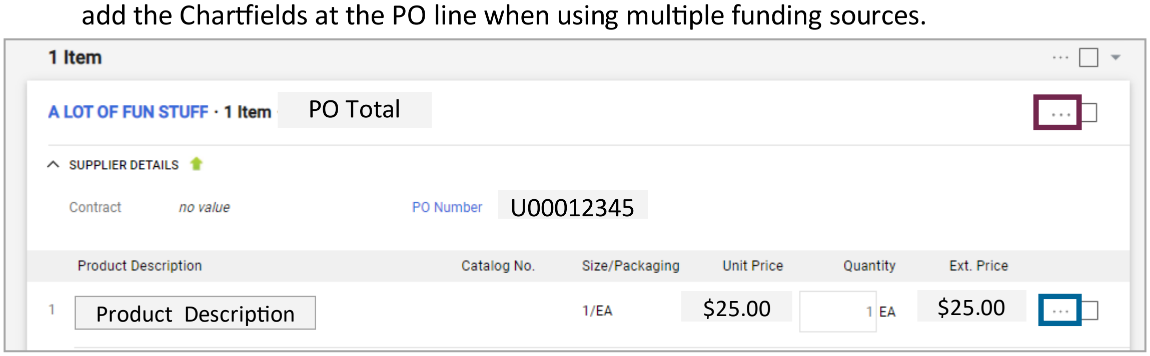
- **Accounting Distribution at the Header** —applies to all PO Lines
  - Click on the **pencil** to edit

Funding added here applies to the entire PO and splits by percentage in **Peoplesoft**

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.

- **Accounting Distribution at the PO Line**
  - Click on **dots** to edit

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



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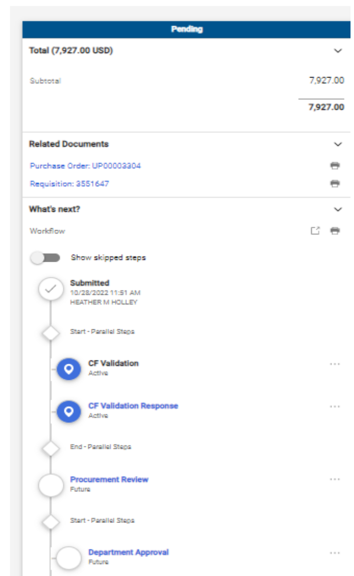
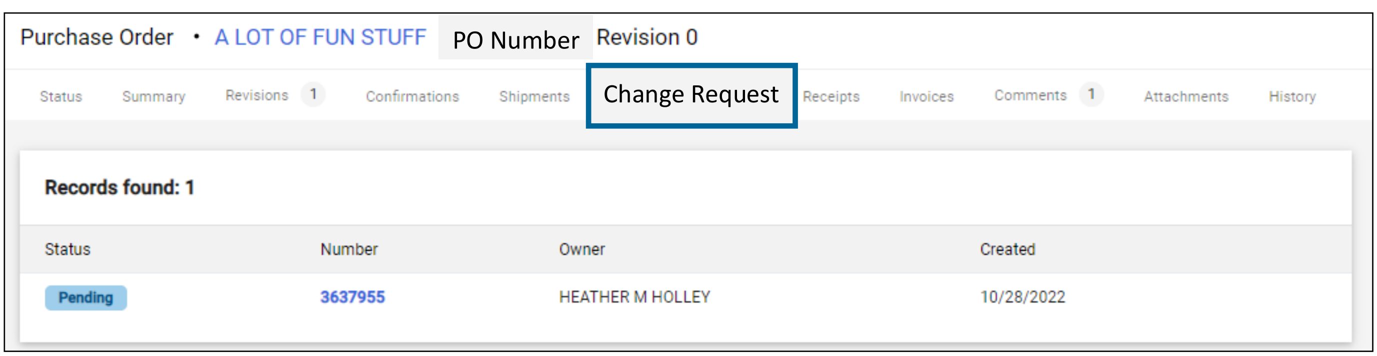
4. **Review:** Verify that changes are accurate, appropriate documentation has been attached, sufficient supporting comments have been added for documentation/post audit, etc.

5. **Submit Request**

- **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



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



Pending — **Pending:** The Change Request is in Change Request Workflow. Click on the Change Request to see the status of the change by viewing the workflow and history.

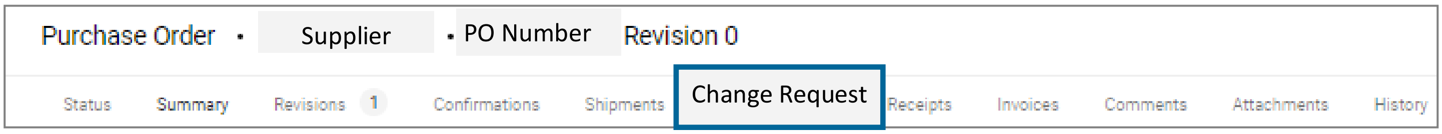
Merged — **Merged:** Change Request Workflow has completed and the changes are being merged onto the PO.

Completed — **Completed:** The Change Request has completed

How to create a Change Request

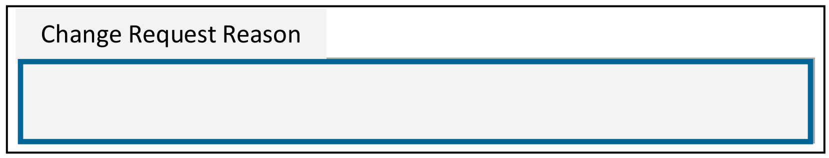
One Sheet

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



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

- Type in a detailed **reason for the change**



Attach any applicable/supporting documentation.

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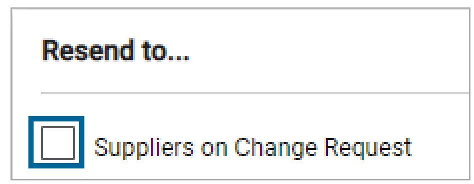
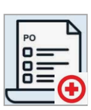


2. Click ***Create Change Request*** 

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 Requisitioner Training Invoice section for more detailed guidance

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Rev 2/7/23 HH