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
   ![Plus Sign]

   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)

     ![Internal Attachment]
     ![External Attachment]

     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
   ![Create Change Request]

   a. External Communications tab:

   ![Resend to...]
   ![Suppliers on Change Request]

   - 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

   ![General Information]
   ![Ship To / Billing Options]
   ![Notes/Attachments & Add'l Approvals]

   c. Has the Accounting Date changed? If not update to today's 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.

   ![Product Description](image)

   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)

   ![PO amount](image)

   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*

   ![Non-Catalog Quick Order](image)

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

      ![Chartfield](image)

      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

      - **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

      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.
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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

<table>
<thead>
<tr>
<th>Status</th>
<th>Number</th>
<th>Owner</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>3637955</td>
<td>HEATHER M HOLLEY</td>
<td>10/28/2022</td>
</tr>
</tbody>
</table>

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

- **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

```
Purchase Order  Supplier  PO Number  Revision 0
Status  Summary  Revisions 1  Confirmations  Shipments  Receipts  Invoices  Comments  Attachments  History

Change Request
```

1. 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]

   • 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 **Create Change Request**

3. **Make the desired changes to the PO**

   a. Change / update the **Product Description**:

   ![Product Description]

   b. Changes to **PO amount**:

   ![PO amount]

   c. Add a **new PO line**:

   ![New PO line]

   d. Changes to **PO Funding (Chartfield)**:

   ![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.

   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.

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

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