

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**
  - Increases or decreases to quantity or price are **NOT** allowed on Punch-Out Catalog orders.
  - To increase the quantity, simply place an additional Punch-Out order.
  - 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)**
  - 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 Threshold.
  - 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.
  - 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, services, contract end-date, and supplier name?  No - Submit a requisition for a new PO  Yes - complete this form

Is the cost per unit the same as the pricing on the original purchase order?  No - Submit a requisition for a new PO  Yes - complete this form

3. Provide your department contact information.

**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**

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:

- The PO number and details about the original and requested total dollar amount.
- 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 | clear

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).

To add or update Product Description Lines, Price, Quantity or Accounting Distributions, please fill out applicable fields below.

Product Changes						Accounting Distributions					
TYPE	LINE #	PRODUCT DESCRIPTION LINE	UNIT PRICE	QTY	TOTAL	DIST LINE	INVOICED AMOUNT	REMAINING FUNDS	ACTIVITY / PROJECT	ACCOUNT	A/U
▼											
▼											
▼											
▼											
▼											

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

TYPE ▼

- Add
- Update
- Increase
- Decrease
- Change - Accounting

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.

Product Changes						Accounting Distributions					
TYPE	LINE #	PRODUCT DESCRIPTION LINE	UNIT PRICE	QTY	TOTAL	DIST LINE	INVOICED AMOUNT	REMAINING FUNDS	ACTIVITY / PROJECT	ACCOUNT	A/U
Update	3	Add more details to the Product Description.									
Change - Accounting						1	0	100	2148	4200	0

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.

Accounting Distributions					
DIST LINE	INVOICED AMOUNT	REMAINING FUNDS	ACTIVITY / PROJECT	ACCOUNT	A/U

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

### Attachments

Attach supplier quote, invoice or other document(s) applicable to this request.

Internal Attachments

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.

Total	0.00
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## 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.

Invoice No.	Supplier Invoice No.	Invoice Date	Due Date	Invoice Type	Payment Status	Invoice Total	Invoiced By
V044862	550440294	4/15/2020	5/15/2020	Invoice	Payable	472.20 USD	System
						<b>Total</b>	<b>472.20 USD</b>

  

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Invoice Qty/Cost	Status
1	GENEUITE HP PLASMD MAXPREP KIT	NA0210-1KT	469.20 USD	1 EA	469.20 USD	1 / 469.20 USD	Net Invoiced
2	Transportation and Handling Charges	SHIPPING	3.00 USD	1 EA	3.00 USD	1 / 3.00 USD	Open

- 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*.

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.

**PO Voucher History**

PO		PO Amounts			Vouchered Amount	Chartfields					Due Date		
LN	SCH	DST	Encumbered	Liquidated	Remaining	BU	OrgId	Fund	Activity	Project	Account	A/U	Due Date
1	1	1	13,010.00	0.00	13,010.00	0.00	01	00327	4910	06541	64500		16-Apr-2020
*Total Line 1			13,010.00	0.00	13,010.00	0.00							
2	1	1	4,300.00	0.00	4,300.00	0.00	01	00327	4910	06541	64500		16-Apr-2020
*Total Line 2			4,300.00	0.00	4,300.00	0.00							
3	1	1	9,350.00	0.00	9,350.00	0.00	01	00327	4910	06541	64500		16-Apr-2020
*Total Line 3			9,350.00	0.00	9,350.00	0.00							
4	1	1	9,350.00	0.00	9,350.00	0.00	01	00327	4910	06541	64500		16-Apr-2020
*Total Line 4			9,350.00	0.00	9,350.00	0.00							
5	1	1	6,300.00	0.00	6,300.00	0.00	01	00327	4910	06541	64500		16-Apr-2020
*Total Line 5			6,300.00	0.00	6,300.00	0.00							
**PO Total			42,310.00	0.00	42,310.00	0.00							