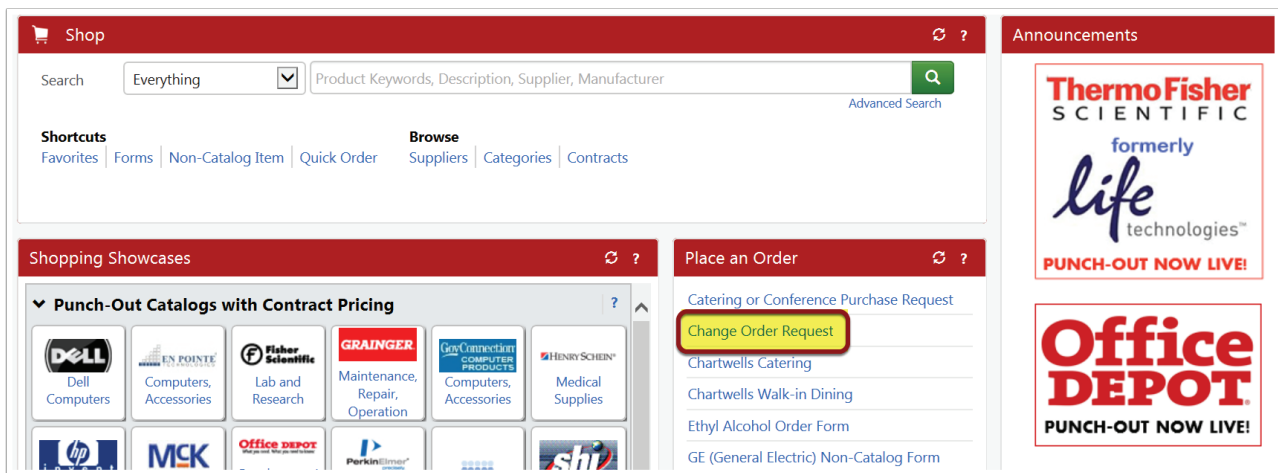The Change Order Request form is used to request modifications to an existing PO that you intend to keep open. This form sends your request to the Purchasing Department where the change is made.

Before submitting a Change Order Request, it is important to understand that a Change Order may not be used to increase/decrease PO line quantity or price for orders placed via hosted or Punch-out catalogs.

- Punch out catalog pricing is set and cannot be modified.

- If a decrease in quantity is needed, contact the supplier.

- If an increase in quantity is needed, simply place another punch-out order.

The Change Order Request form is located on the Shopping Dashboard in the Place an Order section.

Open the link to "Change Order Instructions" for detailed guidance on when this form should and should not be used.

Complete the fields for:

1. Requesting Department Information, and

2. PO & Supplier Information

Internal Attachments

Add Attachments

Requesting Department Information:

Department Name

Contact Name   **1**

Phone Number

Email Address

PO & Supplier Information:

Please search for the supplier used on the original PO in the box below. If you're using this form to request changes to a legacy PeopleSoft PO and your supplier is not yet in UShop, type "New Supplier" in the **Enter Supplier** box.

Enter Supplier

or

Supplier Search

2

Enter the original PO number for which you are requesting changes in the box below. You may use this form to request changes to a Non-UShop PO.

PO Number

Provide details of your Requested Changes by completing all applicable fields in:

1. Cost Related Changes,

2. Quantity Related Changes, and/or

3. Chartfield/Accounting Related Changes.

Cost Related Changes: Increase or Decrease the Amount on PO line(s)

Increase Cost

Decrease Cost

Amount   **1**

Applies to PO line #

Does this change apply to the Total or Per Each Cost?

Quantity Related Changes: Increase or Decrease the Quantity of items *Note: This cannot be done for punch-out suppliers. See #2 in the instructions for more info.*

Increase Quantity

Decrease Quantity

Amount   **2**

Applies to PO line #

Does this change apply to the Total or Per Each Quantity?

Chartfield / Accounting Related Changes: Update the chartfield(s) on PO line(s)

Update Accounting Distribution (Chartfield)

Old Chartfield   **3**

New Chartfield

Applies to PO line #

In this field you are required to summarize your requested changes.

Please provide an explanation or summary of the requested changes in the box below. A response is required.

2000 characters remaining   expand | clear

Click the appropriate button to indicate whether or not the Purchasing department should send a copy of the revised PO to the Supplier.

Does the supplier need to receive an updated version of the PO after the requested updates are done?

○ No
○ Yes

This last field is optional, but it will speed up the process if you are able to select the Purchasing buyer who handles the commodity on your Purchase Order.

If you know the name of the Purchasing Buyer you need to work with, please select it from the drop down below.

Purchasing Buyer

When the form is complete, scroll to the top of the page. Select Add and Go to Cart in the Available Options. Click Go.

Available Actions: Add and go to Cart   Go   Close

You can see that a Change Order Request becomes a new cart/requisition.

1. Name the cart the PO number followed by Change Order. Click Update.

2. Note that the dollar amount on a Change Order Request will always be "$0.00". This is because the form itself does not encumber funds. The actual change will appear on the PO when it is revised by the Purchasing Department.

3. Click on Proceed to Checkout.

Add the Accounting Distribution, using the chartfield you want to appear on the modified PO.

That way, your Department Approver will see the current Chartfield for this order.

When Department Approval is given, the requisition continues to the next workflow step. It will stop in the Purchasing Department where the requested changes will be made.

The Purchasing Department will document the change order in a Comment on the PO.

Comments	3
Attachment Overview	2

Email sent: ██████████████████

██████████ [Reply To] [New Comment]
Applies To: Requisition - 92231168
Comment Added - 8/23/2017 8:41 AM

Also change the ORG ID from 00410 to 00149. Thank you.

Email sent: ████████████████████ MIKAELA MARIE DAVIS <mdavis@purchasing.utah.edu>

MIKAELA MARIE DAVIS [Reply To] [New Comment]
Applies To: Requisition - 92231168
Comment Added - 8/23/2017 8:39 AM

Modified PO U82071 to change activity from 07873 to 07874; per UShop Requisition 92231168.

Email sent: ███████████████████