### Indiana University Office of Procurement Services

#### STANDARD OPERATING PROCEDURE

<table>
<thead>
<tr>
<th>SOP NO:</th>
<th>SOP-PURCH-08</th>
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<td>SUBJECT:</td>
<td>Change Request Process (PO Amendment)</td>
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<tr>
<td>SOURCE:</td>
<td>University Procurement Services</td>
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<tr>
<td>ORIGINAL DATE OF ISSUE:</td>
<td>5/16/2019</td>
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<tr>
<td>DATE OF LAST REVISION:</td>
<td>6/3/2019</td>
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<td>DISCLAIMER:</td>
<td>The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Purchasing reserves the right to determine on a case by case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances.</td>
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<td>RATIONALE:</td>
<td>There are instances when a PO requires an amendment for various reasons (e.g. account edit; extension of recurring PO; additional funds on recurring PO; change CAMS status; etc). All Change Request documents will route for Fiscal Approval and Purchasing approval.</td>
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### PROCEDURES:

**As Departmental User – Initiate Change Request, make required changes:**

1) Initiate a Change Request document from a Completed PO by selecting ‘Create Change Request’ from Document Actions:

   ![Screenshot of Change Request Process](image)

   This will return a Comments box to add a note, as well as select users you want to notify of the change. **Please do not include Purchasing, as all Change Requests will route to Purchasing for review/approval.**

   **NOTE:** Fiscal Approvers do not have the ability to approve change requests they have initiated. Initiator and approver must be two different people.

2) Add a detailed note of what is being changed in the Comments box that is presented. **IMPORTANT:** IF REVISED PO NEEDS SENT TO SUPPLIER, MAKE SURE TO INDICATE THAT IN THE COMMENT. **PURCHASING WILL UPDATE THAT SETTING WHEN THE DOCUMENT REACHES THEM.**

3) Make required changes by opening the tab/section where edits are needed, then clicking the ‘Edit’ link or ‘Edit’ button within the tab (as shown in below screenshot).
3A) If Editing the Line Item detail,
   - Clicking Edit button allows you to edit the commodity code, CAMS, Notes, fields.
   - Clicking the description (or the ‘more info’ link) allows you to edit the full line item detail – description, quantity (QTY), price, UOM, etc. IF those fields are editable (what is editable will depend on the supplier and type of order).

3B) If changing the QTY,
   - The QTY field on the Change Request document will display the ‘remaining QTY to be invoiced’ when you initiate the change request.
   - IF you are changing the QTY make sure you enter the actual QTY that should be displayed on the PO after the PO is back in Complete status (regardless of what you see in the Change Request.
     o (The change request document shows remaining QTY to be invoiced...not the actual PO total that has been ordered. GL entries will also be based on PO document QTY after PO becomes Complete status again).
   - For example, if you ordered 5, paid for 3, remaining QTY shows 2 and you really only want a total of 4, not 5....you want to make the QTY 4 (not 1). After you submit the Change Request for approval, the PO QTY Total will reflect whatever QTY you enter in the Change Request, so making it 1 would show a total QTY of 1.

3C) If Adding a new line item,
   - Click ‘Add non-catalog item for this supplier’ link under the supplier name.
     Fill in the details; Make sure to include the Commodity Code.

4) When all changes are complete, click the “submit request” blue button to route the document.
   The document will route to the FO of the accounts, to Purchasing for review/approval, and any other workflow stop that is trigged by the changes.
   You can review the workflow by clicking the ‘Change Request Approvals’ link on the document.

As FISCAL APPROVER – review/approve/reject Change Request:
5) From Document Search/Approvals/My Approval, Filter approvals selecting Change Request TYPE.
   You will see a folder for each account you are an approver for where a document is awaiting approver.
6) Open the folder(s) you are responsible for, click on the document# to open a document;
7) Review the COMMENTS to see what changes are indicated as being made.
   You can also review History (link next to Document Action dropdown) to confirm what was changed.
8) Assign document to yourself from Document Actions dropdown.
NOTE: Assigning the Document to yourself will ensure you see all the Document Actions links that available to you as an Approver.

9) If changes are allowed, Approve document from Document Actions dropdown. If changes not allowed, Reject (Disapprove) Change Request.

NOTE: If any additional changes are needed, you can make edits by clicking the ‘Edit’ button in section and making changes before approving.

10) If approved, the document will route to Purchasing for review/approval.

Additional Things To Know:
If other approvers are in the workflow, action would be same as Fiscal Approver.

Any user with the permission to Create Change Request has access to the document and can initiate a Change Request from the PO so be mindful of this (if something doesn’t look ‘right’).

If the PO is Closed, Purchasing will have to open the PO before a Change Request can be initiated. Before reopening a Closed PO, evaluate if a new PO is more appropriate vs reopening a Closed PO. Keep in mind since invoices can be paid above the PO line item amount (because of built-in tolerances and routing rules), that a Change Request will not always be needed just to match an invoice amount. This should reduce the number of Change Requests that are needed.

*DETAILS OF WHAT CANNOT BE CHANGED ON CHANGE REQUEST DOCUMENT:
Supplier – unable to change supplier on any PO.
Workaround: None. If wrong supplier used, will have to Close existing order (and cancel with that supplier) and create a new one.

QTY and Unit Price on catalog order (depends on catalog setup) -
Workaround: None. But, should be non-issue since invoice can still be processed if it comes in for more (invoice would just follow Failed Matching rules).

Trade-In and Discount – cannot add or delete these fields.
Workaround: None. But don’t expect it to be an issue.
If needs added, can still take discount on invoice;
If needs removed, can still process invoice (invoice would just follow Failed Matching rules)

Can’t Delete Line Item –
Workaround: can change amount to 0.00 (on non-catalog orders);
If catalog order and line item was canceled, will just have to Manually Close after received items have been paid for.

Form Detail – unable to edit, except for Price
Workaround: none. If Detail (other than price) is incorrect and MUST be changed, original PO will have to be Closed and a new PO issued. REQ detail (e.g. account info) is able to be edited. This is specifically talking about the detail on the actual FORM, if order started from a FORM.

External/Internal Notes, Header Level - Can’t edit or delete -
Workaround: can add at Line item level; if note needs deleted at Header Level, system admin will have to open ticket with Jaggaer.

External Communications = read Only to departmental user; editable to Purchasing.
Will be important for department users to add DETAIL Comments explaining what is being changed and if the supplier needs a copy of the revised PO.

DEFINITIONS:
Change Request (aka PO Amendment) – process for making a change to an existing PO that has been fully approved.
| CROSS REFERENCE: |  |