PROCUREMENT SERVICES – CHANGE REQUEST DECREASE

PURPOSE

Requesters will use this process to request decreases on requisitions and Purchase Orders that have already been dispatched. Decreases should be done to disencumber funds that will not be used in association with the Purchase Order. Decreases can be done if (a) items are removed from an existing purchase order, or (b) if funding needs to be disencumbered due to a reduction in the scope of work, or (c) if all invoices have been processed against the PO and the PO can be closed. Prior to creating a change request, verify all previous invoices have been fully processed against the Purchase Order.

Notes:

a. When decreasing a Purchase Order, you can only disencumber fund that are currently encumbered in the PO, not the total value of the Purchase Order. Example: If a PO was created for $50, and Invoices worth $40 have been processed against the PO, you can only disencumber the remaining $10 from the PO.

b. If you would like a Purchase Order to be closed, disencumber all remaining encumbered funds after checking to make sure all vouchers have been fully processed against the PO. Procurement will regularly run processes to close POs whose encumbrance is less than a penny.

c. Change requests for decreases will not go through department or fund approvals. Instead, they will go directly to Procurement for final approval and dispatching.

STEPS

1. Verify Encumbrance and Activity Summary on Purchase Order prior to making any changes. Navigation: Purchasing>Purchase Orders> Review PO Information> Purchase Orders > Activity Summary
2. Navigation: eProcurement > Manage Requisitions. If you navigate to this page often, you can Add to Favorites for easy access.

3. Search for the requisition you are looking to update. Status should be PO(s) Dispatched. Select the Pull down menu [Select Action], then select Edit Requisition. Press Go. You will receive a message
4. To decrease the encumbrance on a Line, decrease the Price for that line. Select any other changeable field to see the change go reflected in the Total. Then, select Check Budget. Once your requisition has passed budget check, select Save and Submit.

5. Select CHGDEC as the reason code, and add in the description why you are completing a change request to increase the PO. **Good Example: Disencumbering remaining funds to close.** Select OK to submit the Change Request.
Note: Change Requests for decreases will not go through workflow. Change order will go through workflow instead of self approving.