PROCUREMENT SERVICES – CHANGE REQUEST INCREASE

PURPOSE

Requesters will use this process to request increases on requisitions that have been sourced to Purchase Orders and dispatched. Increases can be done if (a) additional items are added to an existing purchase order, or (b) if additional funding needs to be added at a Blanket PO at the end of the year due to an unforeseen increase in purchases. **Prior to creating a change request, verify you have the necessary funds in the correct budget.**

Notes:

a. If a change request is due to a change in scope of work, you must upload the new scope of work in the attachments of the requisition.

b. Increase requests are only necessary if your invoice exceeds 10% or $500 (whichever is lesser) of the remaining PO value. You must have funds available in the budget line or you will get a budget error.

c. Shipping Line - Shipping can be added at the time of processing the voucher under the ‘freight’ section as long as funds are available in the budget line.

d. Change Requests for increases will follow the same workflow as the original Requisition. For instance, if you create a purchase order on a grant, the change request will follow the original workflow through OSP. One exception is if you create a requisition under $5,000 it will self approve, but if you increase the same Requisition and the total value goes over $5,000, the change order will go through workflow instead of self approving.

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, then select Edit Requisition. Press Go. You will receive a message
4. To increase the encumbrance on a Line, increase the Price for that line. Select any other changeable field to see the change reflected in the Total. Then, select Check Budget. Once your requisition has passed budget check (Increase amount is in Pre-Encumbrance), select “Save and Submit”. Please note: All requisitions are created as “Amount only”, meaning once the PO is dispatched you cannot change the quantity on the PO. If you originally created a Requisition with a quantity greater than 1, you will need to calculate how much the Price must increase in order to have the Total be the correct amount. See endnote for example.

5. Select CHGAMT as the reason code, and add in the description why you are completing a change request to increase the PO. Select OK to submit the Change Request.
Endnote: Increasing a PO with a quantity greater than 1.

1. Go to the Manage Requisitions page and enter the Edit Requisition Screen. (see instructions above)
2. You originally created a requisition that has been dispatched to a PO for 10 pipettes at $2.00 each. You are adding 5 more pipettes to the order, and will be ordering 15 pipettes at $2.00 each. In **Edit Requisition**, the only cost related field you can change is **Price**, so you will need to calculate the new “price” for your requisition.
   a. \[ \text{New Price} = \text{Quantity} \times \text{Price} \]

   Originally, \(20.00 = 10 \times 2.00\)

   Now, \(30.00 = 15 \times 2.00\)

   To get the new Price, \(30.00 = 10 \times \text{Price}\), solve for \(\text{Price} = 3.00\)
3. **Change the Price field in the requisition line to the price you just solved for.**

![Image of Edit Requisition screen](image1)

4. **Complete the change reason Comment to reflect the change you made.**

![Image of Change Reason screen](image2)

- **Reason Code:** CHGAMT
- **Comment:** Buying 15 pellotes on this order. Changed price to reflect new total cost (15 x 2 = 30, 10 x 3 = 30).
5. **Budget Check, then Save & Submit the change request.**