Change Request Business Process (PeopleSoft Financials 9.1)

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1 BUSINESS PROCESS OVERVIEW

Change Requests are now directly requested through PeopleSoft Financials and will go through the standard approval workflows, eliminating all extraneous paper request processes, will keep the requisition in sync with the Purchase Order, and will allow for tracking of Change Requests. The existing "Change Order Request Form" will only be used for Purchase Orders created before the implementation of the Change Request process, for closes, and for other changes for which there is no Step-by-Step Guide.

2 PURPOSE

Departments will now have the ability to go into PeopleSoft and edit requisitions after Purchase Orders have been sourced, creating a change request. A change request is created when goods or services are added to or deleted from the original scope of work. This change request process will ultimately result in Procurement dispatching a change order to the supplier.

Boston College is an encumbrance University, meaning we create Purchase Orders and Change Orders (both types of contracts) in order to encumber funds **prior** to placing an order for goods or services. Change Orders should not be created for goods and services not associated with the original Purchase Order.

3 HOW TO SUBMIT A CHANGE REQUEST

Change requests must be submitted through PeopleSoft Financials. Please reference the step-by-step guides available on the Procurement Website.

4 TYPES OF CHANGE REQUESTS

1. Decreases
    a. Disencumber funds once goods and services have been received and paid for and you have a remaining balance. ***Note:*** This will put the money back in your budget and the PO will then qualify for the auto close process. This should be done instead of requesting a PO close.
    b. Disencumber remaining funds on Blanket PO's you will no longer be placing orders against for the remainder of the fiscal year.
    c. Item is backordered or discontinued and you have cancelled the order.

2. Increases
    a. 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.
    b. Freight/Shipping costs that were not included in the original quote should be added at the time of submitting or processing the voucher under the 'freight' field. **Note**: budget funds must be available in the budget line.
    c. If additional items associated with the original order are added to an existing purchase order.
    d. If additional funding needs to be added to a Blanket PO at the end of the year due to an unforeseen increase in purchases.
3. When a vendor change is required due to a legal name change or merger/acquisition
    a. This can be done on the requisition if it has not yet been sourced to a Purchase Order.
    b. If the requisition has been sourced to a Purchase Order, the request for change much go through the Change Order Google Intake Form. This change can only be made if no invoices have been processed against the PO. If invoices have been processed please disencumber the funds and create a new PO.
4. Extending dates on a requisition (this will not go through workflow). Only funds 820, 500, and 120 can cross fiscal years.
5. A line should only be cancelled if the item is backordered or the company has discontinued the item. *Note: a line can only be cancelled if it is not the only active PO line.*

5 RULES FOR CREATING CHANGE REQUESTS

1. When creating a change request, attach all supporting documentation in PeopleSoft. For example, if applicable: Sole Source or Vendor Justification Form, Professional Services Agreement Amendments or Extensions, etc.
2. PO Change Orders resulting for a Change Request will be sent to the supplier. If an email address is not specified in the comments, the Change Order will be mailed to the address on file.
3. Distribution Line information cannot be changed.
4. Change Requests cannot be completed on orders placed through SupplyOrg or BC Marketplace; there are currently limited users with access to these systems.

6 TROUBLESHOOT TIPS & TRICKS

1. Before you make any changes, review the PO Activity Summary to understand the value of the PO and see what has been processed against it; the PO Balance Report will not provide you with the necessary details to make the appropriate change request.
2. When you are disencumbering funds, make sure there are no active vouchers against the PO first.
3. You cannot decrease a requisition to a value lower than what has already been invoiced against the PO.
4. If you receive an error hyperlink (for example, next to budget status), click on the word 'error' for more details.

7 HELPFUL QUERIES