Change Request Process Guide

A Change Request (formally known as a Purchase Order Amendment - POA) allows requestors to make changes to a PO that has already completed workflow.

It is important to note:

- A Requestor can initiate a Change Request to make changes to a PO when the PO is <u>not</u> in a closed status.

- If the original requisition was submitted during a different Accounting Period (month), and the G/L for that month is closed, you will need to remove the Accounting Date or your Change Request will be returned by the system. To remove the Accounting Date, click the pencil under PO Information.

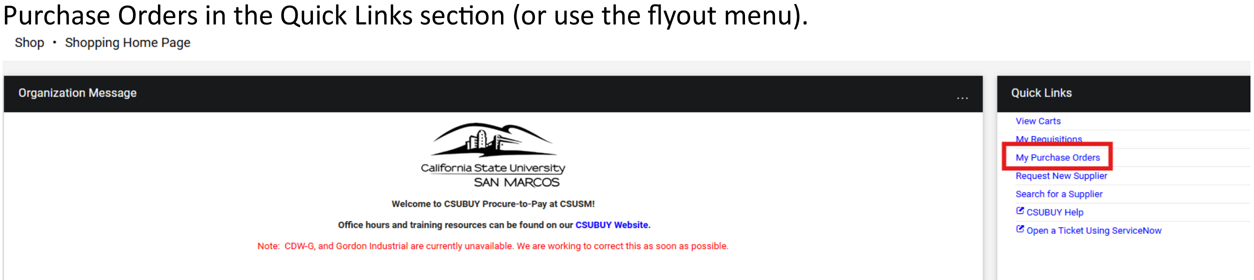
- Change Requests should not be submitted for any Purchase Order that has a pending voucher (the Change Request will have errors). Before making changes, check to see if there are any pending (unpaid) vouchers. Voucher(s) need to be backed out (if appropriate) by Accounts Payable, before a Change Request can be made.

- Change Requests to change a Commodity Code or Chartfield should not be submitted for any Purchase Order that has vouchers matched and paid. Before making changes, check to see if there are any matched and paid vouchers.

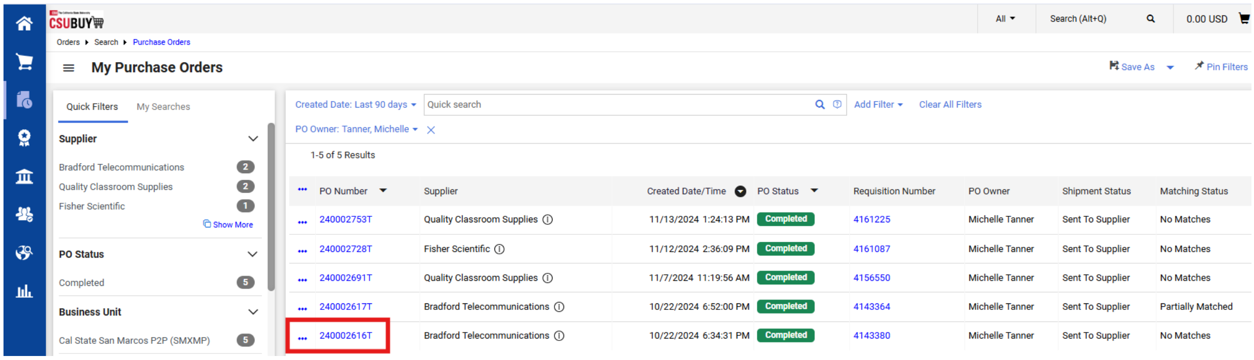
- A Change Request cannot be made for Punchout Supplier Purchase Orders.

Follow these steps to create a Change Request.

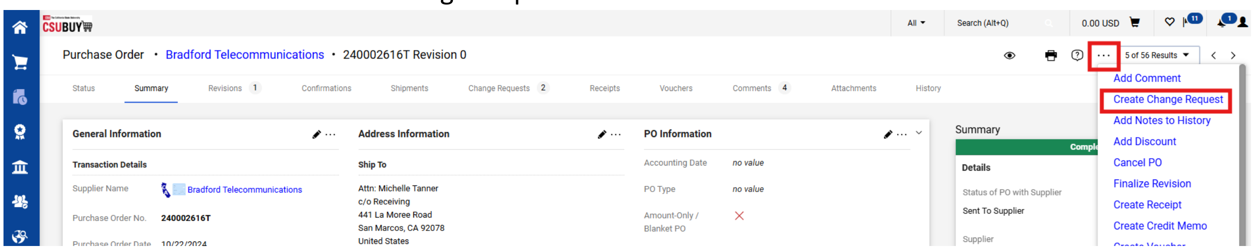
1. From the P2P home page, make sure that you are in the correct Shopping Persona and navigate to My Purchase Orders in the Quick Links section (or use the flyout menu).



2. Select the PO you need to make changes to.



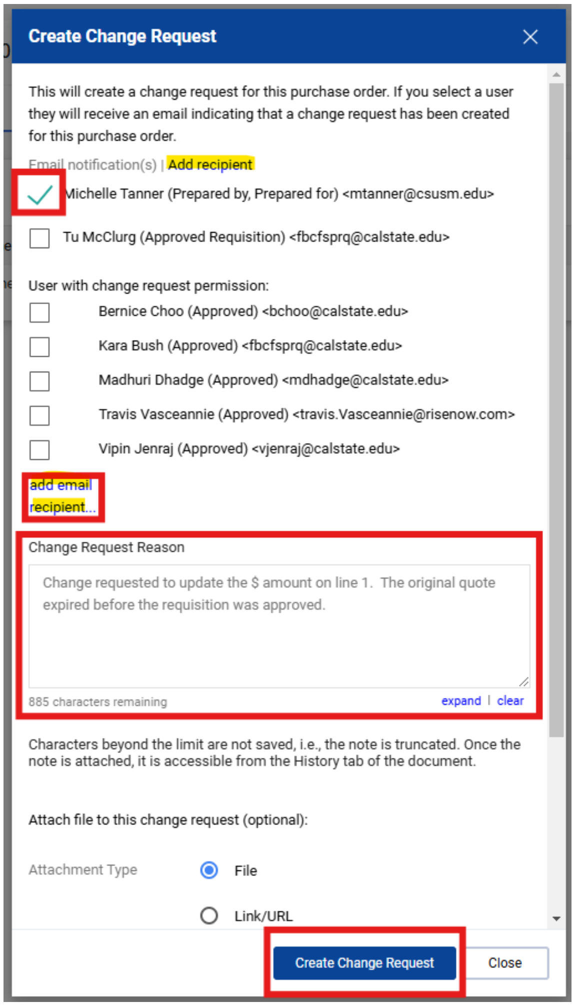
3. Click the … and select Create Change Request



4. Select the users that you want to notify. If the recipient is not listed, click Add recipient to add them. Note: it is suggested (not required) that you select your approver(s) as a recipient so they know a change request will be coming for approval. <u>It is not necessary to add the Buyer</u>.

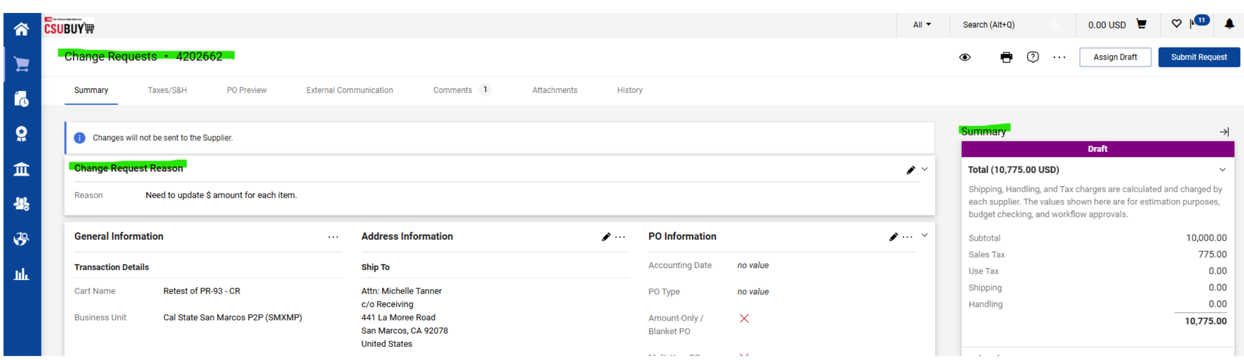
Enter the Change Request Reason. Be very specific about what changes you are requesting to the Requisition/PO and attach supporting documents for the change.

Click Create Change Request.

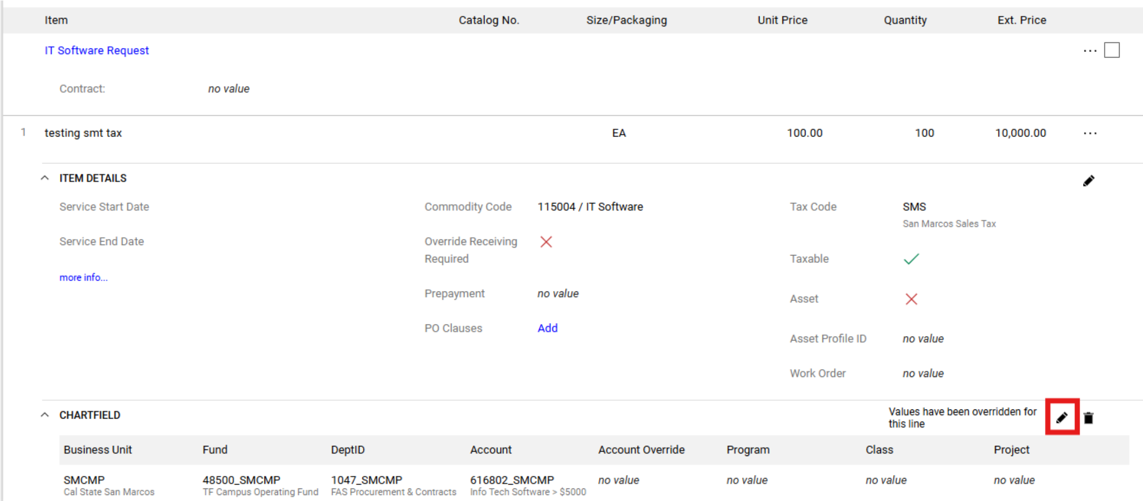


IF YOU ARE ADDING A LINE TO YOUR PO SKIP TO STEP 15. FOR ALL OTHER CHANGES, CONTINUE WITH STEP 5.

5. This will open your original requisition in the Change Request to allow for changes by way of the edit pencils.

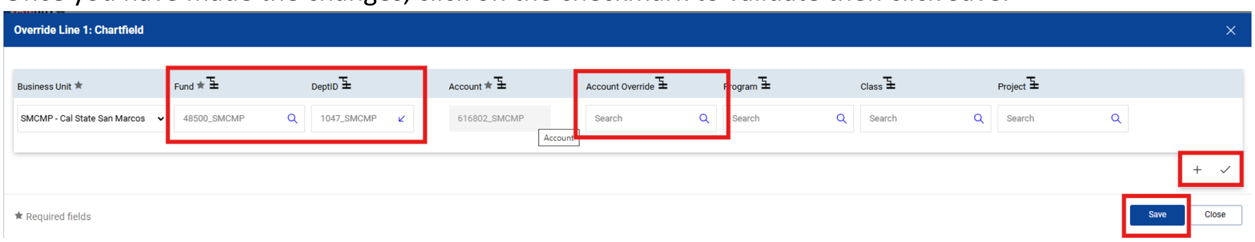


6. **To make changes to your chartfield**, scroll down to the chartfield lines, click the pencil.

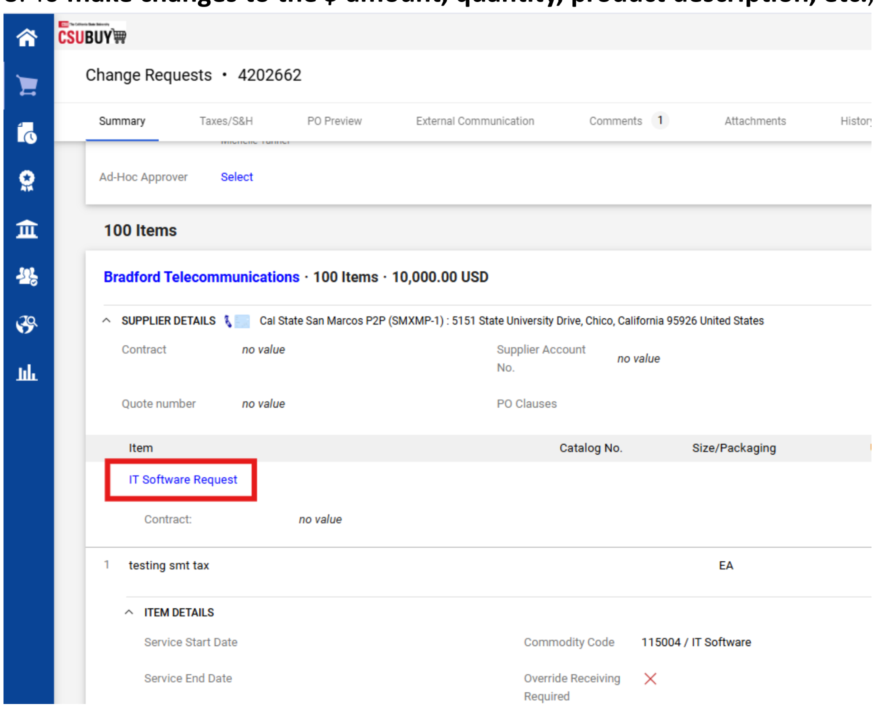


7. You can change the Fund, Dept ID, add an Account Code Override, or split the fund (+).

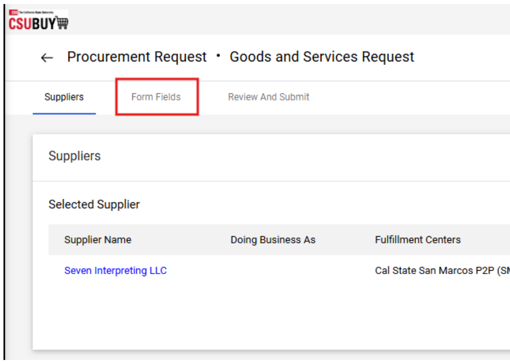
Once you have made the changes, click on the checkmark to validate then click Save.



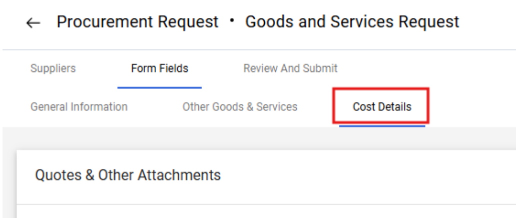
8. To **make changes to the $ amount, quantity, product description, etc.**, click on the form name.



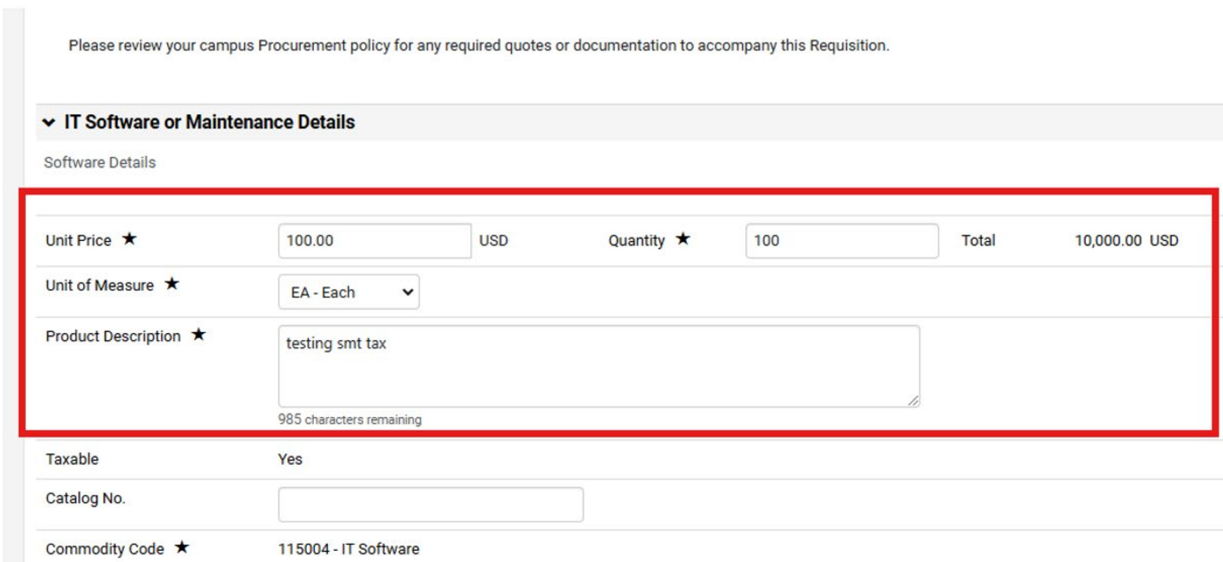
9. Click on Form Fields.



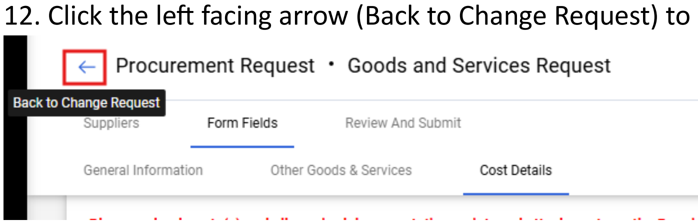
10. Click on Cost Details.



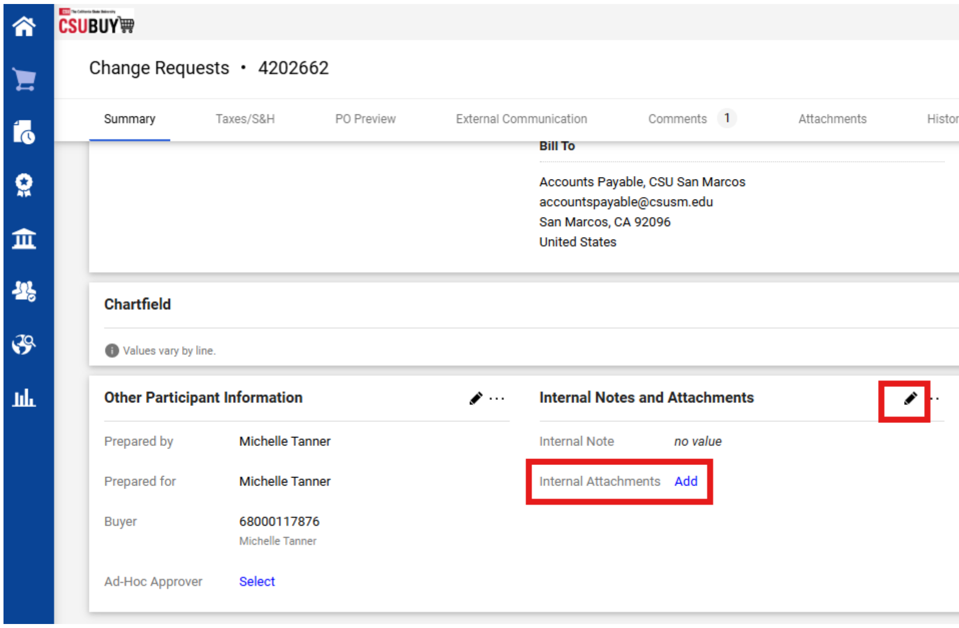
11. Make edits to the Cost Details as applicable then click Save on Change Request at the top right of your screen.



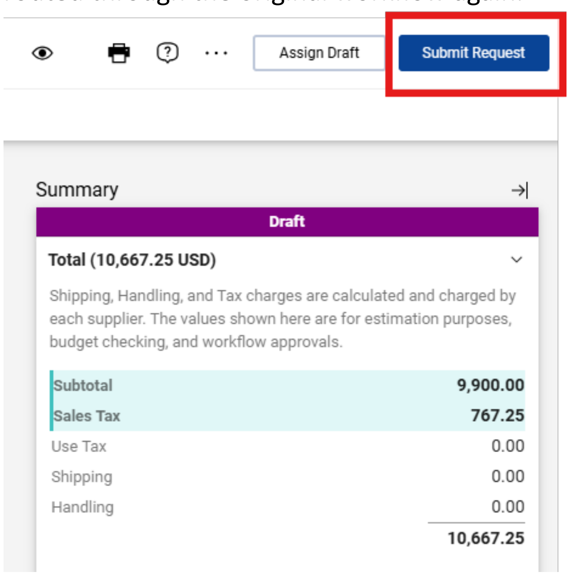
12. Click the left facing arrow (Back to Change Request) to get out of the form.



13. **All Change Requests require Attachments (revised quote, etc.) and/or Internal Notes**.
To add Internal Notes, click the pencil, add your notes, then Save.
To add an Attachment, click Add, add your attachments, then Save. Note: If you have multiple files to attach you will need to repeat this step for each attachment.



14. Once all changes are made, click Submit Request. Once the Change Request is submitted, it will be routed through the original workflow again.

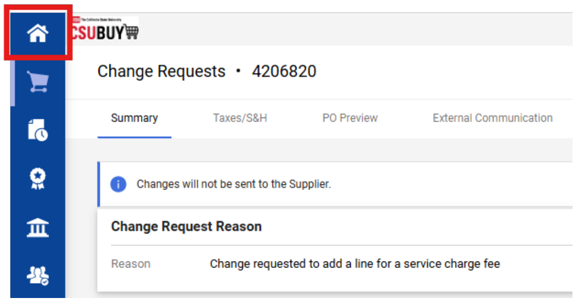


To add line to a PO

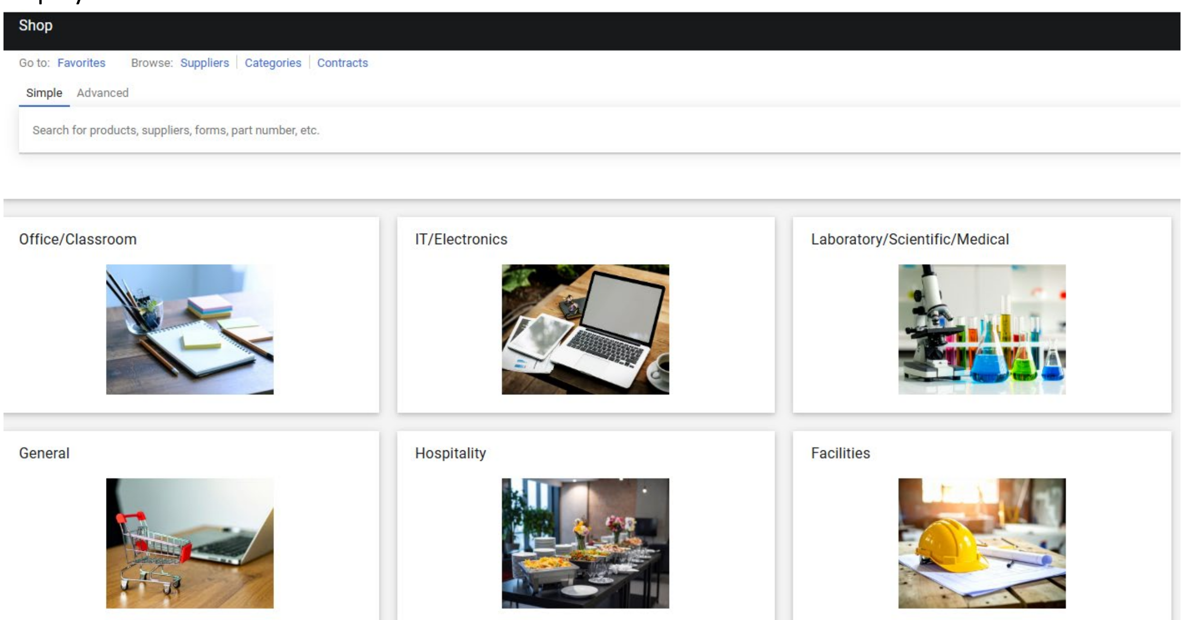
An item (line) can only be added to Purchase Orders that are owned by the logged-in user and that have the same Supplier and Fulfillment Center as the item(s) to be added. **A Change Request cannot be made for Punchout Supplier Purchase Orders**.

15. Complete steps 1 – 4 above. This will open your original requisition in the Change Request. <u>Take note of the Change Request number</u> as you will need to refer to it in a later step.

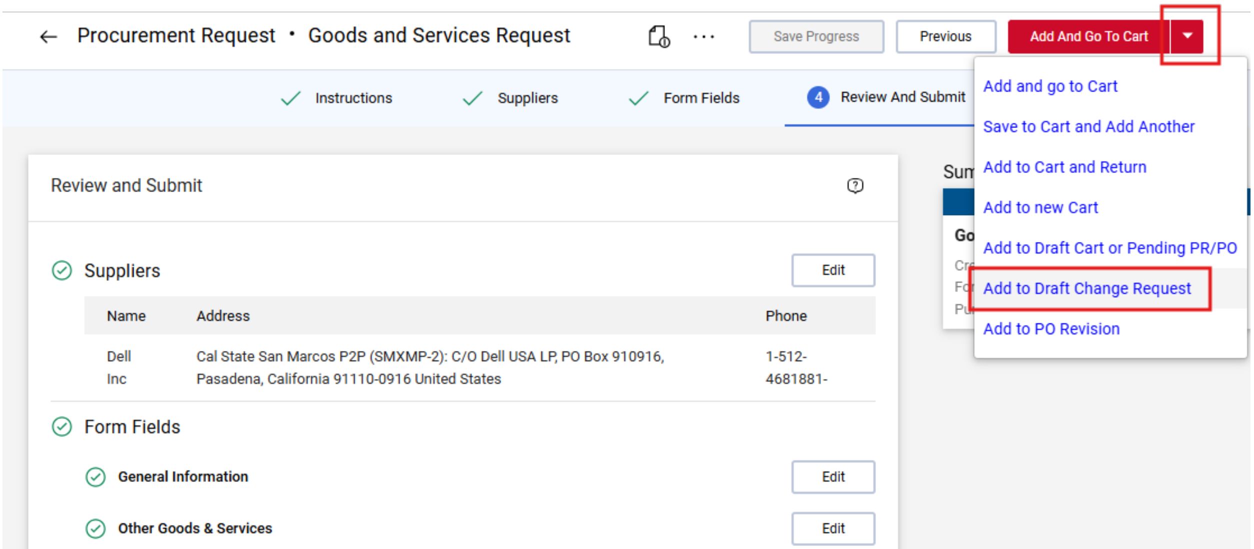
16. Click on the home icon in the flyout to return to the Shopping Home Page.



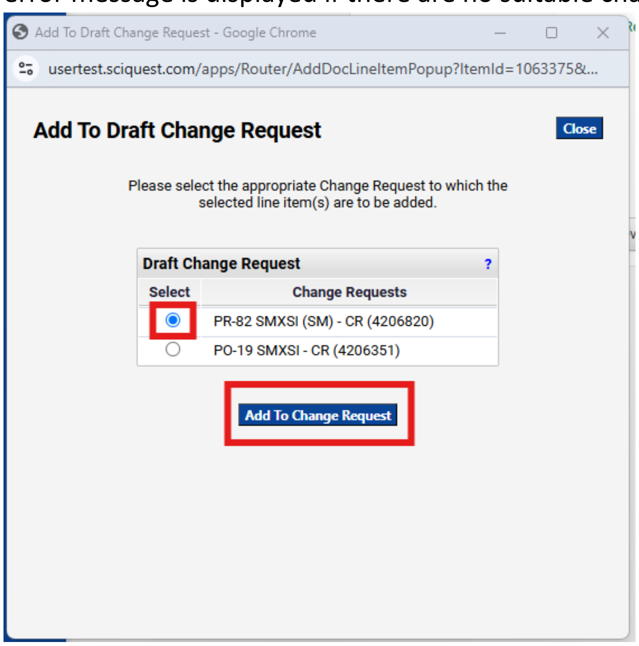
17. Click on the appropriate CSU Form Request type from the Shop menu. <u>The Form Request must align with the Form Request Type of the original Purchase Order (PO)</u>, if not, an error message will be displayed.



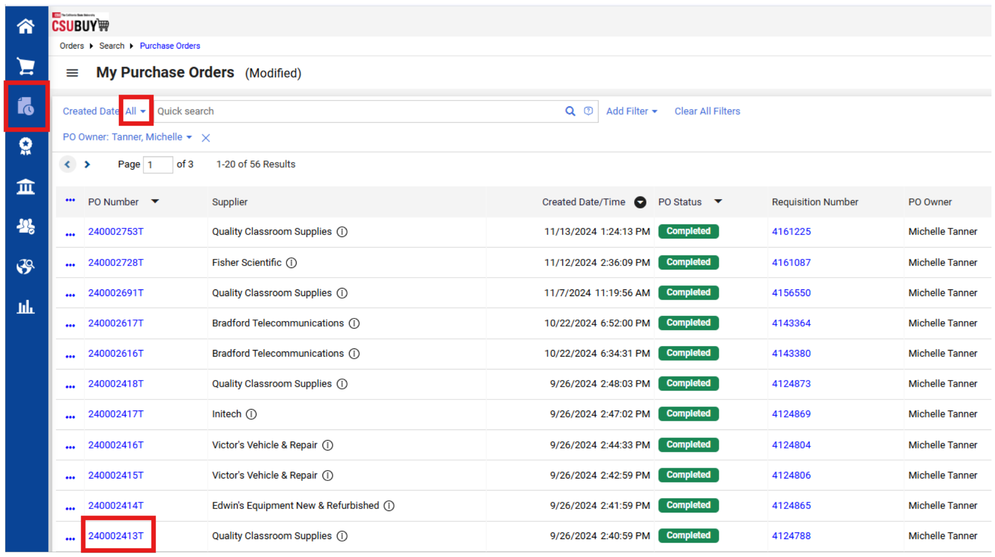
18. Complete the Suppliers and Form Fields pages (using the red Next button at the top right of your screen to move through the pages). Once on the Review and Submit page, click on the drop down for Add and go to Cart and select Add to Draft Change Request.



19. A list of change requests in Draft status that are owned by the logged-in user, with the same supplier as the item(s) to be added is displayed. Select a change request and click "Add to Change Request". An error message is displayed if there are no suitable change requests.

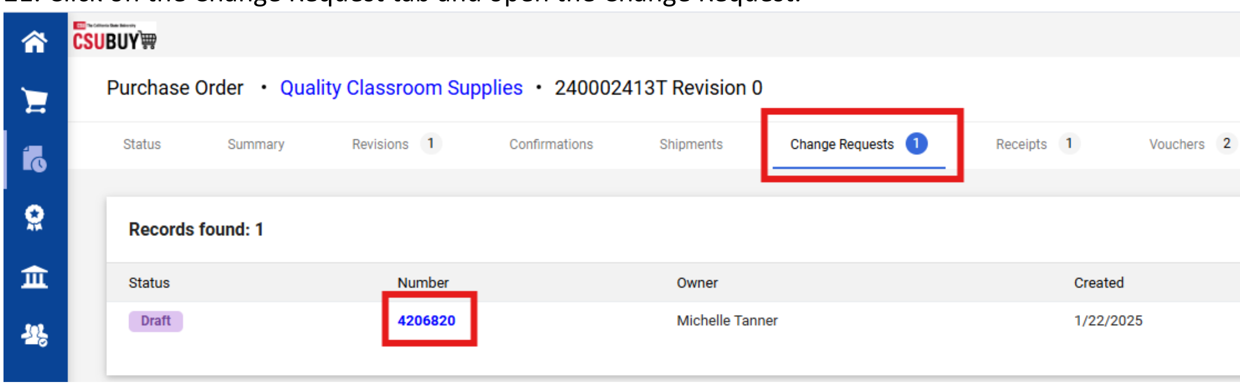


20. Return to the Purchase Order you initiated the Change Request for and open it.



PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner
240002753T	Quality Classroom Supplies	11/13/2024 1:24:13 PM	Completed	4161225	Michelle Tanner
240002728T	Fisher Scientific	11/12/2024 2:36:09 PM	Completed	4161087	Michelle Tanner
240002691T	Quality Classroom Supplies	11/7/2024 11:19:56 AM	Completed	4156550	Michelle Tanner
240002617T	Bradford Telecommunications	10/22/2024 6:52:00 PM	Completed	4143364	Michelle Tanner
240002616T	Bradford Telecommunications	10/22/2024 6:34:31 PM	Completed	4143380	Michelle Tanner
240002418T	Quality Classroom Supplies	9/26/2024 2:48:03 PM	Completed	4124873	Michelle Tanner
240002417T	Initech	9/26/2024 2:47:02 PM	Completed	4124869	Michelle Tanner
240002416T	Victor's Vehicle & Repair	9/26/2024 2:44:33 PM	Completed	4124804	Michelle Tanner
240002415T	Victor's Vehicle & Repair	9/26/2024 2:42:59 PM	Completed	4124806	Michelle Tanner
240002414T	Edwin's Equipment New & Refurbished	9/26/2024 2:41:59 PM	Completed	4124865	Michelle Tanner
240002413T	Quality Classroom Supplies	9/26/2024 2:40:59 PM	Completed	4124788	Michelle Tanner

21. Click on the Change Request tab and open the Change Request.



22. Review the newly added line and details.

If you need to make changes to the chartfield, follow steps 6-7 above.

23. **All Change Requests require Attachments (revised quote, etc.) and/or Internal Notes.**
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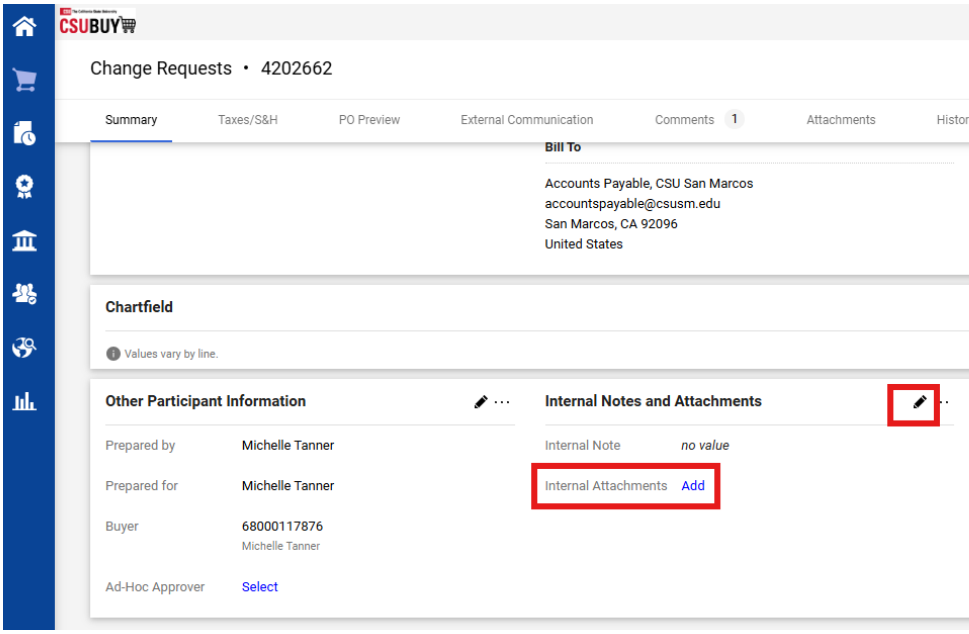

24. Once all changes are made, click Submit Request. Once the Change Request is submitted, it will be routed through the original workflow again.