

There are numerous scenarios which may require a Change Order to be issued against a Purchase Order. The following process should be used when a contract Renewal or Amendment involving an increase in funds is being processed. Do not close/cancel the original Purchase Order. The new Requisition lines for the Renewal or Amendment will be copied to the existing PO. The intent is to keep all of the related spend tied to one Purchase Order. This allows the State Budget Agency to see that funds have been set aside for the Renewal or Amendment while the document is routing for signature/approval. If the situation is not tied to a contract Renewal or Amendment, then same process to copy a new Requisition to an existing Purchase Order may still apply.

A new Requisition covering the fiscal year(s) of the Amendment and/or Renewal document should be entered into PeopleSoft and taken to an "Approved" status with a "Valid" budget check.

Notes about the Requisition:

- There should not be a vendor tied to the Requisition.
- When using the paper based method, the agency should submit the signed Requisition with the Contract Renewal or Amendment paperwork being routed to IDOA for signature. The user should update the Requisition number on the EDS created for the Renewal or Amendment.
- The agency should set the Requisition up with distribution line information or as Amount Only if needed.
- The EDS/Contract ID number and original Purchase Order number should be referenced somewhere on the Requisition (in the description and/or justification).

The existing Purchase Order must be in PO Dispatched or Partially Received status so that it can be edited.

Notes about the Purchase Order:

- The process should be finished (Requisition lines copied to existing PO) after the executed Contract Renewal or Amendment/Renewal is executed.
- If using the paper based method, the EDS number should be populated so that contract information can be verified prior to approval and so the contract can be searched for by the EDS number.
- Does the new Purchase Order line need to be set to Amount Only?

After opening the Purchase Order, if the paper based method was used, be sure the EDS field is populated.

The user should update the Accounting Date on the PO Header to the date the Purchase Order is being edited.

The user must change the drop down to the right of Copy From to "Requisition".

The screenshot shows the 'Maintain Purchase Order' interface. The 'Copy From' dropdown menu is open, with 'Requisition' selected. Other visible fields include Unit: 00300, PO ID: 0010536557, Change Order: 1, PO Status: Dispatched, Budget Status: Valid, and \*PO Date: 11/20/2009.

The user must enter/look up the ten digit Requisition ID number and click Search

The screenshot shows the 'Copy Purchase Order from Requisition' page. The 'Requisition Selection Criteria' section includes fields for Business Unit (00300), Buyer, Vendor ID, Category, Requisition ID (0000042325), and Contract ID. There are also checkboxes for 'Include Reqs With No Vendor', 'Include Inventory Items', 'Stockless Item', and 'Exclude Auto Source Item'. A 'Search' button is present at the bottom left.

The user must select the lines from the Requisition to copy to the Purchase Order by clicking the checkbox at the beginning of the row(s) or the blue Select All link and click Copy to PO.

The screenshot shows a table titled 'Select Requisition Lines' with the following data:

Select	PO Qty	PO UOM	Item	Description	Req ID	Line #	Procurement Card	Schedule Split
<input type="checkbox"/>	9.0000	MON		4 yard containers	0000042325	1		
<input type="checkbox"/>	3.0000	MON		January thru March	0000042325	2		
<input type="checkbox"/>	12.0000	MON		Residential container	0000042325	3		

Below the table, there are checkboxes for 'Select All' (checked) and 'Clear All'. A 'Copy To PO' button is also visible.

A change order will be created and the lines copied will be added to the bottom of the existing Purchase Order lines. The user must click OK to the warning message.

