WIVERSITYOF **EXCHANGE**

Advanced Change Requests

FOR REQUESTER/DPS roles only This guide should be used as a supplement to: "Creating and Processing a PO Change Request"



What this Guide Will Cover

- Reminder: The five basic rules of change requests (see slide 2)
- Changing Funding Sources on a Vouchered Purchase Order (see slide 3)
 - Standard (quantity based) POs (see slide 4)
 - Blanket (amount based) POs (see slide 16)
- Zero dollar lines (subaward example) (see slide 25)
- Change Requests to form-based Purchase Orders (see slide 33)
 - NPOPs (see slide 34)
 - Subawards (see slide 35)
 - Legacy Waiver of Bid Requests (see slide 40)
- Handling Closed Purchase Orders (see slide 50)
 - Standard (quantity based) POs (see slide 51)
 - Blanket (amount based) POs (see slide 57)
- Summary Notes (see slide 63)



The five basic rules of change requests are as follows:

- 1. You can only create a change request on an open, completed purchase order.
- 2. Only one change request can be in process for any PO at a time.
- 3. Change requests go through the same workflow as requisitions. If dollar amounts have been adjusted, the approval workflow will be adjusted for cumulative total dollar amount.
- 4. You cannot change a line that's been fully invoiced and vouchered.
- 5. Always check for the account code since UDX will let you submit a change request without one.

Note: Change Requests should NOT be initiated for the following: Closing or Canceling entire POs, making changes to Catalog Orders.



Changing Funding Sources on an Invoiced PO

- Rule #4 of Change Requests means you cannot change a line that's been fully invoiced and vouchered.
- Because of this rule, a fully invoiced line will not be visible on a Change Request, but it's still on the purchase order! This means caution is needed when changing funding sources in the header of a purchase order, or on any line that has invoices against it.
- Standard (quantity-based) and Blanket (amount-based) purchase orders have different approaches to funding changes.



Changing Funding on an Invoiced PO: Standard (quantity based) POs

- Standard (quantity based) POs need to separate the quantities that have already been paid for (whether you can see them on your change request or not) from those not yet paid for.
- The following slides show two different scenarios:
 - 1. Changing the funding on open lines when at least one other line has been fully invoiced.
 - 2. Changing the funding on open quantities when some quantities on that line have been fully invoiced.





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1	♦ Easy Peel Laser Address Labels, 1	AVE5160	35.23 USD	1 BX	35.23 USD	1 / 35.23 USD	Open	Subtotal	
2	♦- Small Binder Clips, 3/8"	UNV10200	1.29 USD	1 DZ	1.29 USD	1 / 1.29 USD	Net Invoiced		
3	♦ File Folders, 1/3 Cut Assorted, On	UNV12113	20.80 USD	1 BX	20.80 USD	1 / 20.80 USD	Open	Related Documents	
								Requisition: 3465576	

This is a standard (quantity based) purchase order that has been invoiced against line 2.

You need to change the funding source for the open lines.

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You need to change the funding source for the open quantities.

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Change Requests * 3522951





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Change Request

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Changing Funding on an Invoiced PO: Blanket (amount based) POs

- Blanket (amount based) POs count down a lump sum to zero.
- This is most often used for services engagements, such as consultant hours.
- For this reason, when a funding change occurs, it is best to **close out the line** with the old funding to limit it to the amount paid and **move the balance to a new line** with new funding.
- This scenario can also be applied to any non-catalog order by quantity with funding splits and partial invoicing.





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open line (\$41,920.00) for Accounts Payable to voucher against.

There will also only be one line for you to edit on any future change requests.

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What's next?

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Change Requests: Zero Dollar Lines

- POs are quantity based by default they count down a **quantity** of items to zero.
- By checking the **multi-invoice/payment box** at the header, you set the PO to amount based it ignores quantity and counts down the **amount** to zero.
- As a result, if you have that multi-invoice/payment box checked, you cannot start a line at zero dollars. The system believes you have already finished your PO line before it's even started!
- To override this, you must **check** the **PO Type Override (POTO) box** for that line.
- Please Note! If you *add* funds to a zero dollar line on a future change request, you must remember to *uncheck* that box so that it is able to count down to zero.



Purchase Order • UDRT0	00050 Revision 2							🕈 🕜 \cdots 1 of 1 Resu	llts ▼ <
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	• "0" in the Unit Price field						
	"Placeholder" in the Product Description						
	This line is needed if the resulting Purchase Order needs to be increased in the future.						
	For subawards greater than \$25,000, please enter the following details:						

Unit Price = Balance of the Award less the overhead (i.e. \$75,000 = \$100,000 - \$25,000)
 Product Description = Subaward description/comments

Make the necessary changes in the **price and description fields** on each line.

Click Save on Change Request.

Unit Price	1500.00	USD	Quantity	1	Total	0.00 USD	
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ал Ш	Review and Submit	Subaward on [PI NAME] 's prime award from [PRIME SPONSOR] project titled " [ENTER PROJECT] ." This action funds Year XX at a rate of \$XXXXXX.00 . The sub recipient shall perform the work in accordance with the statement of work for the period of MM/DD/YY - MM/DD/YY . Total shall not exceed \$XXX,XXX.00 .			
		 All invoices are required to be received electronically at subaward-invoices@udel.edu. THIS IS AN OFFICE OF SPONSORED RESEARCH SUB RECIPIENT AND THE VENDOR SHOULD NOT RECEIVE A COPY OF THE PURCHASE ORDER; by design, the resulting PO won't be sent to the supplier. The original agreement and statement of work are in OSP. 			
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Changes to Form-based POs

- Subawards, NPOPs and Waivers of Bid Requests (prior to FY23) are done on forms, as opposed to non-catalog orders, which can add and remove line items.
- Change requests involving forms behave differently. In most cases, you will not have the opportunity to make changes without assistance from Procurement Help, especially after a line has been fully invoiced.
- Please refer to the following slides for best practices in managing change requests for each of these payment types.

Changes to Form-based POs: What about NPOPs?

- Change requests are NOT suggested for NPOPs (Non-PO Payments)
- The purpose of an NPOP is different than a purchase order: An NPOP is only a vehicle for payment.
- The distinction between a PO and an NPOP is whether the payment is sourceable: are there multiple suppliers? Are price and terms negotiable?
- NPOPs can be used to make scheduled payments over a period of time, such as for a lease.
- If an NPOP with recurring payments has a funding source change, please request that Procurement Help *close* the existing NPOP, releasing the remaining funds, and then submit a new NPOP for the balance with the new funding source.

Changes to Form-based POs: Subawards

- Each subaward form adds two lines to the purchase order, one for each account code: 153200 and 153300
- Users are instructed to zero out a line with no funds (whether or not it will be increased later), and check the POTO box (see slides 25-32)
- For users who want more visibility regarding each year's funding, they are instructed to add multiple forms to their initial requisition
- If the funding changes during the life of the subaward, Procurement Help is required to add an additional form to the subaward as illustrated on **slides 36-39**.

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							1,600.00 USD			26,50
	2	Second year award		1,500.00 USD	1	1,500.00 USD	n/a / 1,500.00 USD	Open Net Invoiced	Related Documents	
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Funding has changed for this partially invoiced <u>subawards</u> . Please add blank lines for a change request.	This will add a comment to the document. If you select a user they will receive an email indicating comment has been added to the document. Email notification(s) Add recipient	that a	Supplier MARYLAND UNIV OF - EASTERN SHORE	
	Dottie DPS (Prepared for) <ud-mart@udel.edu> Kristen Dickering (Prepared by) <knick@udel.edu></knick@udel.edu></ud-mart@udel.edu>		Total (26,500.00 USD)	
896 characters remaining expand clear	Procurement Help <udexchange@udel.edu></udexchange@udel.edu>		Subtotal	
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	Attachment Type 💿 File 🔿 Link/URL File Name		Related Documents	
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Once Procurement Help has added two new placeholder lines, you can create a change request.

Lines 1 and 2 can be reduced to the *paid* amount.

The new funding can be added to lines 3 and 4 only with the POTO box UNCHECKED to allow for invoicing after they are increased.

Changes to Form-based POs: Legacy Bid Waivers

- On July 1, 2022, Procurement Services transitioned to using Non-Catalog POs for bid waivers, with a required attachment justifying the waiver.
- Legacy UDX Waiver of Bid Request forms (WOB orders created *before* 7/1/2022) required users to check off up to ten boxes, depending on how many line items are needed on the PO.
- If additional lines were needed, users were advised to add an additional bid waiver form to their draft cart.
- This form made change requests difficult to handle, especially for later additions and deletions from the form, which is why the transition was made to Non-Catalog orders with an attachment..
- Changes to Legacy Waiver of Bid Request forms *created prior to 7/1/2022* are handled as illustrated on **slides 41-49**.

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	6	I I						
		Line 1						

First, you will need to create a Change Request on the PO, then click on the *blue Waiver of Bid Request Form link* in the line items area to navigate to the **Waiver of Bid Request form** itself.

Once in the form, it is tempting to uncheck the box on Line 5, but this will cause major issues with PeopleSoft.

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		Email notification(s) Add recipient
		Kristen Pickering (Prepared by, Prepared for) <kpick@udel.edu></kpick@udel.edu>
9	38 characters remaining expand clear	Procurement Help <udexchange@udel.edu></udexchange@udel.edu>
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📑 Waiver of Bid Request

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Handling Closed Purchase Orders

- NOTE: Any administrative edits to purchase orders performed by Procurement Help in order to allow a user to initiate a change request do NOT move through to PeopleSoft. They exist only to open a line or create a line to edit on a Change Request.
- Change Requests must still go through all required approvals before they are merged with the PO and sent through to PeopleSoft.
- If you have questions or issues with creating a change request, please do not tag Procurement Help on the PO. Instead, send training-related questions to procurement@udel.edu or bring them to a drop-in help session for the support team to assist.

Handling Closed Purchase Orders: Standard POs

- Standard (UDS) POs soft close once the *quantity* is fully invoiced.
- You will be able to initiate a change request if the PO has been vouchered under or over the PO amount, but not if it has been vouchered exactly.
- Requesting that Procurement Help reopen a fully invoiced/vouchered PO will not allow you to initiate a change request since there is still nothing to change.
- ALWAYS submit the purchase order for the full amount budgeted for the expense.
 Please do NOT try to "trick" the system by adding an extraneous line item just to keep a PO open for potential future expenses.

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Handling Closed Purchase Orders: Blanket POs

- Blanket (UDB and UDR) POs soft close once the *dollar* amount is fully invoiced.
- You will be able to initiate a change request if the PO has been vouchered under or over the PO amount, but not if it is vouchered exactly.
- Requesting that Procurement Help reopen a fully invoiced/vouchered PO will not allow you to initiate a change request since there is nothing to change.
- ALWAYS submit the purchase order for the full amount budgeted for the expense.
 Please do NOT try to "trick" the system by adding a penny or other nominal amount to the line just to keep a PO open for potential future expenses.

Records	found: 1, Totaling: 15,350.00 US	SD						Details	
Voucher No	b. \downarrow Supplier Voucher No.	Voucher Date	Due Date Vou	icher Type	Payment Status	Voucher Total	Invoiced By	Supplier Status	
IT001099 🖸	overinvoice	11/16/2022	11/16/2022 Vou	icher	In Process	15,350.00 USD	Pickering, Kristen L	Sent To Supplier	
								Supplier	
Line Deta	nils							JASCO INC	
Line No.	Product Name	Catalog No	o. Unit Price	Qty/UOM	Extended Price	Voucher Qty/Co	ost Status	Total (14,640.00 USD)	
1	MPTC-511 six position in-line Peltie temperaturecontrol system	er 7069- J011A	9,500.00 USD	1 EA	9,500.00 USD	n/a 9,500.00 US	/ Net SD Invoiced	Subtotal	14,64
2	🅞 Labor	Labor	2,370.00 USD	1 EA	2,370.00 USD	n/a / -630.00 US	SD Open / Net		14,64
						3,000.00 US	SD Invoiced	Related Documents	
3	Installation and Training		1,850.00 USD	1 EA	1,850.00 USD	n/a 1,850.00 US	/ Net SD Invoiced	Requisition: 3621847	
4	🗈 Travel Zone 1 0-100 Miles from	travel	920.00 USD	1 EA	920.00 USD	n/a / -80.00 US	SD Open	Voucher: IT001099	
	Service Center					n/a	/ Net	What's next?	

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Changes will not be sent to the Supplier.								Draft	
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JASCO INC • 2 Items • 3 290 00 USD						🗆	Change	e Request Reason Requ	iired
	Catalog No	Size/Packaging	Unit Price	Quantity	Ext Price		Total (3,29	0.00 USD)	
1 Labor	Labor	EA	2 370 00		2 370 00	🗖	Subtotal		3,2
	Labor		2,370.00		2,370.00				3,2
2 Travel Zone 1 0-100 Miles from Service Center	travel	EA	920.00	1 EA	920.00	…	Related Do	cuments	
							Purchase Or	rder: UDBT000124	
							Requisition:	3621847	
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Records I	ound: 1, Totaling: 15,350.00 USE)						Details	Crea Crea	ate Quantity ate Cost Rec
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IT001099 🖸	overinvoice 1	1/16/2022 11,	/16/2022 Vouc	cher	In Process	15,350.00 USD	Pickering, Kri	sten L Sent To Sup	oplier	
Line Deta	ils							Supplier JASCO INC	:	
Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/0	Cost Stat	Total (15,3	350.00 USD)	
1	MPTC-511 six position in-line Peltier temperaturecontrol system	7069- J011A	9,500.00 USD	1 EA	9,500.00 USD	n/a 9,500.00 (a / Net USD Invo	Subtotal		15,
2	🕞 Labor	Labor	3,000.00 USD	1 EA	3,000.00 USD	n/a 3,000.00 (a / Net USD Invo	biced		15,3
3	Installation and Training		1,850.00 USD	1 EA	1,850.00 USD	n/a	a / Net	Related Do	ocuments	
						1,850.00	USD Invo	Requisition	: 3621847	
4	Iravel Zone 1 0-100 Miles from Service Center	travel	1,000.00 USD	1 EA	1,000.00 USD	n/a 1,000.00 l	a / Net USD Invo	biced Change Red	juests: 3652687	
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		Show comments for	Purchase Order	• +	Details	
Robert Deguarter 11/16/2022 11-EE-26 AM		Durchase Order UDDT		6	Supplier Status	
		Purchase Order - ODB	Comment Added		Sent To Supplier	
Email sent: Procurement Help <udexchange@udel.edu></udexchange@udel.edu>	to line 3 (installation and Training) so that w	/e may initiate a change request.			Supplier	
1					JASCO INC	
				_	T-A-1 (45 050 00 U0D)	
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Contract no	PO N	umber UDBT000124					Total (1,850.01 USD)	
Quote number QU)-33620-P0Y5H2-1						Subtotal	1,8
ltem		Catalog No. Size/Pa	ackaqing Unit P	Price Ouantity	Ext. Price			1,8
1 Installation and Train	ing	EA	1,850	0.01 1 EA	1,850.01	🗆	Related Documents	
^ ITEM DETAILS							Purchase Order: UDBT000124	
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In Summary:

- If a PO has been invoiced and changes to funding source are necessary, leave the header intact and make any changes at the line.
- For blanket or split funding, consider closing out a line to the vouchered amount and creating a new line with the new funding source and line balance.
- Remember to **uncheck** the POTO box if *adding* funds to a UDR or UDB line that was initially set to \$0.
- Forms require special handling and may need assistance from Procurement Help to add lines for funding changes.
- Procurement Help comments are only for requesting specific actions and notfor questions or training support (instead, email procurement@udel.edu).

Questions:

procurement@udel.edu

Resources:

- Procurement Services Website
- <u>Creating and Processing a PO Change Request</u>
- <u>The PO Type Override (POTO) Box</u>
- <u>About Procurement Help:</u> What it is and when to use it

