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.

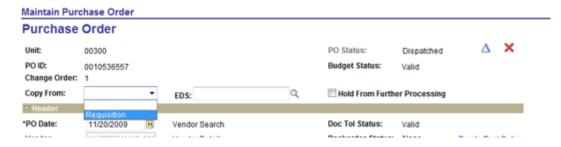
Notes about the Purchase Order:

- 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?

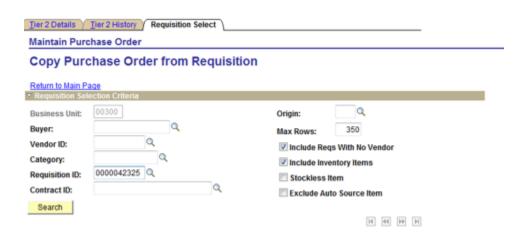
After opening the Purchase Order, if the paper based method was used, be sure the EDS field is populated.

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

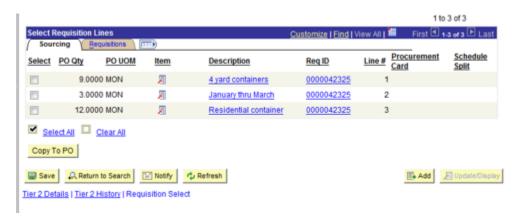
The user must change the drop down to the right of Copy From to "Requisition".



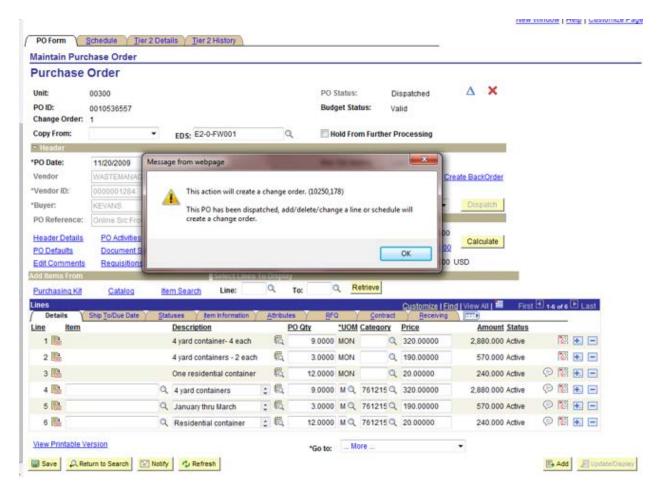
The user must enter/look up the ten digit Requisition ID number and click Search



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.



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.



The user should click on the blue PO Activities link to enter a comment as to why the change order was created (complete the Due Date and the Comment fields) and click OK to return to the Maintain Purchase Order panel.

Before saving, the user must make any adjustments needed and take the Purchase Order back to PO Dispatched status:

Tier 2 Tab – make sure M/WBE/IVOSB subcontractor information (taken from the contract/EDS) is accurate

Leased Asset – review for accuracy

Approve – may require IDOA approval if over agency delegation. Submit a GMIS issue with the pertinent details (EDS/Contract ID, BU, PO Number, and reason for increase) to request it.

Finalize - will relieve any difference between the pre-encumbrance and the encumbrance

Budget Check – will encumber the Purchase Order

Dispatch – run the process and send a new copy of the Purchase Order and the contract document to the vendor