

PO Change Orders Workflow for Senior Buyers Quick Reference Guide

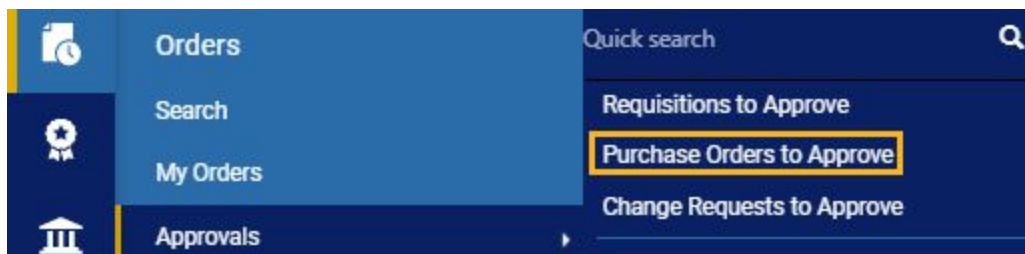
For more information and training resources, please see the [BearBuy website](#).

Effective August 24, 2020, PO change orders over \$25,000 submitted by Change Order Preparers will be routed to a senior buyer for review and approval since the amount exceeds the delegation granted to Change Order Preparers.

Note:

- Change orders \geq \$25,000 may be assigned even when the amount is not modified (i.e. other information modified).
- **The following forms are an exception:** 1) Payment Request, 2) Subawards (UC and Non-UC), 3) Recurring Payment, and 4) After the Fact.
- Please be sure that justification (comment or attachment) is included if the amount is increased.

To check if any PO change orders over \$25,000 were routed to you, navigate to **Orders | Approvals | Purchase Orders to Approve** using the navigation menu on the left hand side of BearBuy.



Upon reviewing the PO, you can modify it accordingly, **assign it to yourself**, and then select **Approve/Complete Step** to approve it.

PO/Reference No. **BB99000996 Revision 10** Available Actions **Assign to myself** **Go**

Supplier **XEROX CORPORATION.**

Status Purchase Order Revisions **PO Approvals** Shipments Change Requests Receipts Invoices / Vouchers Comments (10) Attachments History

Submitted
Yura Tamano-UIT
8/17/2020 11:49 AM

RevisePO
Completed ✓

Change Order Approval
Active
View approvers

PO Distribution
Future →
Expedite

SendPOExport
Future →
Expedite

Finish
8/20/2020 11:02 AM
Expedite

PO/Reference No. **BB99000996 Revision 10** Available Actions **Approve/Complete Step** **Go**

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8/17/2020 11:49 AM

RevisePO
Completed ✓

Change Order Approval
Active
BFS-TRAINING108 TEST
View approvers

PO Distribution
Future →
Expedite

SendPOExport
Future →
Expedite

Finish
8/20/2020 11:02 AM
Expedite

Please note that there is no return feature. If you do not approve of the changes made to the PO, modify the PO back to original (you can find this information in the History tab) and add a comment to the Requestor.

Supply Chain Management

Essential notes from the [Change Order Preparer User Reference Guide](#):

Overview

Buyers and Change Order Preparers (CPO) perform PO changes in BearBuy. Changes are made to the PO, and appropriate documentation is attached that evidences the change approval.

During the process of making a PO Revision, the Change Order Preparer should analyze the PO along with any associated Vouchers in BearBuy prior to making the change. You cannot change chartstrings on vouchered or partially vouchered lines. You cannot Cancel or decrease PO amounts below a previously vouchered total (regardless of the line's original value).

Fundamentals

PO Change Orders do not clear Match Exceptions. Match exceptions must be reviewed and approved. A PO change order may not be able to be paid based on past match exceptions.

Reasons for PO Change Orders

- Modify Chartstrings (unvouchered)
- Encumbrance removal at the line level
- Increase a Service Order value as allowed in a contract
- Cancel a Line (unvouchered)
- Decrease Qty or Amount
- Cancel a PO (unvouchered)
- Extend the end date on a services order
- Add a line to a PO

Situation	Action	Task	Change PO?
Billed for greater quantity than PO.	Invoice Fails Matching.	Match Exception Preparer Review. Review receipts and create returns/credit memos if necessary.	No
Billed for greater amount than PO.	Invoice Fails Matching.	Match Exception Preparer Review. If Invoice is correct, Approve. Consult with Supplier and Requestor to see if there will be future invoices. Discuss new orders vs. change orders.	Maybe
Funding changed on an Order that has not been vouchered.	Departmental Request outside of BearBuy.	Create Change Order.	Yes
Funding changed on an Order that has been vouchered.	Departmental Request outside of BearBuy.	Create Change Order, but decrease vouchered line and add new line item amount and new chartstring.	Yes
Need additional item on Non- Catalog Order or service for less than \$10k.	Departmental Request outside of BearBuy/BFS.	Create Change Order.	Yes
Need additional item on Non- Catalog Order or Service for more than \$10k.	Request Buyer Change Order. This cannot be done by a COP.	Create Change Order.	Yes
Need additional item on Catalog Order.	Departmental Request outside of BearBuy/BFS.	Create New catalog Requisition.	No
Cancel an Order that has not been received or vouchered.	Departmental Request outside of BearBuy/BFS.	Go to the PO and choose the Cancel PO Button.	Yes
Cancel a line that has not been received or vouchered.	Departmental Request outside of BearBuy/BFS.	Create Change Order.	Yes
Payment Terms are incorrect.	Departmental Request outside of BearBuy/BFS.	Create Change Order.	Yes
Supplier did not receive Order.	Comes from a Request outside of BearBuy.	Create Change Order.	Yes
Change order over \$25k submitted by Department COP.	Purchase Order Approval.	<p>Option A) Change requested is not allowable under a scenario above, reverse the changes and financial commitment to no more than the currently vouchered total on each line. Attach documentation/reasons and approve the edited amount. Notify Requestor and COP of actions and next steps per scenarios above.</p> <p>Option B) Change requested is allowable. Attach appropriate justifications, documentation for change and approve change requested.</p>	Maybe