Creating a Change Order

Throughout the fiscal year, services allocated against a purchase order may increase or decrease. You can adjust an approved purchase order by submitting a change order against the purchase order.

1. From the View Purchase Order screen, select the brick near the PO number, then select Purchase Order, then Create Change Order.

2. At the top of the next screen, in the Change Order Reason field, fill in a brief description of the reason for the change order. Ex:
   - “Decreasing blanket order by $15,000”
   - “Invoice $1,000 more than requested. Add’l services were needed”
   - “Delete order line for Widgets 2.0. Items not needed”
3. Scroll down to edit the lines of the purchase order by first selecting the type of line you are needing to edit. For goods, select Goods Lines; for services, select Service Lines.

![Table]

| Goods Lines | Service Lines | Tax | Retention Terms | Prepaid Details | Attachments |

4. On the related line, enter changes to total quantity, total amount, or unit cost. The amounts enter should reflect the NEW amount/quantity/unit cost, not the difference between the original and adjusted. (See page 2 for more detail, if needed)

5. If applicable, select Attachments to add any new documentation related to the change order for your approvers to review:

![Attachments]

Once submitted, your change order will go through an approval process. The requestor will receive notification from Workday when approvals are complete and Purchasing will issue the change order.
**Tips for Change Orders**

- **For changes in amount**, you will want to enter the new total, not the difference between the original total and adjusted total. Ex: If you are decreasing a service line of $10,000 by $6,000, on the change order, you will change the ordered amount to $4,000.

  ![Change Order Example](image)

  **NOTE:** If a purchase order has already been partially invoiced, as in the example to the left, you cannot reduce the purchase order line to less than what has already been invoiced.

  In the example, you would only be able to reduce the PO to a minimum of $1,067.79.

- **To add or remove a good or service line from a purchase order**:

  ![Add Remove Line Example](image)

  **To add a line to the purchase order**, click the plus symbol.

  **To delete a line from a purchase order**, check the Cancel PO line button on the line you wish to delete.

- **To change the cost center**: cancel the original PO line and re-enter a new line with a new cost center.