## **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.

> Purchasing Department purchasing@simmons.edu

## Creating a Change Order

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

View Purchase Order							
Purchase Order PO	0012262						
<ul> <li>Summary</li> </ul>		Actions	$\rightarrow$	Purchase Or	der P		
Company	Simmons Coll	Purchase Order	>	Close			
Purchase Order Type	(empty)	Accounting	>	Copy	Issued		
Supplier	B&G Restaura	Favorite	>	Issue	Simmons		
Currency	USD	Return	>	Printable Version	College Company		
Document Date	08/21/2018			Document Date	08/21/20		
Line Total Amount	40.00			Purchase Order Type	(empty)		
Requisition Type	Standard Purc			Supplier	B&G Restaurar Supply		

- 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"

Create Change (	Order					
Purchase Order PO-0016	340					
<ul> <li>Change Orde</li> </ul>	er Reason					
Comments						
<ul> <li>Summary</li> </ul>		<ul> <li>Terms and</li> </ul>	Taxes		<ul> <li>Contact Inf</li> </ul>	ormation
Company	Simmons College Company	Payment Terms	× Net 45	$\equiv$	Issue Option	× Print i≡
Supplier	B & H Foto & Electronics Corp.	Due Date	MM/DD/YYYY 🖻		Buyer *	🗙 Anastasia Thrush 🚥 🗄
Currency		Default Payment Type	ACH		Bill-To Contact	X Anastasia Thrush
Document Date	* 09/30/2021	Override Payment Type		Ξ	Bill-To Contact Detail	Anastasia Thrush
Change Order Creation Date	09/30/2021	Credit Card	(empty)			V 300 The Ferwar Boston MA
Change Order Total	400.00	Supplier Contract		:=	bill-10 Address	02115-5898 United States of America
Tax Amount	0.00	Default Tax Option	select one	*	Ship-To Contact	X Anastasia Thrush … :=
Freight Amount	0.00	Default Tax Code		:=	Ship-To Contact Detail	Anastasia Thrush
Other Charges	0.00		Undate Tax		Ship-To Address	× 300 The Fenway Boston, MA
Requisition Type	Blanket Purchase Orders					02115-5898 United States of America
					Memo	Please contact John Smith at (555) 555-5555

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.

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 entered should reflect the NEW amount/quantity/unit cost, not the difference between the original and adjusted. (*See page 3 for more detail*)
- 5. If applicable, select Attachments to add any new documentation related to the change order for your approvers to review:

Goods Lines	Service Lines	Tax	Retention Terms	Prepaid Details	Attachments	
Attachme	nts					
6. Click	Submit					

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.

Goods	Goods Lines Service Lines Tax Retention Terms Prepaid Details Attachments										
Service	Service Lines 2 items										
Line	*Item and Category	Tax	Tax Recoverability	Amount							
1	Item Description Blanket purchase order for paint and painting supplies, FY 19: main campus. Spend Category * Paintings & Related (530505)	Tax Applicability		Ordered 4,000.00 Received 0.00 Invoiced 1,067.79							



• To add or remove a good or service line from a purchase order.

