ePro PO Change Request Process Overview
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What PO's are eligible for processing PO Change Requests?

- The PO must be dispatched before a change request can be created.
- If the PO has been partially or fully received, only the due date and quantity can be changed. Note: the new quantity on the change request cannot be less than the received quantity.

Who has access to the ePro PO Change Request process?

End-users that have access to ePro Manage Requisitions also have access to the PO Change Request process.

What changes can be made using the PO Change Request process?

- Cancel a PO line item
- Change Description of line item
- Change the Due Date
- Change the "Ship to"
- Change Quantity
- Change Price

What changes <u>cannot</u> be requested utilizing the PO Change Request process?

- Adding a new line item
- Cancellation of the entire PO (must request cancellation of individual line items)
- Changes to the Distribution line (chartfield, account, location code)
- Vendor location changes
- Category Code changes
- Changes to the description on UCLIN Formulary orders

Once the PO is partially or fully received, what changes can still be made using the PO Change Request process?

- Change the Due Date
- Change Quantity - the new quantity cannot be less than the received quantity
- Note: System will allow the creation of a request to cancel a line item that has been received, however, the request will error out during the automated process

What other restrictions apply when utilizing the PO Change Request process?

- Limited changes are allowed on punchout orders and UCLIN Formulary orders
    - Changes to the description and to contract pricing are not allowed
- Changes to Animal Express orders (ARC) should <u>not</u> be created utilizing the ePro PO Change Request process
- Requests to increase a line item that has already been received and paid "in full" should <u>not</u> be created
- Do <u>not</u> request a lower price than has already been paid
- Do <u>not</u> request an increase to quantity on Blanket Orders (i.e., Distributed by Amount orders must have a quantity of 1)

End-User Responsibility?

- Is this a valid request? Should this change be made to the PO?
- What justification information do I need for this change? (i.e., vendor advised item is no longer available; vendor advised no additional payments are expected)

- If this request is to lower the Quantity, confirm the reduced quantity is not less than the already received quantity (Po Activity Summary – Receipt tab)
- If this request is to lower the Price, confirm the requested amount is not less than the already paid amount (PO Activity Summary – Invoice tab)
- Do not request an increase to the Quantity if:
  - The item quantity has already been received and paid in full
  - The item is a blanket order (distributed by amount orders must have a quantity of 1)

What steps does a PO Change Request go through?

- End-user creates PO Change Request
- If request will increase the total value of the PO, the PO Change Request routes to the appropriate ePro funding approvers and applicable commodity approvers
- Buyer listed on PO reviews PO Change Request
- Once the PO Change Request is fully approved, an automated process creates the PO Change
- Logistics Acquisition dispatches PO Change notice as appropriate

Who approves PO Change Requests to increase the quantity or price on the PO?

- Any change request that increases the total amount of the PO will route to the appropriate departmental and commodity approvers utilizing the existing ePro Requisition Approver roles.
- Once the ePro approvals have been completed, the buyer that created the PO will review the PO Change Request and complete the final approval.

Who approves PO Change Requests that do not increase the value of the PO?

- Only the buyer listed on the PO will be responsible for approving PO Change Requests that do not increase the total value of the PO:
  - DEP PO Change Requests will be approved by the department requester/buyer;
  - ACQ PO Change Requests will be approved by the Logistics Acquisition buyer
- There is no ePro departmental or commodity approvals for changes that will not increase the value of the PO.

Once the PO Change Request is reviewed and approved by the buyer, what happens?

An automated batch job will run daily to create the PO Change. The automated job will be monitored by the Purchasing Help Desk. For any PO Change Request that cannot be processed (i.e., requested quantity is less than quantity already received; attempted to change price on UCLIN Formulary item), the end-user will be contacted by the Purchasing Help Desk advising them of the error. Successful PO Changes will be reviewed and dispatched appropriately by Logistics Acquisition.

How does the Requester track the status of their PO Change Requests?

- The Requester can monitor the status of their PO Change Requests from Manage Requisitions > Inquire PO Change Requests hyperlink. This page will display the buyer, date/time reviewed, status, and any processing error message. Additionally, if one of the ePro Approvers "denies" the PO Change Request, an automated Worklist Notification will appear on the Requester's worklist (same a requisition denial).

How does the Requester know if the ACQ buyer "denies" their PO Change Request?

- The ACQ Buyer is responsible for e-mailing the Requester when they deny a PO Change Request
- Additionally, the Requester can monitor the status of their PO Change Requests. From the Manage Requisitions page > Inquire PO Change Requests hyperlink, they can see if the buyer has reviewed the request and "denied" it. This page will be updated with the buyer ID

and the date/time the buyer reviewed the request. The Change Request Approved box will <u>not</u> be checked. The requestor can then drill down to the request details to see the status as "Deny" and any comments the buyer added explaining the denial.

How does the Requester know if their Approved PO Change Request did not qualify for a PO Change, thereby causing a processing error (i.e., quantity is decreased below the quantity received)?

- The Purchasing Help Desk will monitor the PO Change Request process to identify any "errors".
- The Purchasing Help Desk will notify the Requester of any PO Change Requests that error out during the automated process.
- Additionally, the Requester can monitor the status of their PO Change Requests. The Requester can review the PO Change Request details from their Manage Requisitions page. If this page has been updated with the buyer ID, the date/time approved, and the Change Request Approved box is checked, the Requester can drill down to the request details to view why the PO Change did not qualify for processing. The Process Status will appear as "Error". Clicking the View Processing Messages will display the reason for the error (i.e., cannot change a schedule quantity to be less than the received quantity for that schedule; Price Change flag on PO line indicates that the price cannot be changed on this PO, yet a price change is requested.)