Change Orders

Use this guide to initiate a change order for Academic or Miller School of Medicine.

http://workday.miami.edu

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Before Changing a Purchase Order

1. **Allowed Changes** - Orders for additional goods should be placed as a new requisition. Common examples of acceptable change orders:
   - Catering changes for a single event or a pre-authorized standing order
   - Extending the end date of a service contract
   - Additional and unexpected maintenance needed on bi-annual equipment maintenance.

2. **Access** – Change orders do not need to be initiated by the requisition creator. Only employees with the Workday security role Department Procurement Data Entry Specialist can initiate a change order. To view the list of users with access:
   a. Scroll down to the Goods/Services Lines and click the Cost Center number.
   b. Click the Roles tab
   c. Scroll down to the Department Procurement Data Entry Specialist role. The employees listed have access to close this purchase order.

*TIP:* To request the Department Procurement Data Entry Specialist security role, email Help@miami.edu.

3. **Invoiced Items** – If an item has already been invoiced and the worktag needs to be changed, process a journal entry. Contact Help@miami.edu for assistance.

4. **Cancelled Items** - If a line item was cancelled by either the department or the supplier, an amount may appear, but the PO can still be closed.
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5. **Expired Grants** – If a PO contains an expired grant, for technical reasons it cannot be edited. Instead create a new requisition for the estimated amount of pending invoices and future invoices. Note in the Comments, “This PO replaces PO#...”.

6. **Cancel a Change Orders In Progress** – To cancel a change order that is currently In Progress, email the request to Ignacio Calle and Ken Pallais.

### Changing a Purchase Order

1. Log into Workday. https://workday.miami.edu

2. **Search** for the purchase order.

   **TIP:** If the purchase order does not appear, configure your search box results to include Procurement.

3. Check the **Status** of the purchase order.
   - **Cancelled** – The PO cannot be changed. Instead, Create a new PO for the remaining invoices.
   - **Change Order In Progress** – Before another change order can be initiated, it will need to be fully approved or the change order will need to be cancelled by Ignacio Calle and Ken Pallais.

4. Initiate the change order:
   a. Click the Related Actions button. (three dots)
   b. Hover over Purchase Order.
   c. Click Create Change Order.

5. Adjust the fields depending on the needed changes.
   a. **Comments and Memo** - Since there are over 30 fields, tell the approver which fields are being updated and why. Examples:
      - Increasing dollar amount for additional attendees.
      - Extending end date to September 31, 2022.
   b. **Dollar Amount** - Type the total PO amount in the Ordered field.
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For example:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past invoices</td>
<td>$334.53</td>
</tr>
<tr>
<td>+ Future invoices</td>
<td>$265.47</td>
</tr>
<tr>
<td>= &quot;Ordered&quot;</td>
<td>$600.00</td>
</tr>
</tbody>
</table>

6. To begin the approval process, click Submit.

Checking the Status of a Change Order

7. Log into Workday.

8. Search for the purchase order.

9. TIP: If the purchase order does not appear, configure your search box results to include Procurement.

10. If the status is Change Order In Progress, approvals are still pending.

The Process History view for the PO and Change Order are located on two separate screens. To view the change order approvals, scroll down and click the Version History tab. Pending Changes appear on the lower right side. After clicking the magnifying glass, the change order view now approves.
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To view the approvers, click the Process History tab. A current approver will have a status of "Awaiting Action."

<table>
<thead>
<tr>
<th>Process</th>
<th>Step</th>
<th>Status</th>
<th>Completed On</th>
<th>Person (Up to 5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Order</td>
<td>Review Change Order</td>
<td>Awaiting Action</td>
<td>09/29/2022</td>
<td>Jean</td>
</tr>
</tbody>
</table>

Supplier Communication

Once completely approved, change orders are not automatically sent to the supplier. Therefore, communicate any changes. Should the supplier need a copy of the change order, please reach out to PurchasingAcademic-ResearchHelpDesk@miami.edu for assistance.

For assistance, contact the PurchasingHelpDesk@miami.edu