

# Purchase Order "Change Orders"

Updated Apr 14, 2021

## Overview

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A **Change Order** may be used to modify any **Purchase Order** that has been sent to a Vendor, including contract amendments.

## Change Order Security

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In Veracross, a Change Order is necessary after the Purchase Order has been "locked" or "posted".

Currently, only users with **Sys\_Admin** and **Accounting\_PO** may modify a Purchase Order after it has been locked.

Depending on the school's System Parameters, a user with **Accounting\_PO\_Public** may be able to modify the Requisition after it has been "Completed" and not yet Approved or Posted.

After a Purchase Order has been locked and a Change Order is necessary, the Requester or Approver should contact the Business Office with the changes needed. The Business Office will be able to add an additional positive or negative line item to the locked Purchase Order.

## Change Order Workflow - for the Business Office

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1. In the Accounting Database, navigate to the **Purchase Order Homepage**.
2. Using the **Purchase Order Header Listing** or the **Open Purchase Order Report**, open the Purchase Order that requires a change order.
3. Within the Purchase Order, click the "Add a Record" button to add a new PO Item. Fill in the appropriate Quantity and Unit Price for the new PO Item. This could be a positive or negative amount, depending on whether the PO Amount needs to be increased or decreased.
4. When "Update" is clicked, the PO Amount will be adjusted.
5. Navigate the the Action Menu and select "Post PO" to post/lock the Change Order.
6. Once the PO is posted, the Open Commitment will be adjusted as well.

If flagging a PO as "received" is required for the school, the "Change Order" PO Item should be flagged as "Fully Received", so it will be eligible to be paid along with the original PO Item it was adjusting.