OMES Central Purchasing (CP)



TIPS ON PROCESSING CHANGE ORDERS

Is a requisition required to process the change order per the Direct PO PIM?



Agency will process the change order directly on the PO.

Has CP approved the PO in the past?



Agency can process the change order to PO, leave the origin as is and the PO will route to CP for review.

For more information on proper coding, see the **PO Type and Origin** chart.

YES - If the purchase normally requires a requisition, then a requisition is required to process the change order.

NO – If a purchase can be done by direct PO, then a change order doesn't require a requisition and can just be processed on the PO by the agency.

CP = OMES CENTRAL PURCHASING

Agency will create a requisition, then select the **Change Order** option from the drop-down menu.

Approval routing will stay at agency level and bypass CP. IT requisitions will route to CIO for approval

Once approved, agency will pull the requisition into the existing PO and process the change order.

Agency will process the change order to the PO, update the PO origin to CHG and update to agency buyer if needed per the ePro Required Requisitions PIM.

NOTE: When you update the buyer ID, a message pops up that begins with: "Changing Buyer will change the default values..." Select **CANCEL** on this message.

Approval routing will stay at agency level and bypass CP. IT requisitions will route to CIO for approval.

For more information on how to process change orders, see the following Procurement Information Memorandums issued by the state purchasing director.

- 1. PeopleSoft ePro Requisition Required Attachments.
- 2. Direct Purchase Orders.

ADDITIONAL TIPS:

- 1. You cannot change the vendor on a purchase order. You must cancel the existing purchase order and initiate a new purchase order with the updated vendor information. Be sure to note the previous PO if it would normally require a requisition, so it leaves the approval trail.
- 2. You cannot decrease the quantity of a line below the received or invoiced quantity.