Unified Procurement Services Team

Change Order Standards & Scenario Process Maps

July 2021

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Change Order Process: Standards

✓ Changes to an active PO **MUST** be initiated before the supplier performs the service/fulfills the order

✓ Change request should impact **ONLY** future invoices, not existing ones

✓ **For Unfulfilled Items**: note in the PO comments items that will not be fulfilled. Once remaining items have been paid, please process a CLOSE REQUEST

✓ Do **NOT** submit a change request prior to supporting documentation finalization

✓ Change requests are **subject to UPST review** and any issues or incomplete documentation will be returned. UPST reserves the right to return any changes that may result in system processing failures

✓ For questions **regarding Budgets**, please contact your Campus Budget Office

✓ Blanket Orders cannot have any lines with a quantity greater than one (1)

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Change Order Process Update: Exceptions

Instances where a change request **may not be created** on an existing PO:

- Catalog or punchout orders

- POs without sufficient budgeted funds to cover the change request

- Split funded line items

- Existing invoices against a current PO line item

- Addition of new line items to a closed or closing PO

- When a decrease in quantity/amount in change request will close out a PO

- When change is to the shipping cost line item

- Goods POs with change request amounts **within 10% /$250** of the current PO price

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Change Order Process Update: Before Request

## GENERAL CONSIDERATIONS BEFORE INITIATING A REQUEST
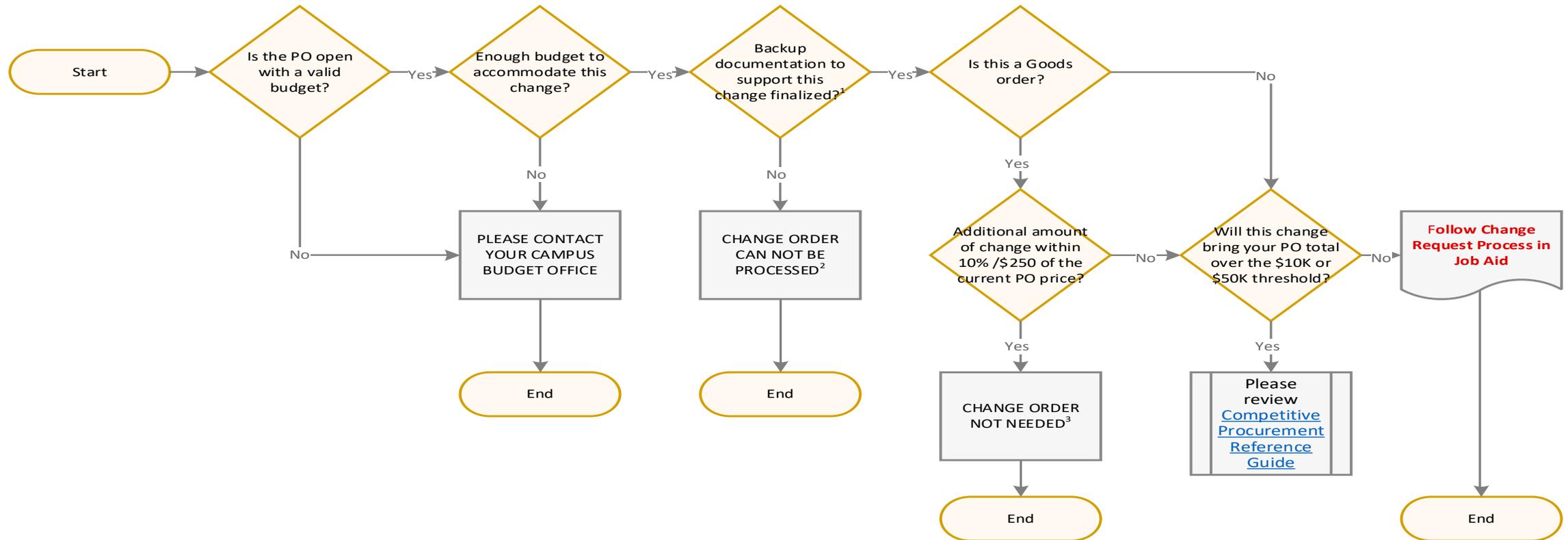
NOTE:
1. Back up documentation can include: Fully executed contract/amendment added/updated in BuyWays, Quotes, OR NBJ
2. Please **DO NOT** submit a change request prior to supporting documentation being finalized
3. Change request not needed as the invoice will process the additional amount

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Change Order Process Update: Scenario #1

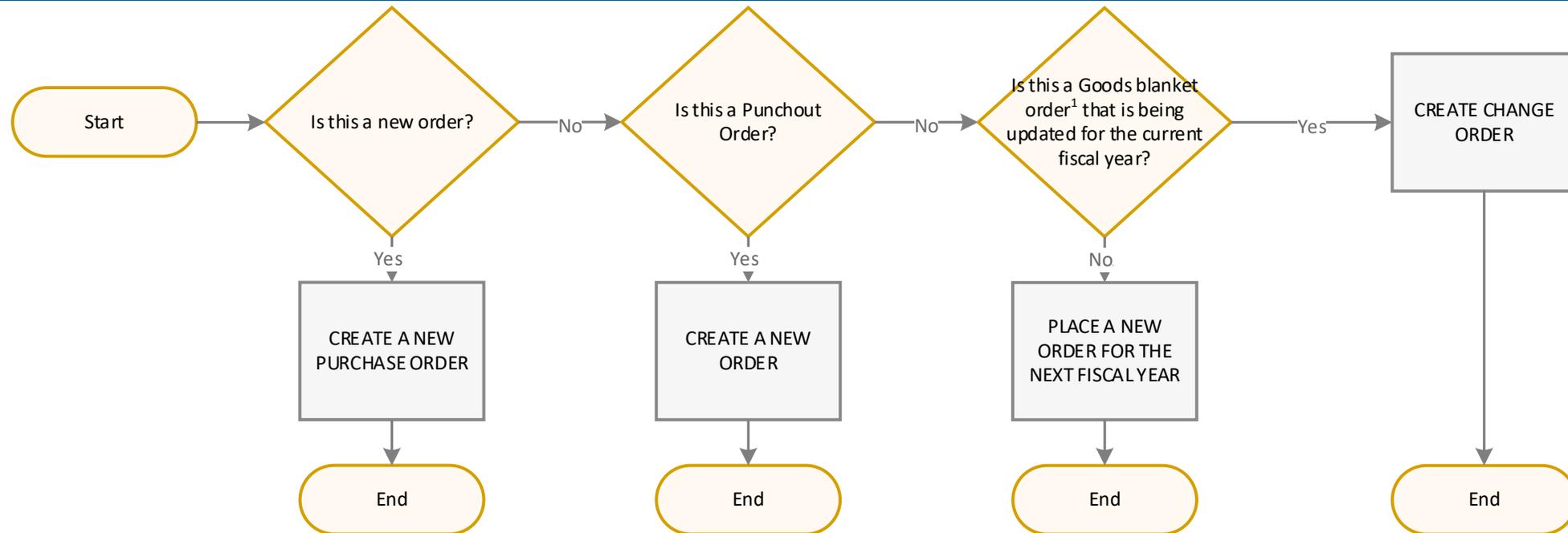## UPDATE SPEEDTYPE/ACCOUNT CODE
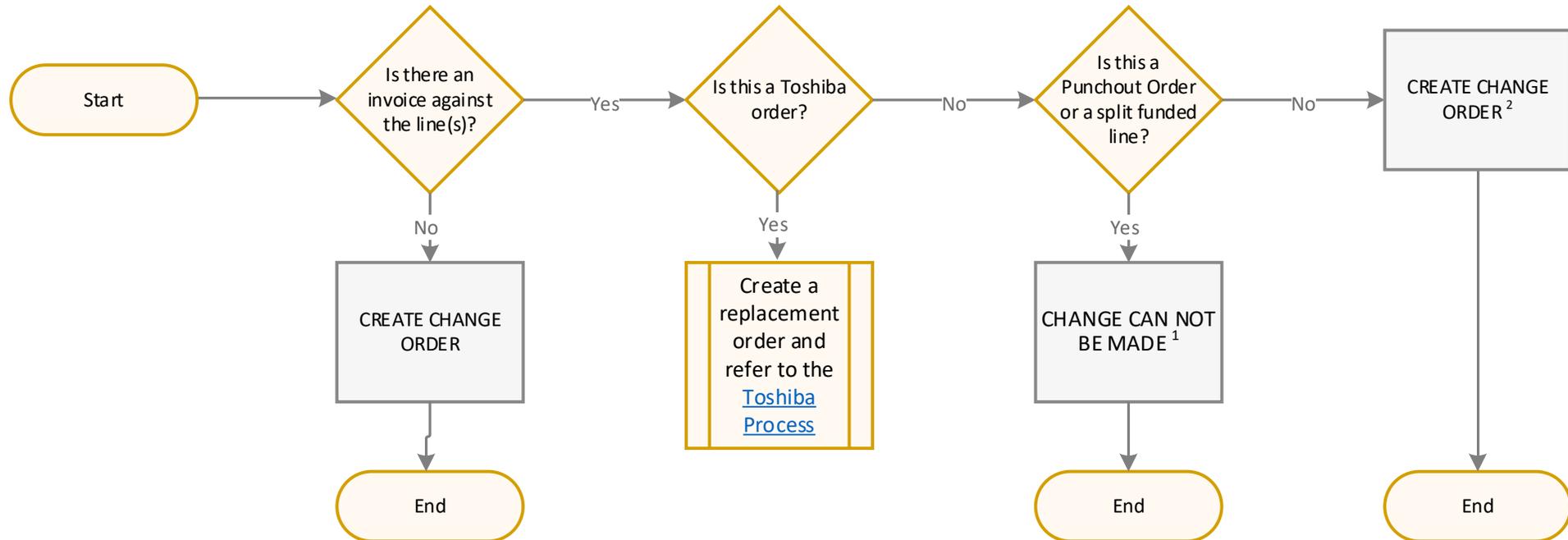
NOTE:
1. Update can be made by creating a journal entry
2. Request to add a new line with the new SpeedType and/or account code and reduce the currently existing line to the vouchered amount

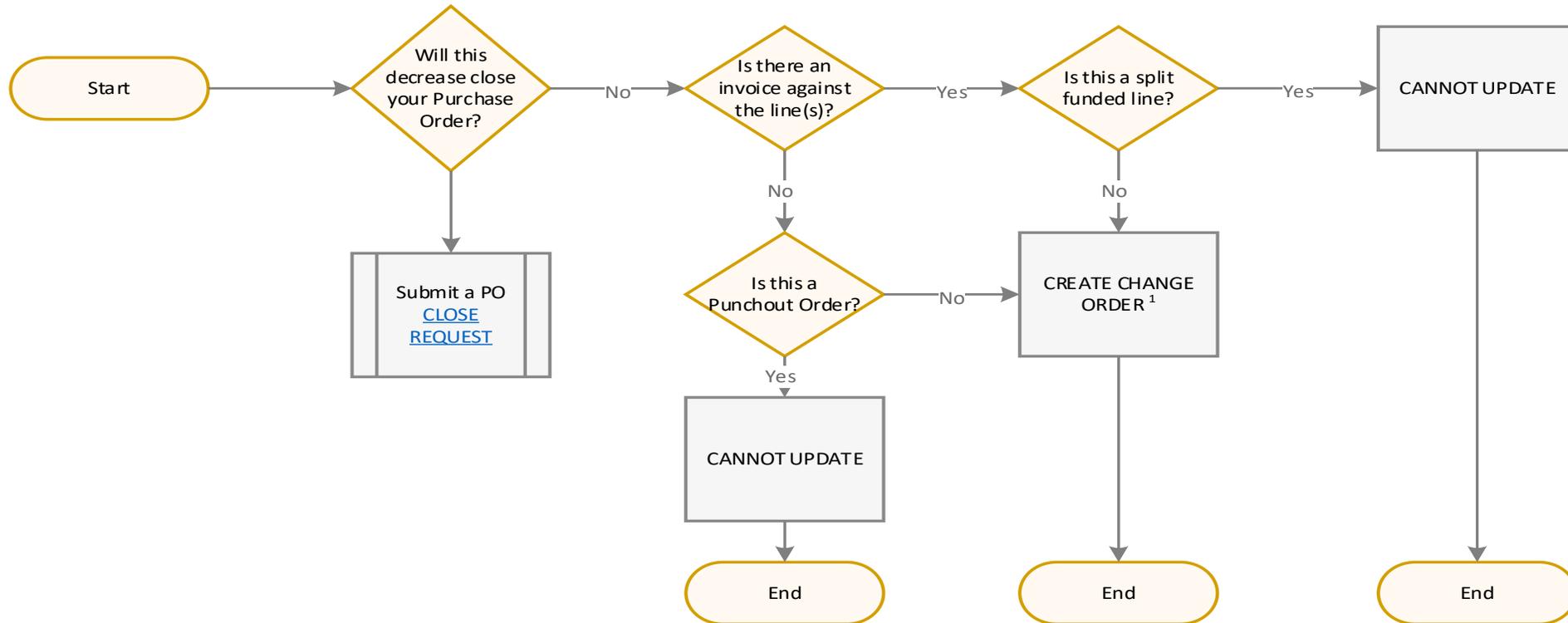# Change Order Process Update: Scenario #2

INCREASE AMOUNT/QUANTITY

Start → Is this a new order?
- Yes → CREATE A NEW PURCHASE ORDER → End
- No → Is this a Punchout Order?
  - Yes → CREATE A NEW ORDER → End
  - No → Is this a Goods blanket order[1] that is being updated for the current fiscal year?
    - No → PLACE A NEW ORDER FOR THE NEXT FISCAL YEAR → End
    - Yes → CREATE CHANGE ORDER → End

NOTE:
1. Blanket PO's are used for service related purchases or contracts for services, where multiple invoices are expected against the PO

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Change Order Process Update: Scenario #3
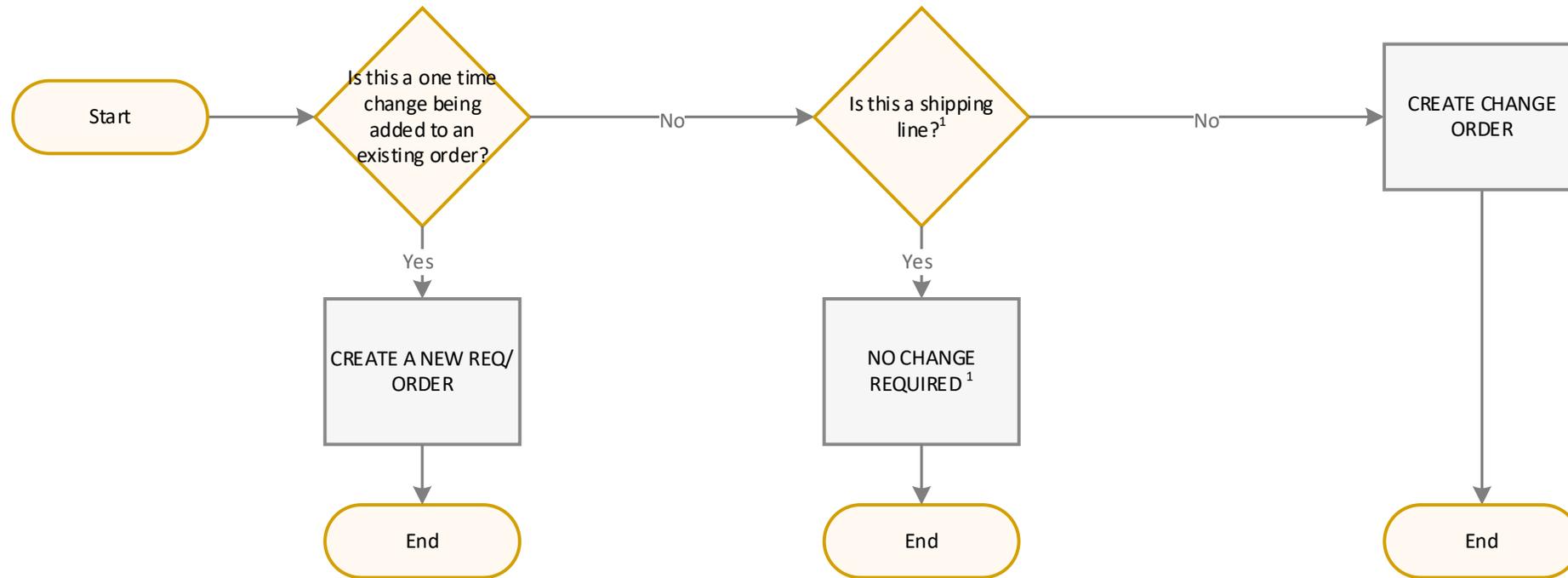
DECREASE AMOUNT/QUANTITY

NOTE:
1. Cannot decrease below the already vouchered amount

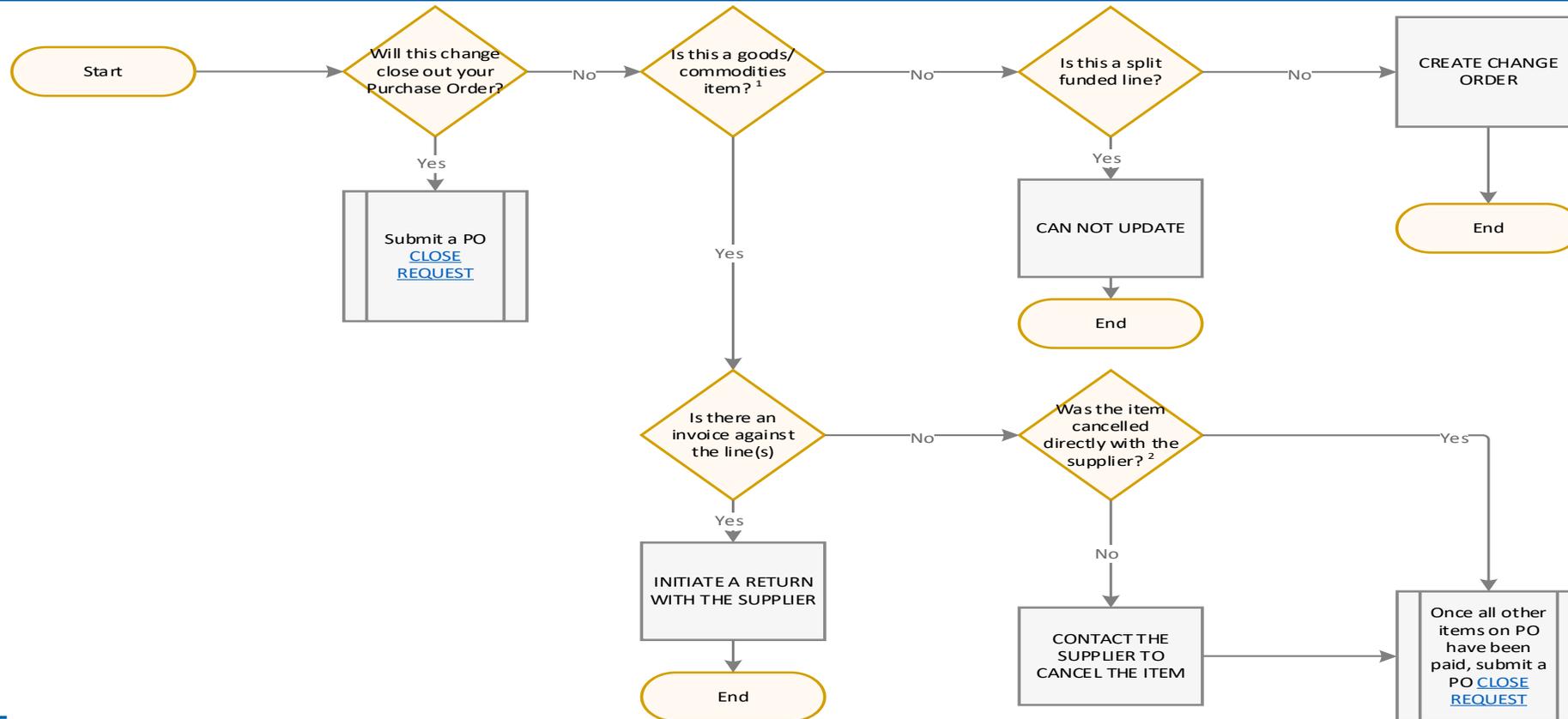# Change Order Process Update: Scenario #4

ADDING NEW LINES

NOTE:
1. Shipping charges (unless in the thousands) are paid at the header level during invoicing, meaning no change order is needed

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Change Order Process Update: Scenario #5

CANCEL/CLOSING LINES

NOTE:
1. Commodity codes indicate what type of purchase you are making and it will drive other functions in workflow, i.e. if special approval is required or if the items require receiving, etc
2. Each supplier has their own process for returns. Please contact the supplier directly for instructions

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upst@umassp.edu