1. **PO Change / Cancel Process**

- Changes can be made to an existing Open non-catalog PO.
- Changes are usually processed in Banner within 24 to 48 hours from submission.
- You will receive an email notification once the change is complete.
- **Punchout order changes cannot be communicated to the supplier.** Please contact them directly to request a change or line item cancellation.
- You will not be able to make a change on a *fully invoiced PO* using this process. Please contact Procurement Services if you have an order that is *fully invoiced* in Jaggaer, however, still open in Banner.

2. **Do not submit a change request if:**

- Your change is less than 5% of the total value of the PO or $50 per line item. Instead, add a comment to the PO indicating your approval for payment.
- You are decreasing the value of the PO. The PO will be paid and any remaining funds will be released.
- You are adding freight or shipping charges that are under $500. The freight or shipping charges will be paid.
- You are changing the FOAPAL on *more than 3 line items.* Instead, complete a journal voucher to transfer the funds.
- You are requesting to remove an encumbrance. Instead, email acctpay@nd.edu and ask them to release the balance.

3. **Open existing PO**

- Select Create Change Request under the ellipsis “…” on the upper-right hand of the screen next to the “results” drop down.

4. **Change Request Dialog box**

- The change request will automatically go to your financial approvers. You don’t need to select anyone’s name from the list.
- You have the option to add more email recipients.

**Create Change Request**

This will create a change request for this purchase order. If you select a user, they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s):  
- Diana Kennedy (Approved Requisition) <kennedy.75@nd.edu>
- [add email recipient]...
PO Change/Cancel Requests

5. Add the PO Change details

- Click Create Change Request button
- Click the pencil in the top right corner of the change request reason field
- Add the change information in the comment box. Please describe the change in detail.

6. Change the Existing Line Details

- The system will open a change request form so you can make your edits.
- Click the line item description to change the line Description, Catalog #, Unit Price or Quantity

7. Line Item Details

- The fields become available for any changes needed.

<table>
<thead>
<tr>
<th>Item</th>
<th>Catalog No.</th>
<th>Product Description</th>
<th>Quantity</th>
<th>Unit Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>n/a</td>
<td>Floral Arrangements</td>
<td>3</td>
<td>25.00</td>
<td></td>
</tr>
</tbody>
</table>

8. FOAPAL Change

- Under the Codes FOAPAL section of the PO, select the Pencil in the upper right of that section to edit the FOAPAL fields.
PO Change/Cancel Requests

   - You can change the existing FOAPAL or add additional FOAPAL's.
   - To add additional FOAPAL lines (split), click the “+” at the end.

10. Add a line(s) to the PO
    - If you need to add any lines to the PO, click the ellipses (3 dots) above the first line item and choose Add Non-Catalog Item.

11. Add line details
    - A non-catalog form will open
    - Add the line item details in the form
    - Click save or save and add another line item

12. Changes complete
    - After all changes are complete, you will click Submit Request in the upper right of the change request form.

For assistance, call Procurement Service Help Desk at 631-4289 or email at buy@nd.edu
13. **PO Change Workflow**
- The PO Change will process through the appropriate workflow based on the changes you made.
- Approvers will be notified to approve the change request.
- Procurement Services will be notified of the change request and make the appropriate changes in Banner.

14. **Cancel the PO**
- The process to Cancel a PO follow steps 3-7.
- In step 5, the comment box of the PO Change Request, enter “Cancel PO”.
- In the line item details section, check the box at the end of the line items.
- Scroll up to the check box above the items (just above the name of the vendor) and click the blue arrow to open more options.
- Click **Cancel Selected Items**.
- Click **Submit Request** button.