

# 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:
  - o Catering changes for a single event or a pre-authorized standing order
  - o Extending the end date of a service contract
  - o 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.

#### Service Lines

2 items

Program	Gift	Project	*Cost Center
PG002578 Purchasing			CC00

- b. Click the *Roles* tab

Members   Details   **Roles**   Security Groups

- c. Scroll down to the *Department Procurement Data Entry Specialist* role. The employees listed have access to close this purchase order.

Assignable Role	Assigned To
Department Procurement Data Entry Specialist	Manuel
	Diego

**TIP:** To request the *Department Procurement Data Entry Specialist* security role, email [Help@miami.edu](mailto: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](mailto: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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- 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#...”.
- 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](#).

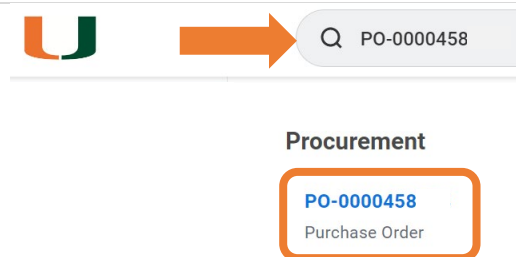
## Changing a Purchase Order

1. Log into Workday.

<https://workday.miami.edu>

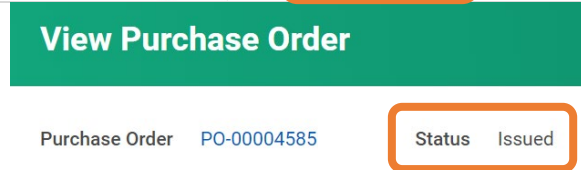
2. [Search](#) for the purchase order.

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

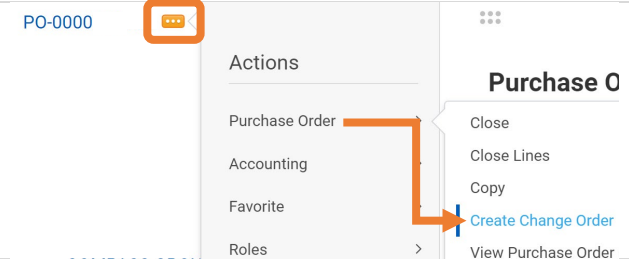


3. Check the *Status* of the purchase order.

- *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:
- Click the Related Actions button. (three dots)
  - Hover over **Purchase Order**.
  - Click **Create Change Order**.



5. Adjust the fields depending on the needed changes.

- 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.
- Dollar Amount - Type the total PO amount in the *Ordered* field.

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<p>For example:</p> <p>past invoices      \$334.53 <i>Invoiced</i>          + future invoices + \$265.47 estimated          = "Ordered"      = \$600</p>	<table border="1"> <thead> <tr> <th colspan="2">Amount</th> </tr> </thead> <tbody> <tr> <td>Ordered</td> <td>600.00</td> </tr> <tr> <td>Received</td> <td>0.00</td> </tr> <tr> <td>Invoiced</td> <td>334.53</td> </tr> </tbody> </table>	Amount		Ordered	600.00	Received	0.00	Invoiced	334.53
Amount									
Ordered	600.00								
Received	0.00								
Invoiced	334.53								

6. To begin the approval process, click **Submit**.

## Checking the Status of a Change Order

7. Log into Workday.

<https://workday.miami.edu>

8. [Search](#) for the purchase order.



9. **TIP:** If the purchase order does not appear, configure your [search box results](#) to include *Procurement*.

Procurement

**PO-0000458**  
Purchase Order

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

Purchase Order [PO-0000](#)

Status **Change Order In Progress**

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.

Service Lines **Version History** Process History Attachments Printing Runs Balances

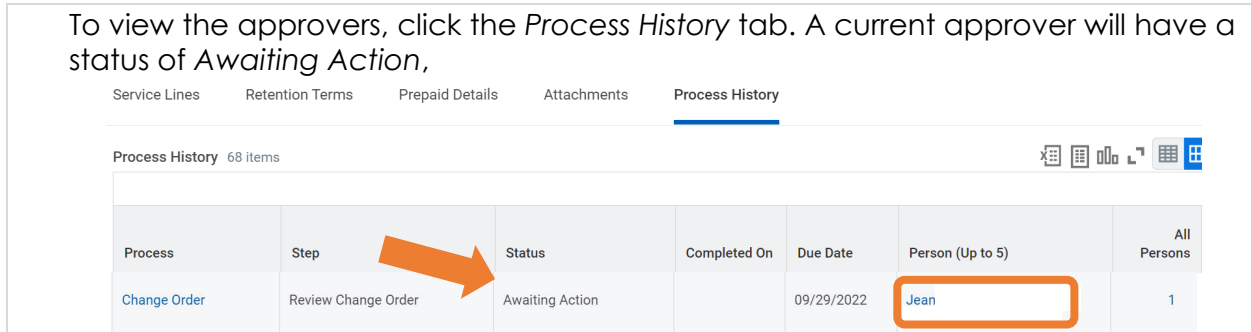
Prior Versions 0 items Pending Changes 1 item

Purchase Order	Change Date	Total Amount	Change Order	Version	Created On	Change Order Status	Total Amount
No items available.				1	09/07/2022	In Progress	2,577.49

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To view the approvers, click the *Process History* tab. A current approver will have a status of *Awaiting Action*,



The screenshot shows the 'Process History' tab selected in the Workday interface. The table below displays the process history for a 'Change Order'.

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons
Change Order	Review Change Order	Awaiting Action		09/29/2022	Jean	1

## 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](mailto:PurchasingAcademic-ResearchHelpDesk@miami.edu) for assistance.

For assistance, contact the [PurchasingHelpDesk@miami.edu](mailto:PurchasingHelpDesk@miami.edu)