How to Request a Change Order: $100,000 or greater

*** Since the new TOTAL value of the PO is over $100,000 you will need to complete a Purchase Order Change Request Form <u>and</u> a Sole Source Form**

1. Complete the **Sole Source** form and get it signed.

   The Rationale section of the form should address why this supplier is the only one that can satisfy the requirements, and also why the additional funds are required.

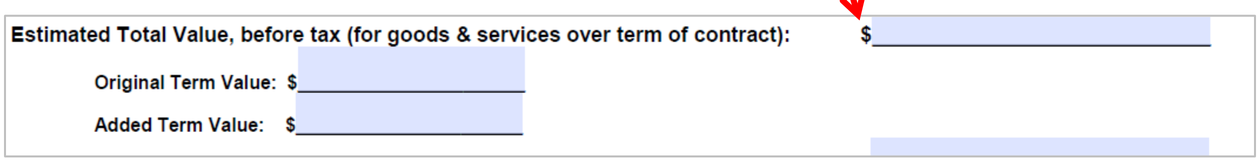
   On the Sole Source form:

   Estimated Total Value= new total of PO (new + old funds)

   Original Term Value = original funds on PO

   Added Term Value= new funds adding to PO

   Remember, the above values are always pre-tax (the system calculates the tax).

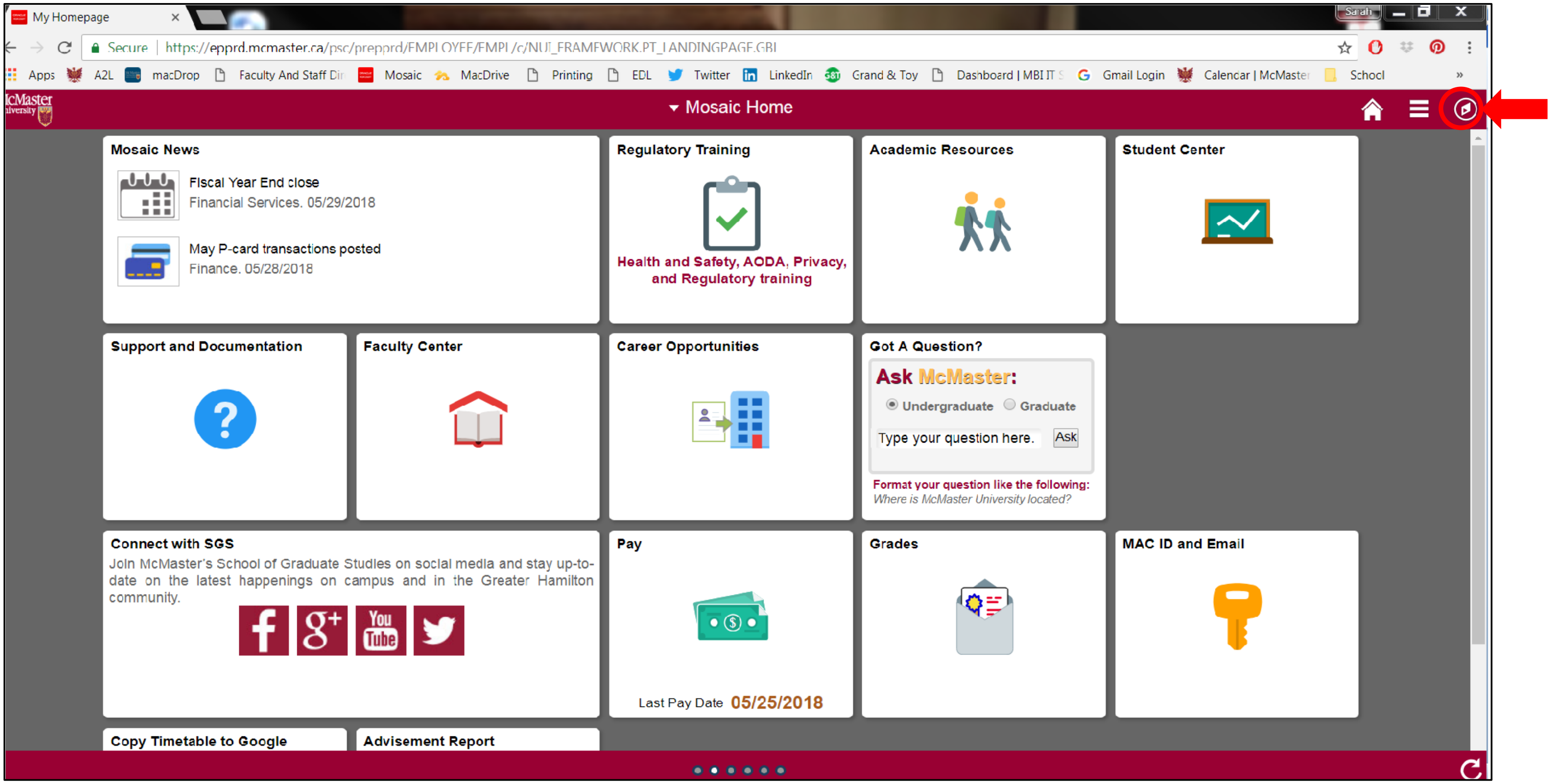


Estimated Total Value, before tax (for goods & services over term of contract): $________________

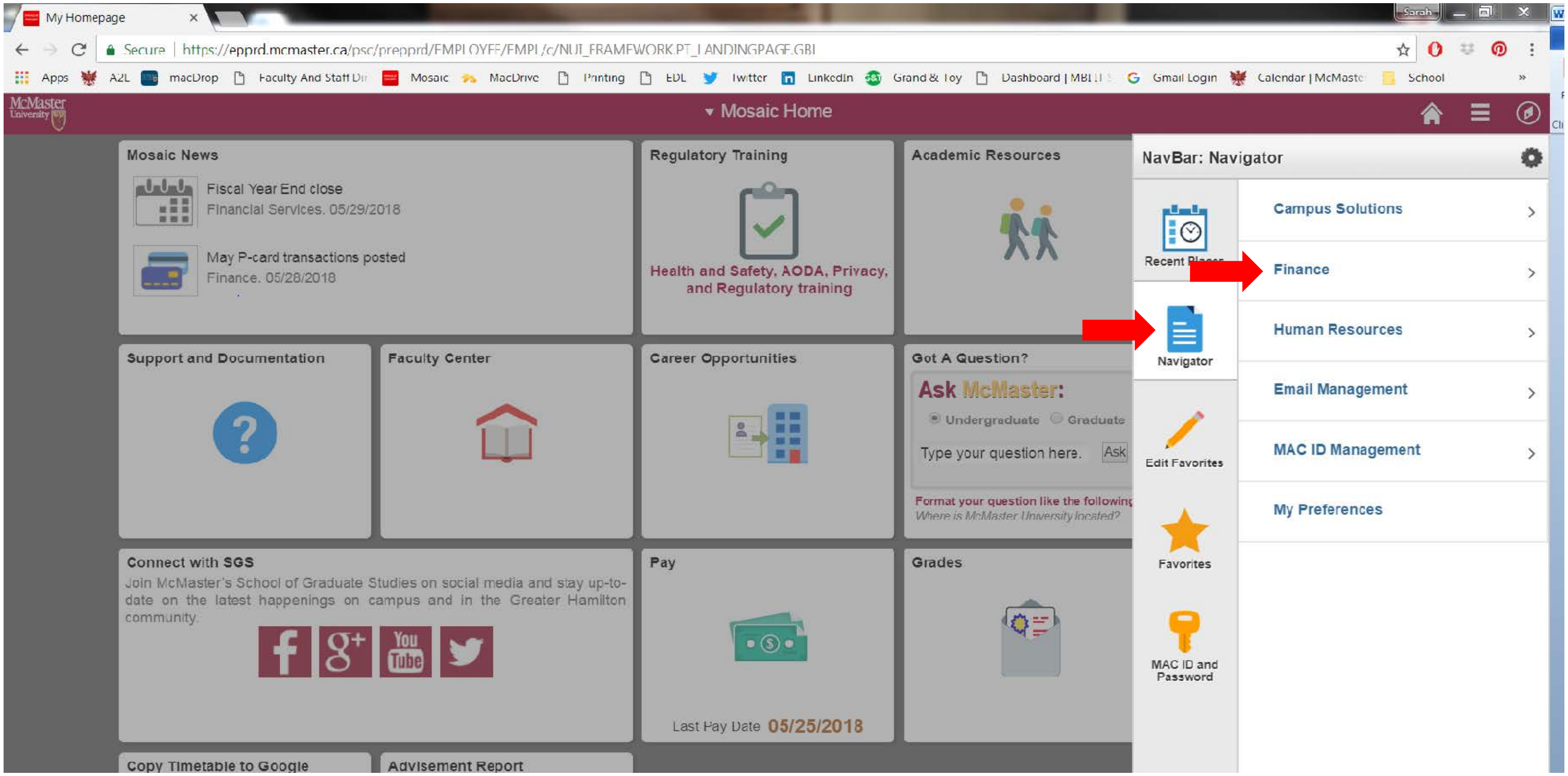
Original Term Value: $________________

Added Term Value: $________________

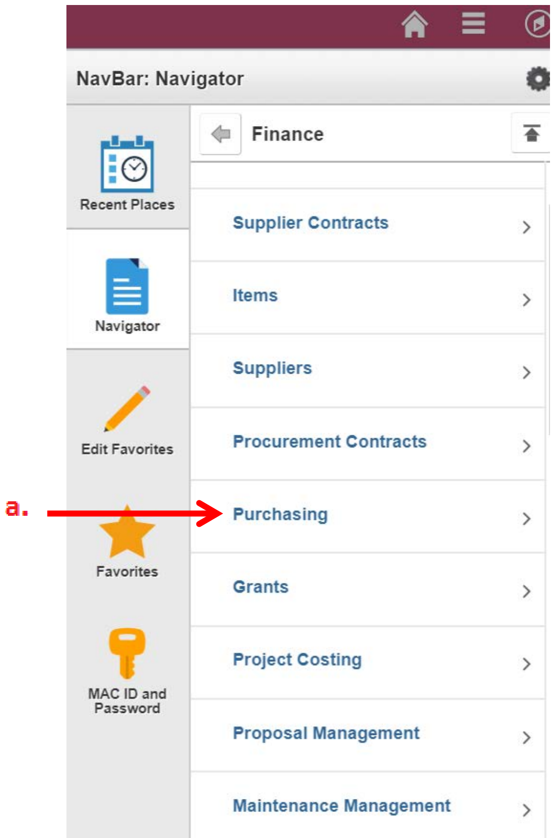
2. Login to MOSAIC
3. Select the NavBar Icon at the top of the screen

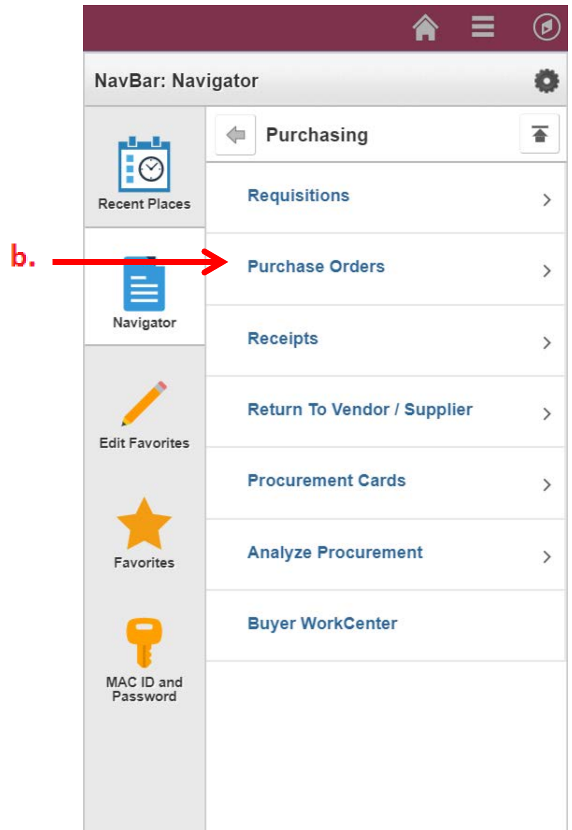


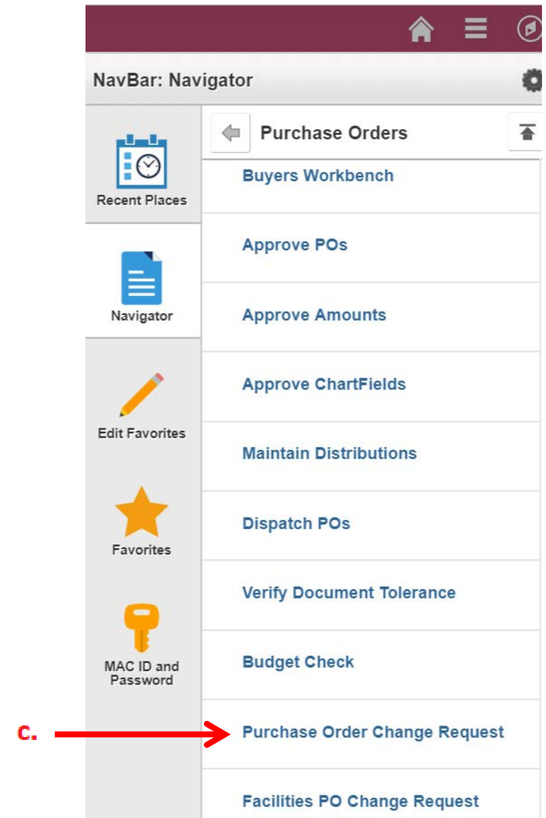
4. Select '**Navigator**', then '**Finance**'



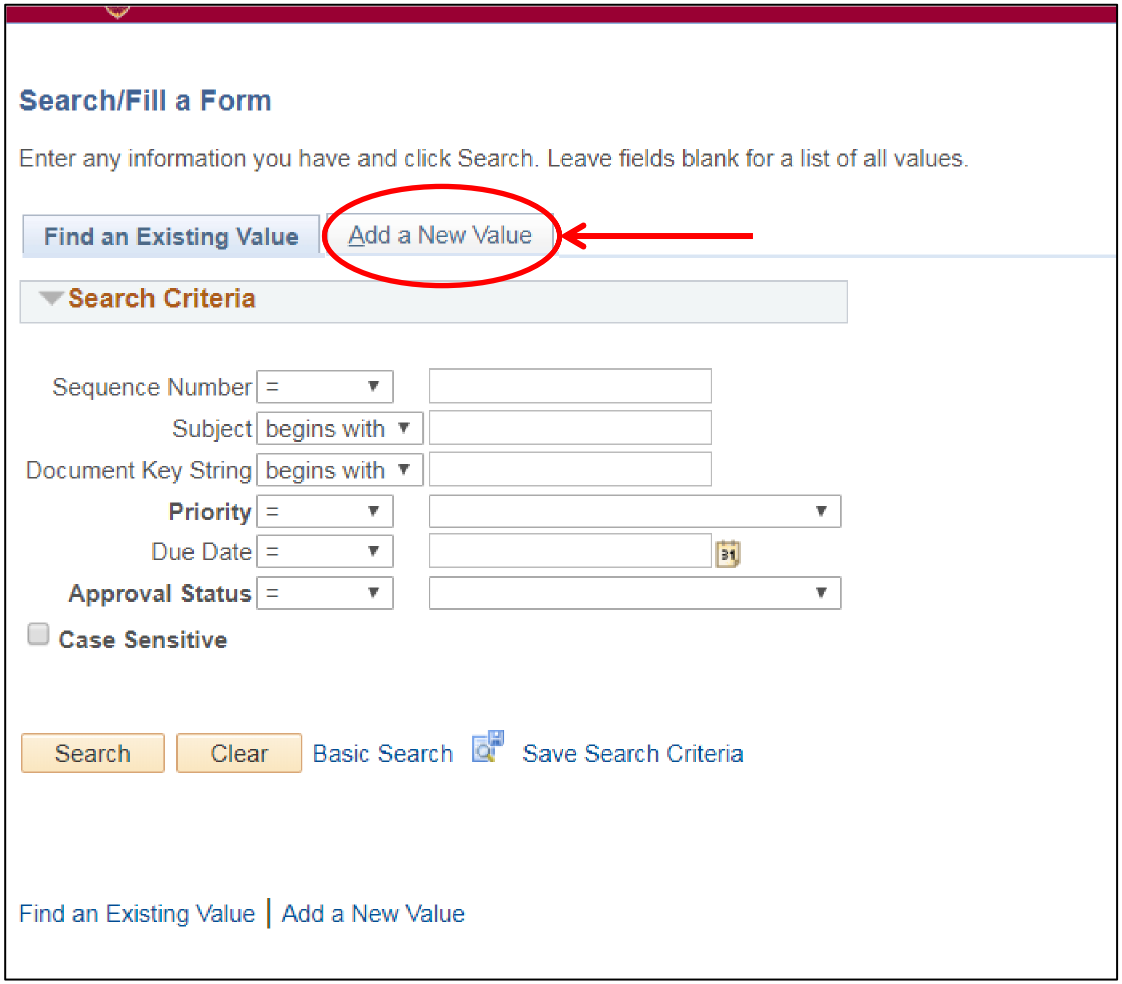
5. Start a Change Request, by selecting:
   a. Purchasing
   b. Purchase Order
   c. Purchase Order Change Request (bottom)



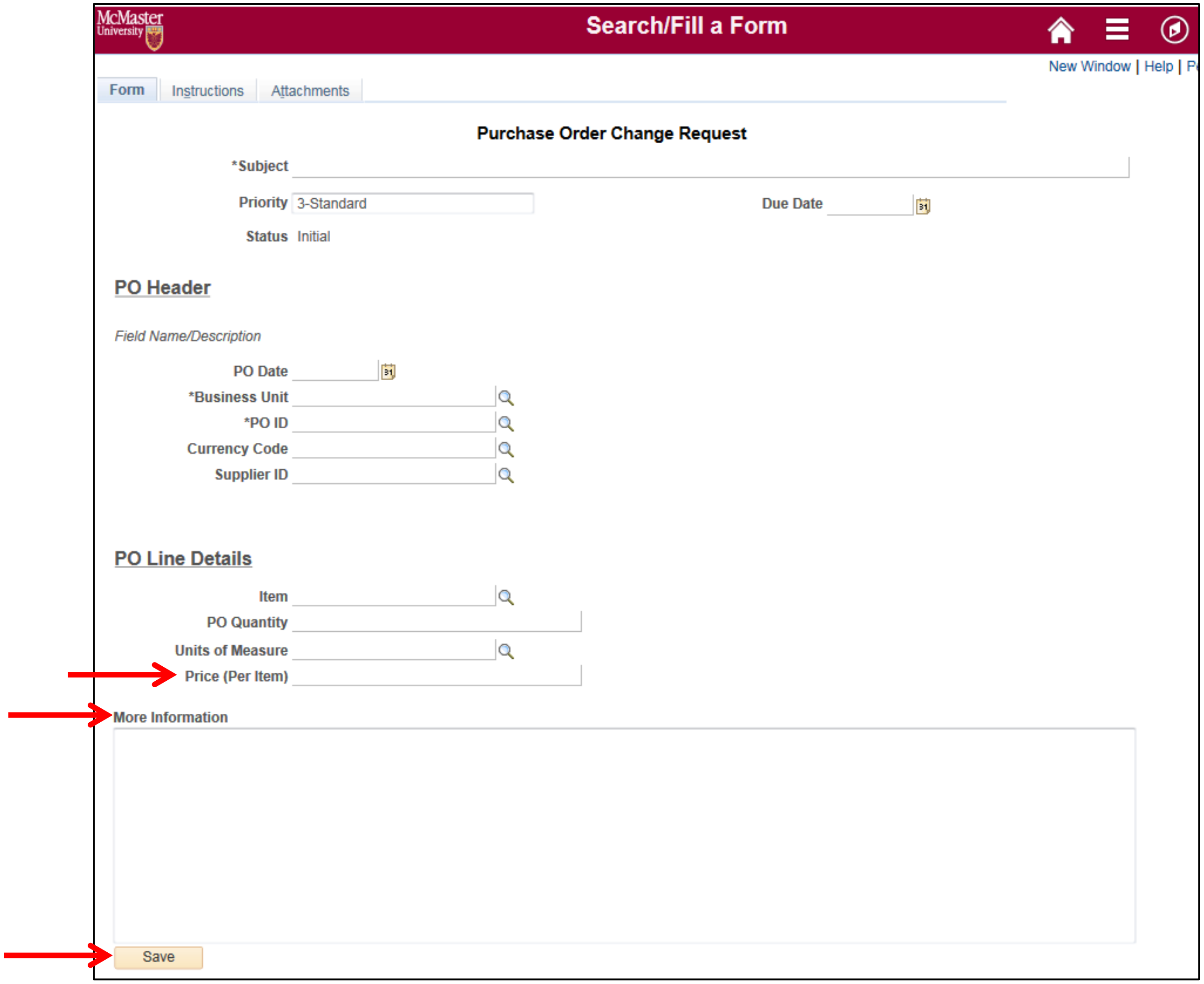




6. Select **'Add a New Value'**
   This will bring you to the Change Request form.



7. Complete the Purchase Order Change Request form.
8. Hit **'Save'** at bottom



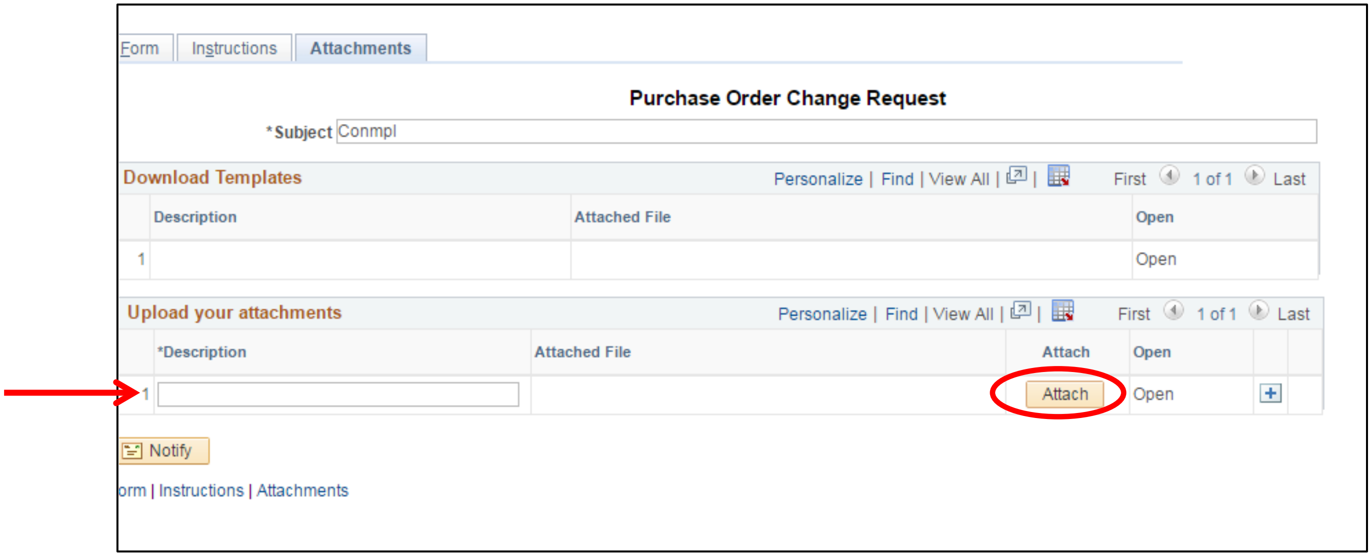
Under PO Line Details, the Price (Per Item) list the doller value you are requesting to have added to the purchase order.

If you know the current value of the PO it is helpful to provide the following information in the More Information section of the form:

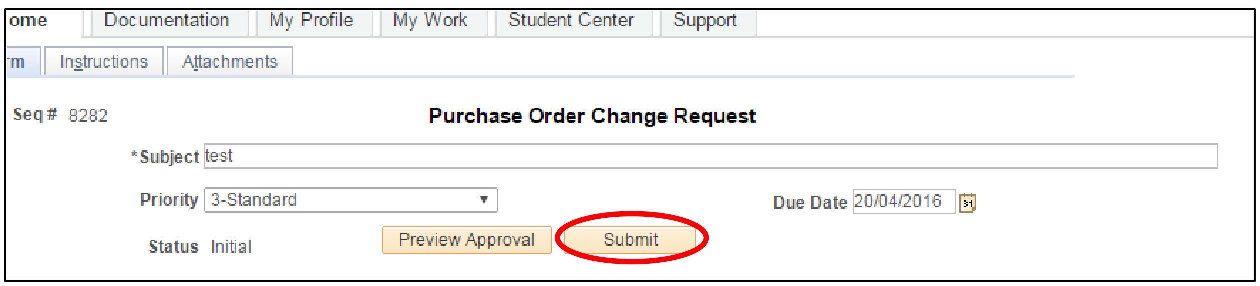
Original Term Value (original funds on PO)
\+ Added Term Value (new funds adding to PO)
= Estimated Total Value (new total of PO: new + old funds)

Remember, the above values are always pre-tax (the system calculates the tax).

9. Go to the 3rd tab called ‘**Attachments**’ to attach the **Sole Source Form.**
   Also attach any backup you have to support the addtiion of funds (i.e. quote, pricing, contract).



10. Go back to the Form tab and hit **‘Submit’** at the top of the form.



Your form will now go into Procurement workflow for review and approval. Procurement will approve the form, revise the purchase order and let you know when the funds have been added to the purchase order.