

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

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\* Since the new TOTAL value of the PO is over \$100,000 you will need to complete a Purchase Order Change Request Form and 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.**

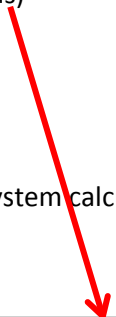
On the Sole Source form:

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

Original Term Value = original funds on PO

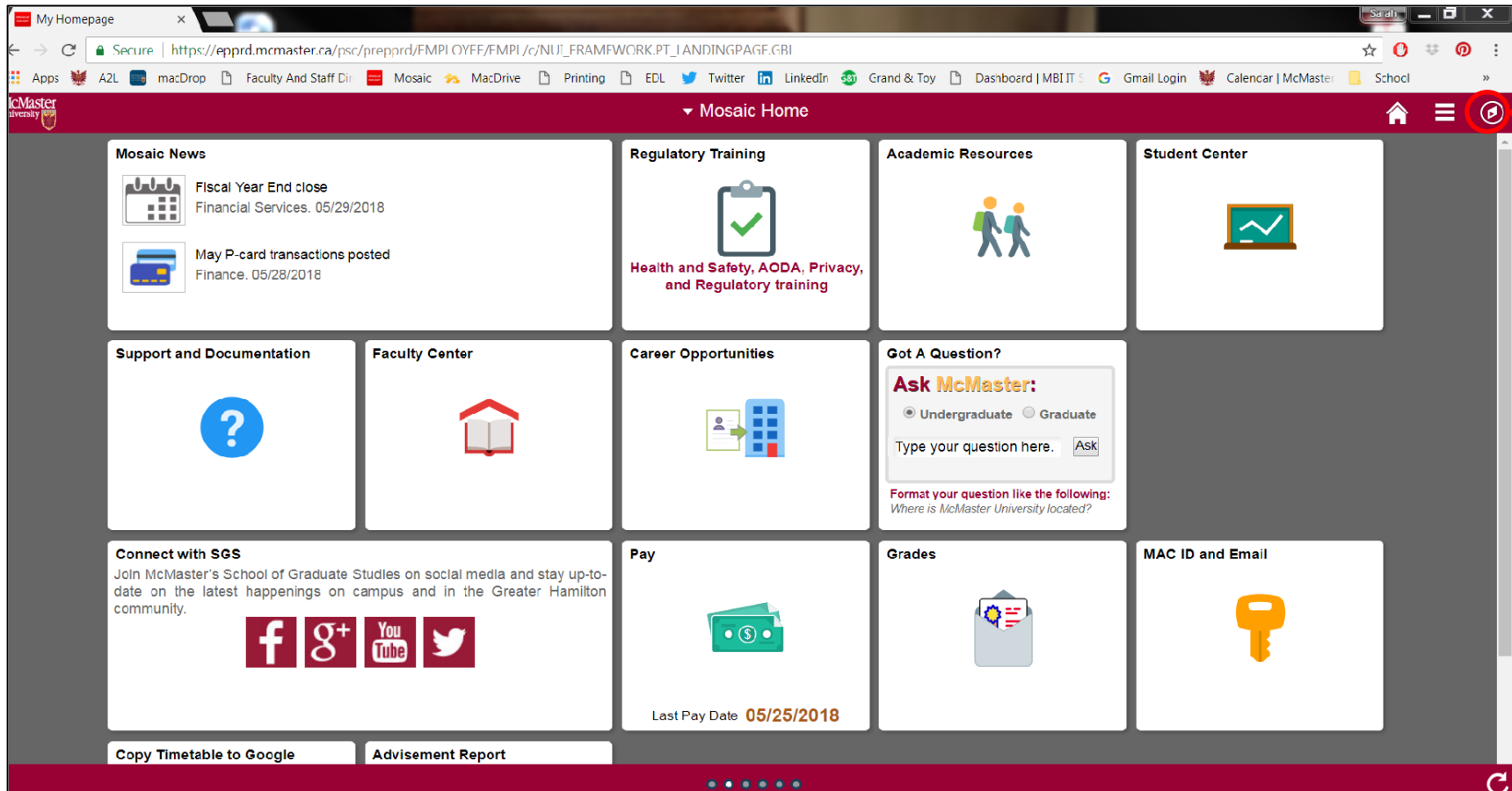
Added Term Value= new funds adding to PO

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

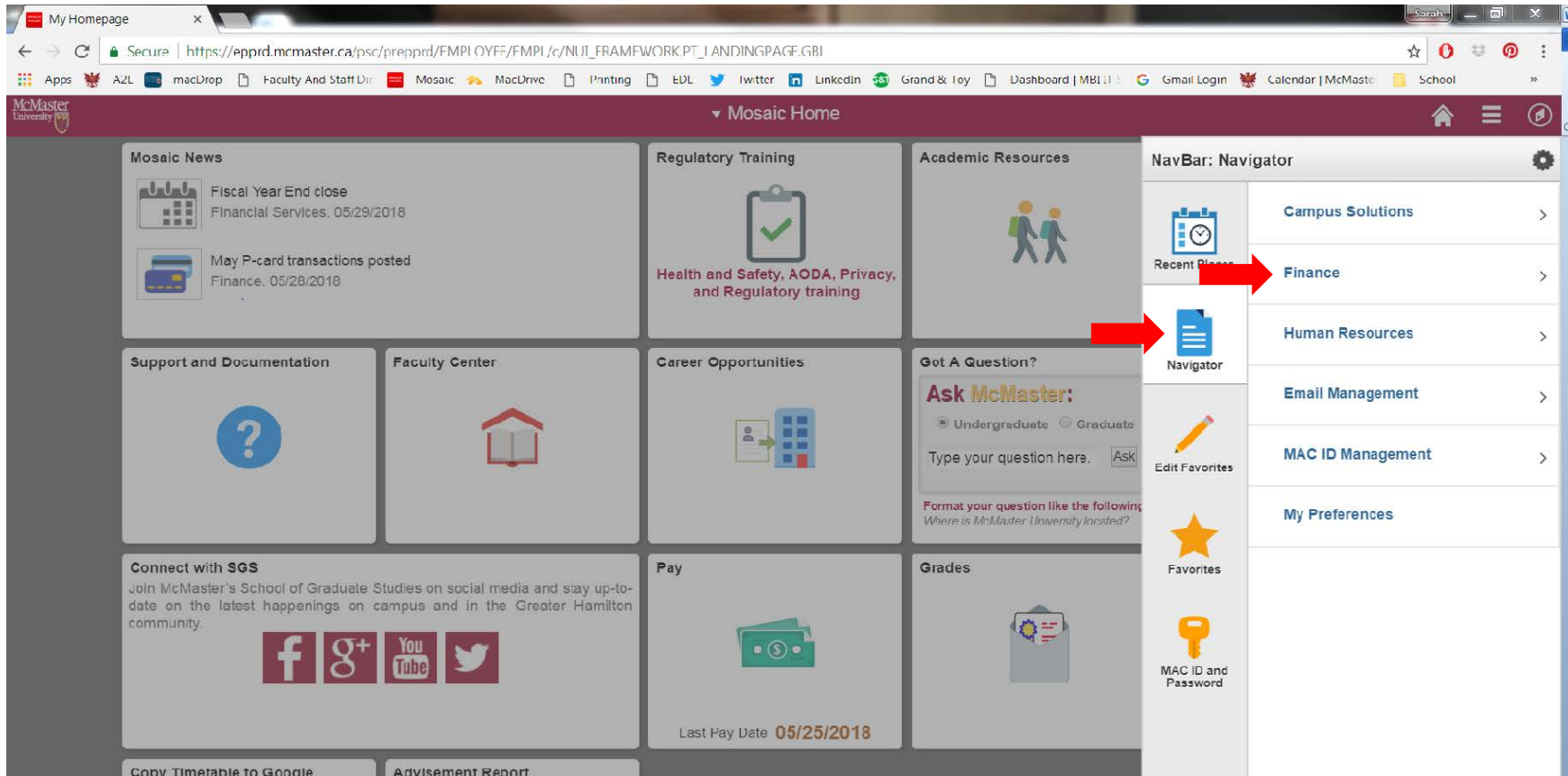


Estimated Total Value, before tax (for goods & services over term of contract):	\$	
Original Term Value: \$		
Added Term Value: \$		

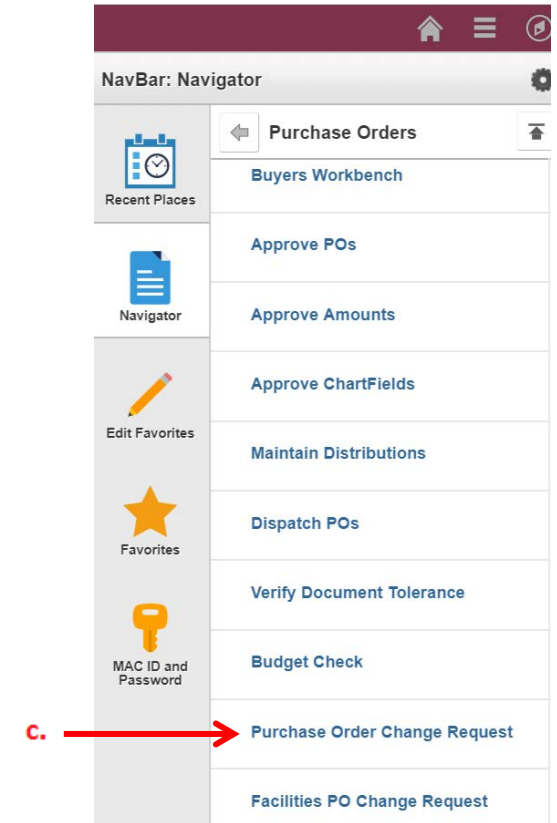
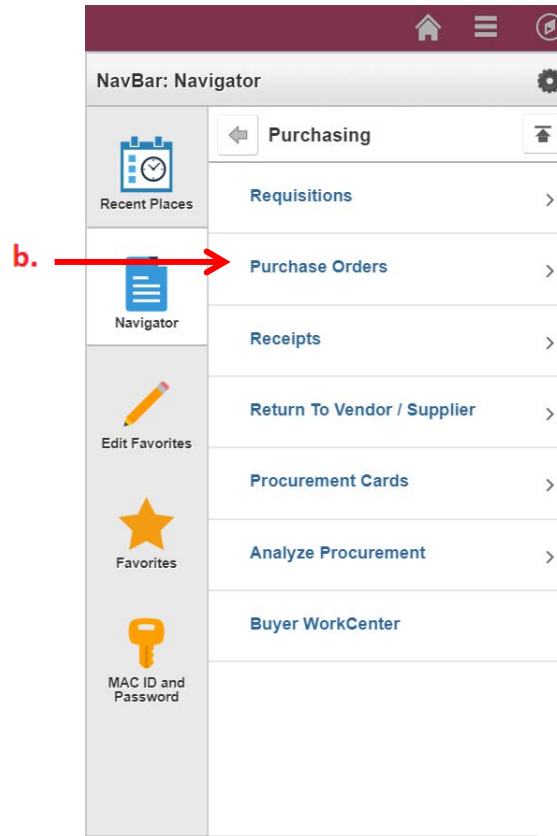
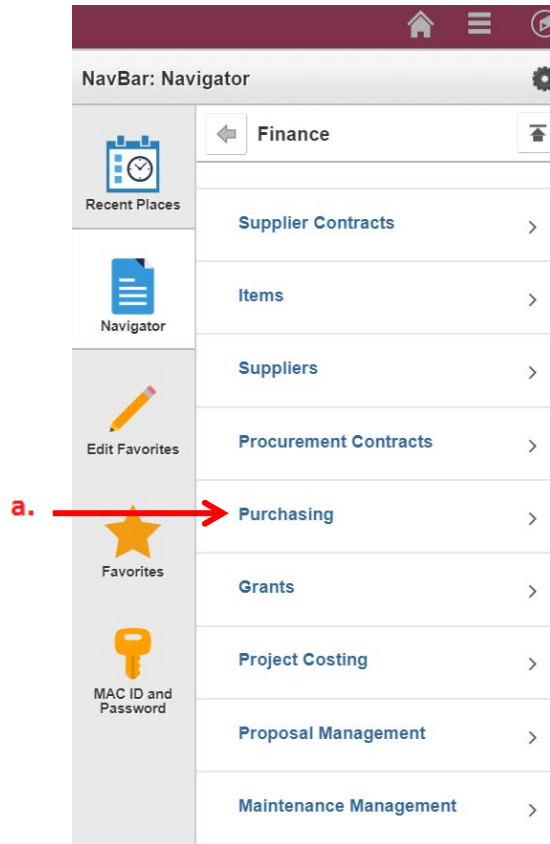
2. Login to MOSAIC
3. Select the NavBar Icon at the top of the screen



#### 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.

**Search/Fill a Form**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

**▼ Search Criteria**

Sequence Number =

Subject begins with

Document Key String begins with

Priority =

Due Date =

Approval Status =

**Case Sensitive**

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

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

The screenshot shows the 'Purchase Order Change Request' form on the McMaster University system. The form is titled 'Purchase Order Change Request' and includes the following sections:

- PO Header:**
  - \*Subject: [Text Field]
  - Priority: 3-Standard
  - Due Date: [Date Picker]
  - Status: Initial
- PO Line Details:**
  - Item: [Text Field]
  - PO Quantity: [Text Field]
  - Units of Measure: [Text Field]
  - Price (Per Item): [Text Field] (highlighted with a red arrow)
- More Information:** [Text Area] (highlighted with a red arrow)
- Save:** [Button] (highlighted with a red arrow)

Under **PO Line Details**, the **Price (Per Item)** list the dollar 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 3<sup>rd</sup> tab called 'Attachments' to attach the **Sole Source Form**. Also attach any backup you have to support the additiion of funds (i.e. quote, pricing, contract).

The screenshot shows the 'Attachments' tab of a 'Purchase Order Change Request' form. The form title is 'Purchase Order Change Request' and the subject is 'Conmpl'. There are two sections for attachments: 'Download Templates' and 'Upload your attachments'. The 'Upload your attachments' section has a table with columns for 'Description', 'Attached File', 'Attach', and 'Open'. A red arrow points to the 'Attach' button in the first row of this table. Below the table is a 'Notify' button and navigation links for 'Form', 'Instructions', and 'Attachments'.

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

The screenshot shows the 'Form' tab of a 'Purchase Order Change Request' form. The form title is 'Purchase Order Change Request' and the sequence number is '8282'. The subject is 'test'. The priority is '3-Standard' and the due date is '20/04/2016'. The status is 'Initial'. There are two buttons: 'Preview Approval' and 'Submit'. The 'Submit' button is circled in red.

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.