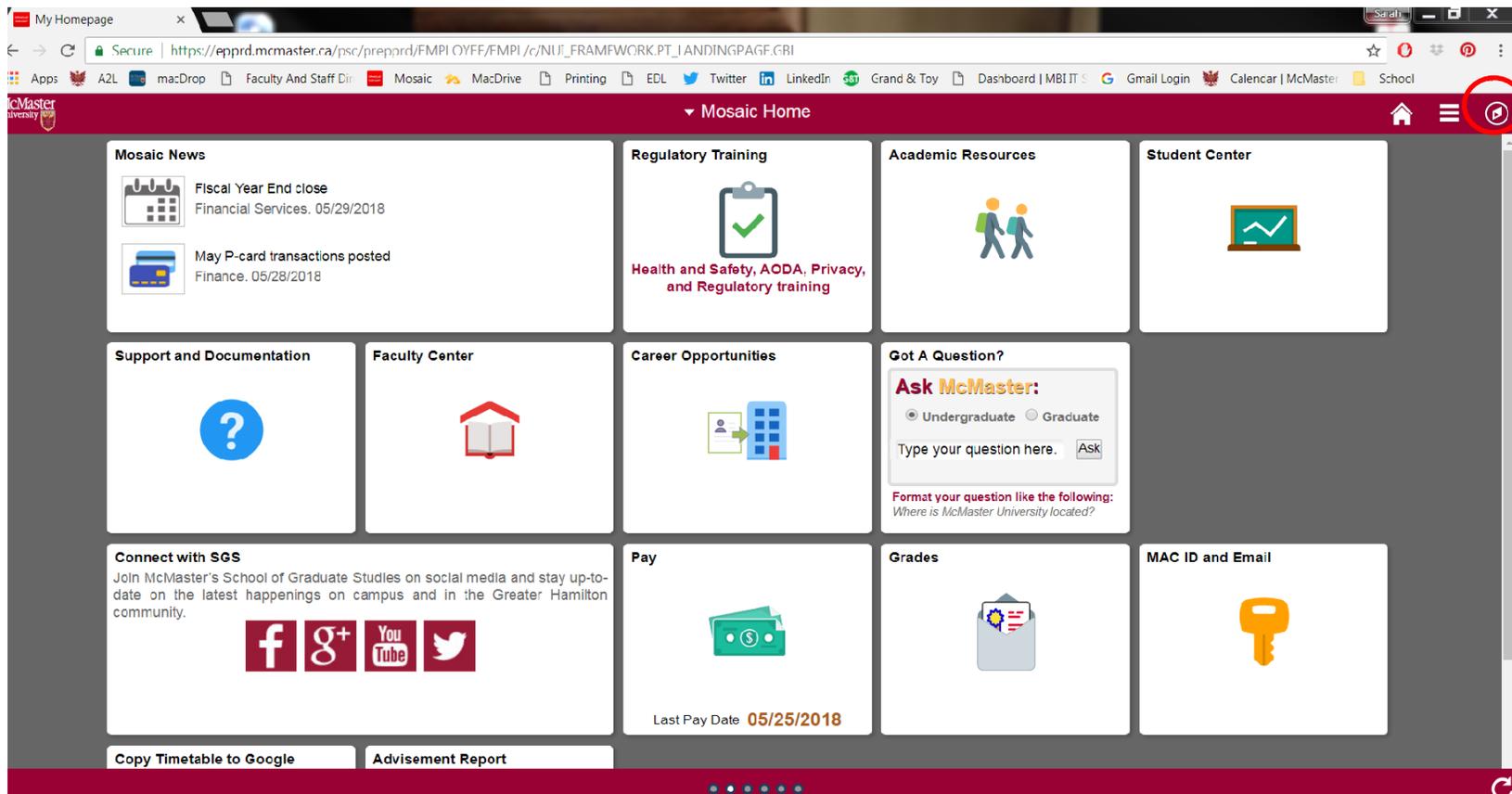


How to Request a Change Order: Under \$100,000

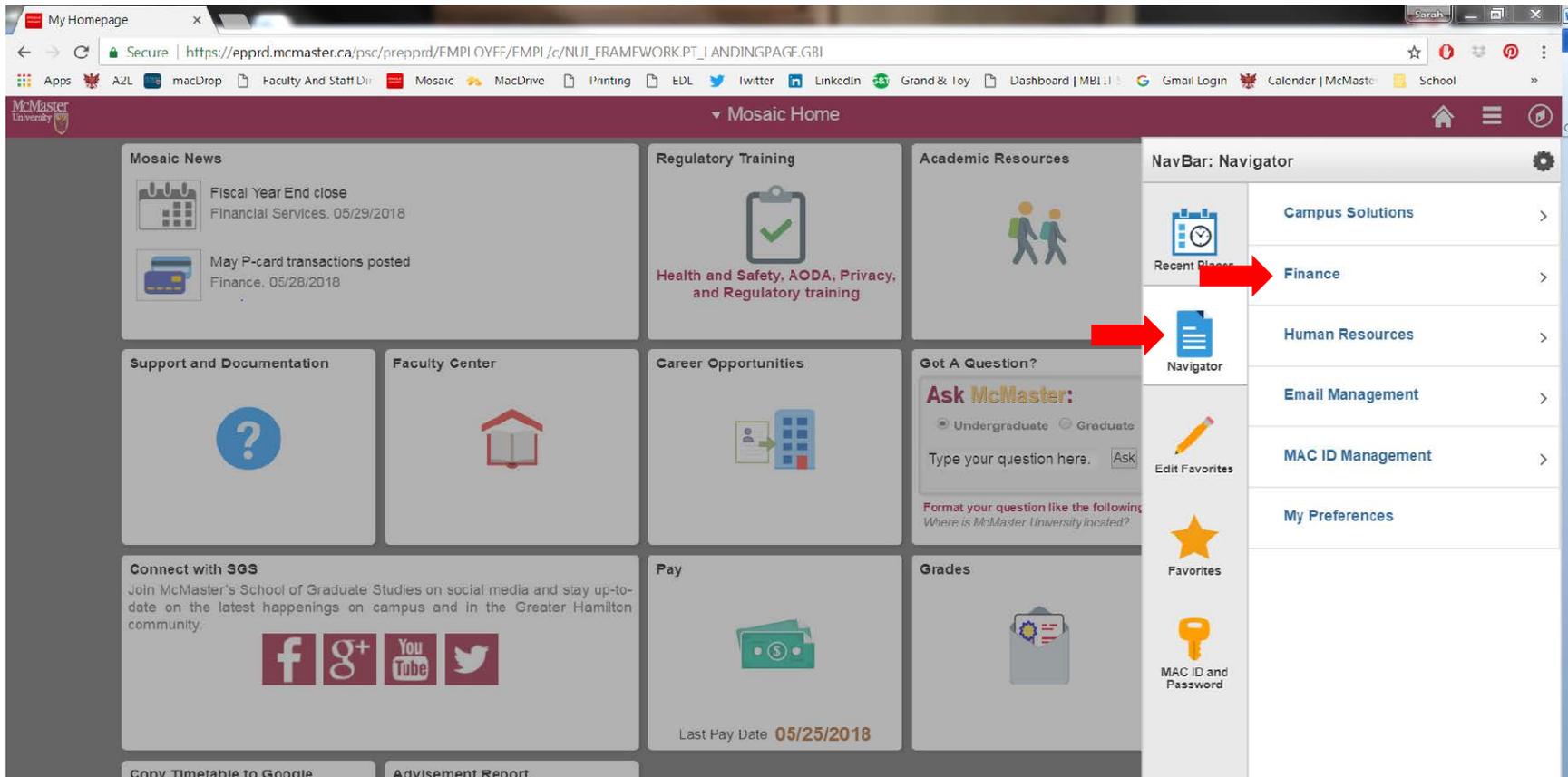
*The total of the purchase order + new funds added must be under \$100,000 before taxes.

If it is over \$100,000 a Signed Sole Source is required (see separate instruction sheet on Change Orders on Purchases \$100,000 & Greater).

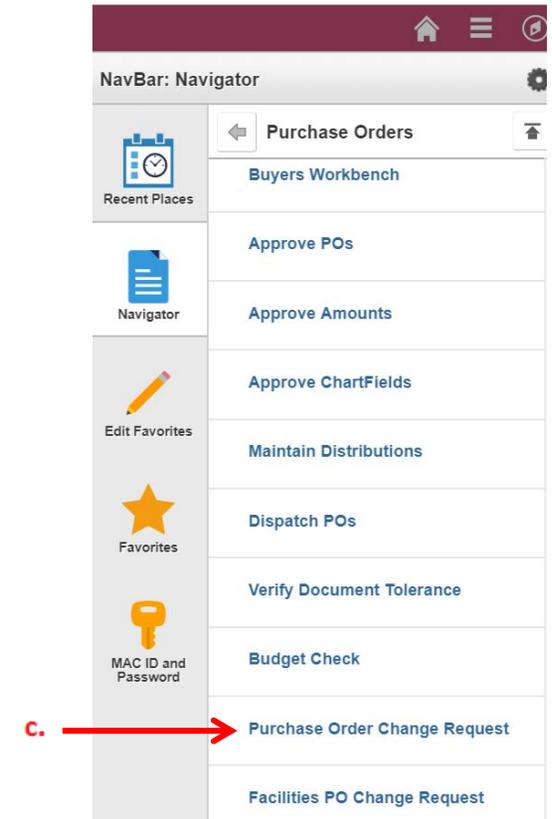
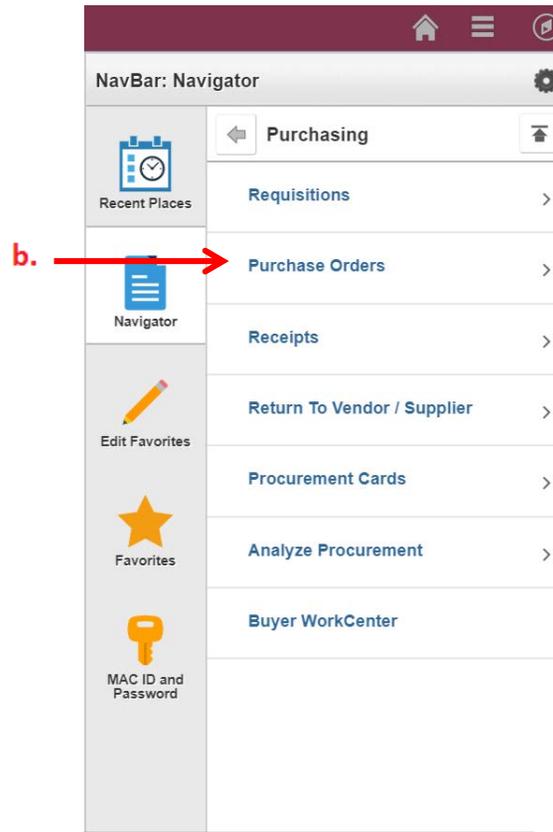
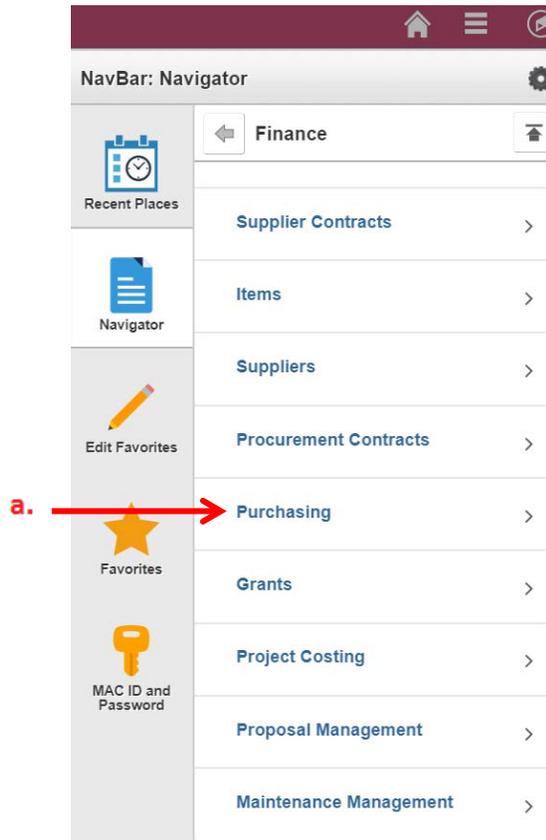
1. Login to MOSAIC
2. Select the NavBar Icon at the top of the screen



3. Select 'Navigator', then 'Finance'



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



5. 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

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

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

6. Complete the Purchase Order Change Request form.
7. 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]
- More Information:** [Large Text Area]
- Save:** [Button]

Red arrows point to the 'Price (Per Item)' field, the 'More Information' section, and the 'Save' button.

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).

8. Go to the 3rd tab called 'Attachments' to attach any backup you have to support the addition of funds (i.e. quote, pricing, contract).

The screenshot shows the 'Attachments' tab of a 'Purchase Order Change Request' form. The subject is 'Conmpl'. There are two tables: 'Download Templates' and 'Upload your attachments'. The 'Upload your attachments' table has one row with an empty description and an 'Attach' button circled in red. A red arrow points to the first row of this table.

Description	Attached File	Open
1		Open

*Description	Attached File	Attach	Open	
1		Attach	Open	+

9. 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 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 'Preview Approval' and 'Submit' buttons, with the 'Submit' button circled in red.

Seq # 8282

*Subject test

Priority 3-Standard

Due Date 20/04/2016

Status Initial

Preview Approval Submit

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.