eVA Next Change Order Quick Reference Guide

Preface

Change Orders are an important tool in the Procurement process. Ideally, invoices & deliveries that we receive should match the Purchase Order. In the new eVA, Change Orders are called Amendment Requests and create Amended Purchase Orders. This guide should be used as a general reference and supplements the **Change Order Process Guidance** document which defines the procedure for individual change order scenarios.

Creating an Amendment Request

Once you have a Purchase Order you wish to amend pulled up, you should follow this flow to ensure the amendment is processed correctly!

1. From the Action Bar at the top, click “Change Order”
    a. If this button is absent, look at the ‘Status’ field
        i. Denied – You can’t process an amendment on a denied PO
        ii. In Progress – You can’t process an amendment until the PO integrates
        iii. Amended/Ordered – You must navigate to the most recent Amendment document using the bottom-most hyperlink in the “Order’s Amendment” section in the top-right of the page.
2. At the top, begin filling out the ‘Change Order’ section
    a. “Significant Change Request?” is not currently used (defaults to “Yes”)
    b. “Amend Number” is chosen by the system
    c. “Change Type(s)” should be filled out with the value from the appropriate scenario in the ‘Change Order Matrix’ document
    d. “Description of Changes” is a free-form field where you can describe your changes in detail.
3. Below the ‘Change Order’ section is the ‘Header’ section
    a. Update the “Name” to reflect the PO you’re amending
        i. This can be done easily by copying the text listed in the ‘Order’s Amendment’ section to the left, pasting it in “Name” and adding “CHANGE ORDER” to the beginning.
    b. Check “Bypass Integration” if:
        i. The original REQ/PO was bypassed
        ii. Instructed to do so in the ‘Change Order Matrix’ document
4. Make the appropriate changes using the ‘Change Order Matrix’ scenario as a guide
5. Click “**Submit for Approval**” at the top to begin processing the request
    a. The amended PO will become available once fully approved

You have now completed your portion of the Amended Requisition and can review its progress in the ‘Workflow’ tab. You can also cancel an amendment request at any time before it creates an Amended PO by clicking “Other Actions” and then “Cancel Requisition”.

***Please Note: Change Orders encumber the full amount +/- the change**

Approving an Amendment Request

As an approver you will likely come across Amendment Requests require your approval. These have extra fields you can use to evaluate the request.

1. At the top, review the 'Change Order' section
    a. "Change Type(s)" should give a general idea of the request
    b. "Description of Changes" should give a detailed summary of the changes
2. To the right of the 'Header' section is the 'Order's Amendment' section
    a. Here you will find hyperlinks to all of the previous PO versions
3. The Sidebar on the left has the 'Log' icon to navigate to the "Amendment Log" tab
4. At the top, you will see the details from the 'Change Order' section
5. Below the 'Header' section is the 'Details' section where you can click through the various tabs to review the changes
    a. Header – Will indicate changes made to the following header fields:
        i. Organization
        ii. PO Category
        iii. Requestor
        iv. Procurement Transaction Type
    b. Addresses – Will indicate changes made to the "Ship to" & "Bill to" fields
    c. Items – Will list changes to line items, including adding or deleting lines
        i. Note: 'Item Changes' will update when the change order is fully approved and a PO is created
    d. Allocations – Provides a direct comparison between the line allocations on the PO being amended and the current amendment request
6. After review, you can click "Approve" or "Reject" at the top
    a. Note: If you choose to "Reject" you will have to provide a reason

You have now completed your portion of the Amended Requisition and can review its progress in the 'Workflow' tab.

Reviewing an Amended Purchase Order

Once an Amendment Request is fully approved, it will create an Amended PO. This supersedes the original PO, even if this amended version fails to integrate. It can be Amended, Received, Canceled & Printed just like a normal PO. It also carries details of what changes were made between the versions:

1. From the Sidebar, Click the 'Log' icon to navigate to the "Amendment Log" tab
2. At the top, you will see the details from the 'Change Order' section
3. Below the 'Header' section is the 'Details' section where you can click through the various tabs to review the changes
    a. Header – Will indicate changes made to the following header fields:
        i. Organization, PO Category, Requestor and Transaction Type
    b. Addresses – Will indicate changes made to the "Ship to" and "Bill to" fields
    c. Items – Will list changes to line items, including adding or deleting lines
    d. Allocations – Provides a direct comparison between the line allocations