

PO Amendment Process for Subawards:

FAQs:

Question: Under what circumstances should I initiate a Purchase Order (PO) Amendment for a Subaward?

Answer: Upon receiving a fully executed modification to an award, the department administrator should initiate a Purchase Order Amendment webform ([Webform FIN Purchase Order Amendment](#)). This form should be used for a time extension (at cost or no cost) and/or funding changes (increase or decrease). The PO Amendment Webform should be sent to the appropriate Contract & Grant Specialist (C&G) for approval*. Once approved by the Research Office, Procurement will amend the PO.

*Note: if the Research Office is not on the Amendment PO webform approval chain, your C&G should be manually added.

Instructions for Purchase Order (PO) Amendment Webform for Subawards:

This is used when changes to an existing subaward purchase order is required once a fully executed modification is in place. This amendment webform will allow a user to fill in the Requisition ID or the purchase order number and this will display all the pertinent information from the already existing purchase order. The form can then be routed for approval of the change.

You can also use the PO Amendment Request webform to “close” an existing purchase order.

PO Amendments are entered on three pages, instructions follow for each page:

Use of your browser's "back" button will cause you to lose any information that you have entered on your form - please use the form buttons only - found at the bottom of the form.

After going to “Blanks” in webforms, click on [FIN Purchase Order Amendment](#). On the first page - Enter header information

PAGE 1- Enter header information

1. Select the business unit: UOD01
2. Enter the Purchase Order number to be modified.
3. Close PO- Select the appropriate option: Yes or No
4. Add the Reason for the Amendment (Example: Amendment No. 3).
5. Upload the fully executed modification if available and/or required.

PAGE 2- Enter line items Line 1:

1. Enter the item category (153200 <\$25K or 153300 >\$25k)
2. Enter a short description (Example: Amendment 3 increase for subaward xxxxx)
3. Enter a long description (Example: Amendment 3 increases subaward xxxxx by \$2,900 and extends the period of performance to 3/31/2015). The more detail is better.
4. Unit of Measure: Choose 'Average Cost Dollars' or 'Each'.
5. Quantity: Enter "1"
6. Unit Cost: Enter the amount you want to increase or decrease the subaward by. If decreasing, use a "minus" sign. Example: -2,900
7. Line Total: enter the amount of the increase or decrease (same amount as Step 6, Unit Cost). If decreasing, use a "minus" sign. Example: -2,900
8. Funding: look up and enter your purpose code; add amount of increase or decrease (same amount as Step 6 and 7). If decreasing, use a "minus" sign. Example: -2,900
9. Click 'Add this item'. The information entered will populate in the webform. Review it for accuracy and edit or delete as necessary (right side of the screen).

NOTE: If processing a **no cost extension** on a subaward, you should follow steps 1-5 above. For items 6-8, enter 0.00 for the dollar amount. Continue with the remaining directions.

If **closing a PO**, select 'Yes' on page 1, then follow steps 1-5 above. Your short and long descriptions can state, "Close PO". For items 6-8, enter 0.00 for the dollar amount. Continue with the remaining items.

Line 2:

Follow the steps for Line 1, 1 through 9 above, if you need to add a second line. For example, if you are increasing a subaward on both accounts 153200 and 153300, you will need to follow steps 1 through 9 above to add a second line.

10. Click 'Next Step'

PAGE 3- Routing

1. Enter look up or add UD IDs for employees that you either want copied or to approve. Your Contract & Grant Special should approve the PO Amendment Webform.
2. Click "Finish and submit" button.