



University of Connecticut Health Center HuskyBuy Training Manual

PROCEDURE NUMBER: 2010-P10

HOW TO REQUEST A CHANGE ORDER

OVERVIEW:

This form is required to request an amendment to an existing standing order. However, users may be assigned a change order request form from the HuskyBuy Solutions Team due to invoice discrepancies; if this is the case view *Procedure #2010-P8 How To Submit Your Purchase Requisition* for further instructions. Refer to University of CT Health Center Policy Number 2006-21 (Purchase Order Types Document) for purpose, scope, policy statement, definitions, and responsibilities. View audio visual *Lesson #12 Change Order Process* for additional information.

PROCEDURE:

STEP 1: SEARCH FOR CHANGE ORDER REQUEST FORM

- Select **forms** on the navigation tab.
- Scroll down and search for the applicable form.
- Click on **Change Order Request**.

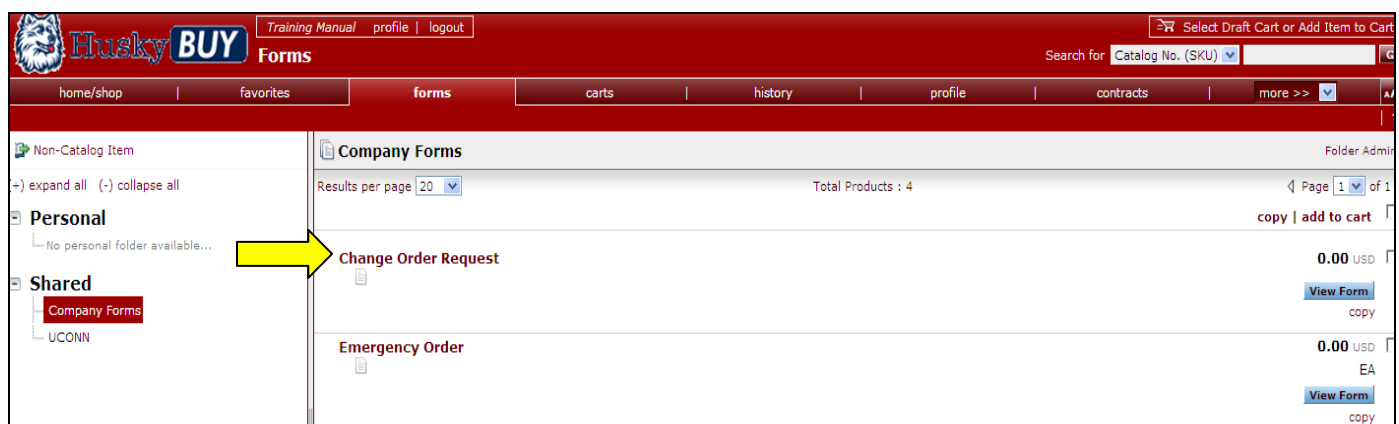


Figure 1

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STEP 2: COMPLETE CHANGE ORDER REQUEST FORM

Supplier Section

- 1. Enter Supplier** – enter the Supplier’s name. Once the name appears click on the Supplier’s name to select it.

NOTE: To search for a Supplier, click on supplier search and a pop-up box will appear. Click on Search and the entire supplier list will appear. Click on Select next to the correct Supplier’s address.

The screenshot shows the 'Change Order Request' form. It is divided into three main sections: 'Supplier Section', 'PO Reference Section', and 'Revision Justification Section'. In the 'Supplier Section', there is a text input field labeled 'Enter Supplier' and a link labeled 'or supplier search'. A yellow arrow points to the 'Enter Supplier' field, and a blue box with the number '1' is placed over the 'or supplier search' link. The 'PO Reference Section' contains fields for 'PO Reference', 'Invoice Reference', and 'Number'. The 'Revision Justification Section' has a large text area for 'Revision Justification' with a '500 characters remaining' indicator and 'expand | clear' options.

Figure 2

The screenshot shows the 'Supplier Search' pop-up box. It has a search input field, a 'Results per page' dropdown menu set to '20', and two buttons: 'Search' and 'Cancel'. A yellow arrow points to the 'Search' button.

Figure 3

The screenshot shows the 'Suppliers found: 95' results page. It displays a table with columns for 'Supplier Name/Address' and 'Select'. The table lists several suppliers, including 3m Company, ABCO Welding & Ind Supply, Accredo Health Group, Advanced Computer Technologies, Alternative Supplier, Ameridose LLC, Arthrex Inc, and Bartholomew Company Inc. A yellow arrow points to the 'Select' button for the first supplier, 3m Company.

Supplier Name/Address	Select
3m Company	
BU Corporate 1: GENERAL OFFICES/3M CENTER ST. PAUL, MN 55144 US	Select
BU Corporate 2: 2111 MCGAW AVENUE IRVINE, 92714 US	Select
BU Corporate 3: SERVICE CENTER BLDG. 275-4W-02, 3M CENTER ST PAUL, MN 55144-1000 US	Select
BU Corporate 4: SUITE 200 - BLDG 502 3350 GRANADA AVENUE NORTH OAKDALE, MN 55128 US	Select
ABCO Welding & Ind Supply	
BU Business 1: 1608 John Fitch Blvd Fulfillment Center South Windsor, CT 06074 US	Select
Accredo Health Group	
BU Corporate 1: WARRENDALE & WEXFORD PO BOX 99768 CHICAGO, IL 60690-7468 US	Select
Advanced Computer Technologies *	
Business 1: 108 MAIN STREET NORWALK, CT 06851 US	Select
Alternative Supplier	
Fulfillment Address 1:	Select
Ameridose LLC	
BU Corporate 1: PO BOX 4140 WOBURN, MA 01888 US	Select
Arthrex Inc	
BU Corporate 1: 1370 Creekside Blvd Naples, FL 34108 US	Select
Bartholomew Company Inc	
Business 1: 3324 MAIN STREET HARTFORD, CT 06120 US	Select

Figure 4

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PO Reference Section

- 2. PO Reference** – enter the original purchase order number in which this adjustment is being made for.
- 3. Invoice Reference Number** – this field is to be completed by the HuskyBuy Solutions Team for assigned change order request forms due to invoice discrepancies.

Revision Justification Section

- 4. Revision Justification** – enter a detailed explanation to document the reason for the purchase order adjustment. For example, this request is to add \$3,000 to pay ongoing invoices throughout the fiscal year.

The screenshot shows a web form titled "Change Order Request". At the top right, there are "Available Actions" including "Add and go to Cart", "Go", "Close", and a printer icon. The form is divided into three main sections: "Supplier Section", "PO Reference Section", and "Revision Justification Section".
- The "Supplier Section" has a text input field labeled "Enter Supplier" with a sub-label "or supplier search".
- The "PO Reference Section" contains two input fields: "PO Reference" (with callout 2) and "Invoice Reference Number" (with callout 3).
- The "Revision Justification Section" is a large text area (with callout 4) for entering a justification, with a "500 characters remaining" indicator and "expand | clear" links at the bottom right.

Figure 5

Line Item Section

Depending on which line item from the original purchase order you want to make changes to you must indicate the change under the correct line item. For example, if you need to change the unit price for line item 3, you must scroll down to the third line item and complete the required fields.

- 5. Part# & Description** – enter detailed information about the product or service. This can include the product name and a description of the product. Also include the catalog number (SKU) or part number of the required item.
- 6. Unit Price** – enter the maximum cost of the product or service (i.e. construction project, advertising) for the full fiscal year.
- 7. Quantity** – enter "1".

NOTE: View audio visual *Lesson #13 Standing Order Process* for additional information.

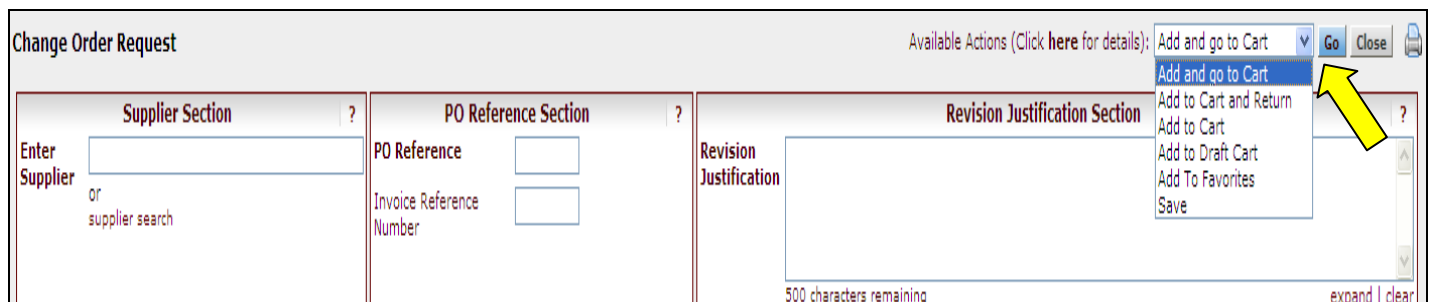
The screenshot shows a form titled "Line Item Section 1". It has three main input fields: "Part# & Description" (with callout 5), "Unit Price" (with callout 6), and "Quantity" (with callout 7). The "Part# & Description" field has a "100 characters remaining" indicator and "expand | clear" links at the bottom left.

Figure 6

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STEP 3: ADDING A CHANGE ORDER REQUEST FORM TO YOUR SHOPPING CART

- Click on the drop-down arrow located to the right of the **Available Actions** field to choose an “add to” preference.
- **Add And Go To Cart** – will add the item to your currently active shopping cart and redirect you to the **cards** navigation tab and **active carts** sub-tab.
- **Add To Cart and Return** – will add the item to your currently active shopping cart and allow you to complete another change order request.
- **Add To Cart** – will add the item to your currently active shopping cart.
- **Add To Draft Cart** – will add the item to an existing draft shopping cart.
- **Add To Favorites** – will add the item to a destination folder. You have the ability to rename the item as well as create a new folder. View audio visual *Lesson #5 Managing Favorites* for additional information.
- Select an “add to” preference and click on **Go**.



The screenshot shows a web form titled "Change Order Request". It is divided into three main sections: "Supplier Section", "PO Reference Section", and "Revision Justification Section". The "Supplier Section" has a text input field for "Enter Supplier" with a "supplier search" link below it. The "PO Reference Section" has two input fields for "PO Reference" and "Invoice Reference Number". The "Revision Justification Section" has a large text area for "Revision Justification" with a "500 characters remaining" indicator and "expand | clear" links at the bottom right. In the top right corner, there is a label "Available Actions (Click here for details):" followed by a dropdown menu. The dropdown menu is open, showing options: "Add and go to Cart", "Add and go to Cart", "Add to Cart and Return", "Add to Cart", "Add to Draft Cart", "Add To Favorites", and "Save". A yellow arrow points to the "Add and go to Cart" option. To the right of the dropdown are "Go" and "Close" buttons.

Figure 7

NOTE: To assign your shopping cart, proceed to *Procedure #2010-P3 How To Assign An Active Shopping Cart* for further instructions.

NOTE: To place your order, proceed to *Procedure #2010-P8 How To Submit Your Purchase Requisition* for further instructions.