Purchase Order Amendment • Workflow

Legend:
- Interface
- e-doc
- External System
- Batch Job
- System Function
- Manual Process

When Unordered Items are Received

When Changing an Order

Receiver adds items to Line-Item Receiving (RCVL) e-doc

Requisition (REQS) initiator selects Amend on Purchase Order (PO)

KFS creates Purchase Order Amendment (POA)

Fiscal officer approves; adds account numbers

Is order less than $5000?
- NO → Does account have C&G responsibility?
  - YES → Routes to C&G processor
  - NO → Commodity review required?
- YES → Commodity review required?

Separation of duty reviewer added when initiator is the only one in the route log.

Commodity review required?
- YES → Routes to commodity reviewer → Is order over $10,000?
- NO → Is order over $10,000?

Is order over $10,000?
- YES → Unapproved PO created
- NO → Unapproved PO created

PO created with status Pending CM Assignment (see PO workflow for next steps)

Contract manager assigns and submits

Unapproved PO created

Do accounts have insufficient funds?
- YES → Budget reviewer approves *(budget review is under analysis)*
  - NO →
- NO → Is PO to a nonresident alien or employee?

Budget reviewer approves *(budget review is under analysis)*

Is PO to a nonresident alien or employee?
- YES → Tax manager approves
  - NO →
- NO → Is PO over transaction authority amount?

Tax manager approves

Is PO over transaction authority amount?
- YES → Organizational review (transaction authority)
  - NO →
- NO → PO status becomes Open

Organizational review (transaction authority)

PO status becomes Open

File created for vendor through SciQuest

Vendor sends invoice or eInvoice

Payment Request (PREQ) created (requires approval based on approval limits)
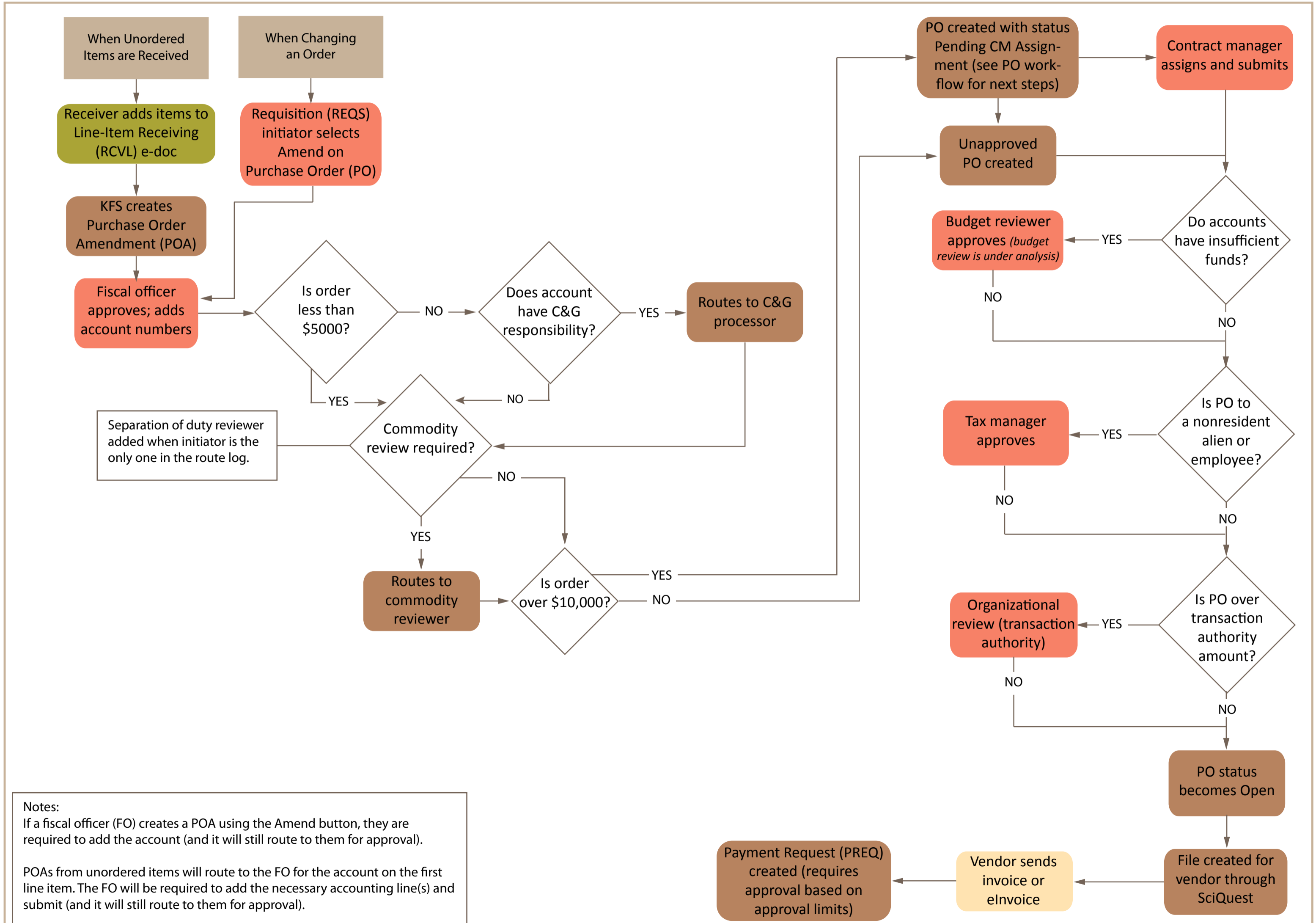
Notes:
If a fiscal officer (FO) creates a POA using the Amend button, they are required to add the account (and it will still route to them for approval).

POAs from unordered items will route to the FO for the account on the first line item. The FO will be required to add the necessary accounting line(s) and submit (and it will still route to them for approval).

For illustrative purposes only. Updated 23 July 2013.