Change Order- FPACHAR

The Change Order form (FPACHAR) is used to adjust header, commodity, and accounting information on an approved purchase order. This form will allow you to increase/decrease quantity and unit price as well as add commodity lines. Changes to vendor, currency code and document type cannot be made via a Change Order. In order to make those types of adjustments, the PO must be closed and a new requisition submitted.

- Navigate to FPACHAR

  * If you do not know the Purchase Order number – see Appendix A

- Enter PO number in Purchase Order Field

- Tab to Change Sequence and type NXT then Next Block to the header fields.

  * If Change Order will not open, see Appendix B

- Add Document Text to explain what adjustments are being made. Include the date of the Change Order, along with the total of the increase or decrease.
• Next Block through Purchase Order until you reach the Purchase Order Item Selection

• Check the Added Box next to the preexisting line items that you are changing. However, if you are adding new lines, the Added box does not need to be checked.

• Save (F10) and Close (Ctrl Q)
• Adjust items to reflect a revised Purchase Order.
  * Remember, the new amount should reflect the total amount of the PO. The remaining balance should not be used in determining the new PO amount.

  o Adjust Quantity from 1 to 2

  o Adjust Unit Price from 4,000 to 3,000

  o Add Commodity:
    ▪ Add: Navigate to last commodity line and select Insert Record (F6) and add commodity (same as creating a requisition)
- Change FOAPAL
  - Select Commodity with incorrect FOAPAL and Next Block to Accounting section
  - Check % box next to Extended and type zero in the amount field
  - Insert Record (F6) and add new FOAPAL Information
- Select Next Block to Complete
Appendix A – FOIDOCH (Document History)

FOIDOCH is a Banner form used for finding Banner documents that related to one another. From here you can reference a Requisition, Purchase Order, or Encumbrance in order to find corresponding documents such as Invoices, Checks, etc.

- Navigate to FOIDOCH

- Enter “REQ” in Document Type to indicate a Requisition is your search Parameter

- Enter Requisition Number in Document Code Section
- Select “Next Block” to find all documentation pertaining to Requisition. The Purchase Order section will give you the information you need to begin your Change Order.

- Go to Options/FPIPURR to view FOAPAL information.
Appendix B – Change Order will not Open

- If Change Order will not open, view the bottom left hand of screen for error message.
  
  - If there is a previous change that is incomplete or not approved, then search for the previous change order.
    
    - Search (F9) from the Purchase Order field.
      
      - Enter your search criteria, at a minimum the PO number.
        
        - Execute Query (F8) and search for the Incomplete or Not Approved document.
          
          - If Completed has a status of “N”, select (Shift + F3) to edit.
            
            - If Completed has a status of “Y” and Approved “N”, a previous change order is still in the approval process. Banner requires that change order to be approved before a new one can be submitted.
              
              - If the Purchase Order is closed, a Change Order cannot be completed, and a new requisition will need to be submitted.
                
                - If the Purchase Order has an existing encumbrance close document, contact your Budget Analyst for assistance.