**Instructions for new online PO Change/Liquidation Form**

**Access form here**

1. When you access the form, your name, department, phone number, & email will already be prefilled.
   - Please note: if you don’t have a phone number on file, it won’t be populated, and therefore you will be required to fill in this field

   ![Form Image]

   - Make sure all the information is correct
   - If you are an assistant or intern that is filling out this form on behalf of someone, please indicate so by checking the box ‘if you are not the originator of the document, check here’
     - This will prompt you to fill in the requestor’s name

   ![Form Image]

   Identify the requestor
2. This form can be used for three (3) purposes:
   - Purchase Order Change
   - Purchase Order Liquidation
   - Requisition Close
To Request a PO Change Order:

A change order to a purchase order must be issued when any of the following elements need to be changed: price, quantity, delivery date, and/or scope of work.

- A change order is **not** required when the value of the change is 10% of the original PO, up to $100.

**Step 1**

Type in the Purchase Order #

**Step 2**

Type in the Supplier Name

- If you need to change the description/quantity/unit price, refer to **Step 3** *below*
- If your PO requires a text change, refer to **Step 4** *below*
- If you need to change any accounting information, refer to **Step 5** *below*

**Step 3**

‘Change Description/Quantity/Unit Price’

- If you are changing a line number refer to this section, if not leave blank
- To increase PO amount:
  - Include ‘Current Unit Price’ & ‘New Distribution Unit Price’
  - Leave the other areas blank

To increase PO amount: Just fill in the ‘Current Unit Price’ & the ‘New Distribution Unit Price’

If you are changing the line number or need to add additional lines, please do so here.
**Step 4**

*Change Document Text*
- Click ‘yes’ only if applicable

**Step 1:** Click ‘Yes’

**Step 2:** Add new text or text changes into this space

**Step 5**

*Change Index or Account Distribution*
- Use if you need to change the accounting information listed on your PO
- Indicate whether the distribution is in ‘Dollar’ or ‘Percent’

**Step 1:** Indicate the distribution type

**Step 2:** Enter the required accounting information.

*NOTE:* To locate your Seq. #, please review this section

- For ‘Seq. #’, go to Banner Finance and locate
  - myNEU > Services & Links > Self-Service Banner (SSB) > Finance > View Document
  - Search for your PO
    - Choose Type: Purchase Order
    - Document Number: (enter in your PO number)
  - Click ‘View Document,’ another page will produce
    - Scroll to the bottom of the page to ‘Purchase Order Accounting’
    - Seq.# should be available
This is the Seq. # you will need to change the accounting information on your Change Purchase Order form.

If you would like to attach any back-up documentation, you can do so in the last section prior to Submitting.

By clicking submit, you are authorizing the request.
To Request a PO Liquidation/Close:

If you need to add additional PO’s to be liquidated, click the down arrow.

Step 1: Enter PO Number & Supplier Name
To Request a Requisition Close:

1. Follow the same procedures as you would for PO Liquidation request, however use your Requisition #.