STATE OF RHODE ISLAND
DEPARTMENT OF ADMINISTRATION
DIVISION OF PURCHASES

RIFANS

CHANGE ORDER INSTRUCTIONS
ELECTRONIC CHANGE ORDERS
PAPER CHANGE ORDER FORMS
CHANGE ORDER REQUISITIONS

4/20/2016
The electronic change order process can be utilized for changing Blanket Releases, Contract Releases, and Standard Purchase Orders under $5000.00. These would all have “Autocreate” as a buyer. A change order form is not required.

The person who created the requisition for the purchase order will have to be the one to do the electronic change order. Here are the instructions for the electronic change order process:
LOG IN

User Name
Password
Login | Cancel

Forgot your password? State Employees must contact the service desk at 574-9799. Do not use this link. Suppliers must email doa.stateports.help@doa.ni.gov

Select a Language: English

4/20/2016
**HOME PAGE**

**CLICK ON: REQUISITIONER**

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<table>
<thead>
<tr>
<th>From</th>
<th>Type</th>
<th>Subject</th>
<th>Sent</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>O’Donnell,</td>
<td>RI Requisition</td>
<td>Purchase Requisition 1437377 has been approved</td>
<td>09-Mar-2016</td>
<td></td>
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<tr>
<td>Thomas</td>
<td></td>
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<tr>
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<td>09-Mar-2016</td>
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<td>Schiapappa,</td>
<td>Requester</td>
<td>Requester Change Order Approval</td>
<td>09-Mar-2016</td>
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<td>Change Order</td>
<td>Response to Requisition 1437373 (10,000.00 USD) Change Request for Reposa</td>
<td>09-Mar-2016</td>
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<tr>
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<td>Approval</td>
<td>Sandra</td>
<td></td>
<td></td>
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<td>RI Requisition</td>
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<tr>
<td>Kimberly</td>
<td></td>
<td></td>
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SHOP SCREEN

CLICK ON: FULL LIST
## Requisitions View

**Select Requisition**

<table>
<thead>
<tr>
<th>Requisition Number</th>
<th>Description</th>
<th>Total Quantity</th>
<th>Qty Delivered</th>
<th>Qty Cancelled</th>
<th>Open Quantity</th>
<th>Creation Date</th>
<th>Status</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>13373779</td>
<td>TEST - DECEMBER SCENARIO 45 CHANGE PARENT BLANKET END DATE DO RELEASE</td>
<td>800.00 USD</td>
<td>600</td>
<td>0</td>
<td>0</td>
<td>600-09-2016 14:24:37</td>
<td>Incomplete</td>
<td>3441864-2</td>
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<tr>
<td>13373778</td>
<td>APA-14422 FY19 RENTAL FOR PARKING SPACES AT RICC</td>
<td>800.00 USD</td>
<td>600</td>
<td>0</td>
<td>0</td>
<td>600-09-2016 14:15:35</td>
<td>Incomplete</td>
<td>3441863-2</td>
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<tr>
<td>13373777</td>
<td>TEST - DECEMBER 2015 SCENARIO 42 STANDARD CRIT CAPITOL PROJECT ACCOUNT CAT-939.21 FIXED ASSET OVER $5000</td>
<td>8,000.00 USD</td>
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<td>13373776</td>
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<td>4,000.00 USD</td>
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<td>0</td>
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<tr>
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<td>900.0000 USD</td>
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<td>900000-09-2016 10:57:13</td>
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<td>TEST - DECEMBER 2015 SCENARIO 39 EXCEED WORK ORDER LIMIT ON BLANKET</td>
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<td>1500000</td>
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<td>13373733</td>
<td>TEST - DECEMBER 2015 SCENARIO 37 CONTRACT RELEASE EXCEED AMOUNT AGREED</td>
<td>5,000.00 USD</td>
<td>1</td>
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<td>0</td>
<td>1-09-2016 09:31:17</td>
<td>Approved</td>
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<tr>
<td>13373728</td>
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<td>8,000.00 USD</td>
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<td>0</td>
<td>1-08-2016 16:11:06</td>
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**Click on:** REQUISITION NUMBER

(Do not click on the radio button)
<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Need-By</th>
<th>Deliver-To</th>
<th>Unit</th>
<th>Quantity</th>
<th>Qty Delivered</th>
<th>Qty Cancelled</th>
<th>Open Quantity</th>
<th>Price</th>
<th>Amount (USD)</th>
<th>Details Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LINE#1 - RECEIVING STANDARD PURCHASE ORDER TEST</td>
<td>23-Mar-2016 00:00:00</td>
<td>06800-0025</td>
<td>Each</td>
<td>150</td>
<td>150</td>
<td>0</td>
<td>0</td>
<td>15 USD</td>
<td>2,250.00</td>
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<td>LINE#2 - RECEIVING STANDARD PURCHASE ORDER TEST</td>
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<td>06800-0025</td>
<td>Each</td>
<td>200</td>
<td>200</td>
<td>0</td>
<td>0</td>
<td>5 USD</td>
<td>1,000.00</td>
<td>3441900</td>
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<td>LINE#3 - RECEIVING STANDARD PURCHASE ORDER TEST</td>
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<td>06800-0025</td>
<td>Each</td>
<td>300</td>
<td>300</td>
<td>0</td>
<td>0</td>
<td>4 USD</td>
<td>1,200.00</td>
<td>3441900</td>
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</table>

**Total**: 4,450.00

CLICK ON: CHANGE BUTTON
THE QUANTITY AND PRICE CAN BE CHANGED AS NEEDED

*NOTE: IF CHANGING A BLANKET RELEASE THE PRICE WILL NOT BE ABLE TO BE CHANGED BECAUSE IT IS A PRE-DETERMINED PRICE FROM THE STORE.

IF A LINE IS ELIGIBLE TO BE CANCELED (LINE CANNOT BE RECEIVED OR BILLED ON) CLICK ON: CANCEL LINE BOX

TYPE IN A REASON IN THE REASON BOX (WILL NOT GO TO NEXT SCREEN IF REASON IS NOT ENTERED)

CLICK ON: NEXT
CLICK ON: NEXT

(IF APPROVERS ARE ALREADY THERE YOU SHOULD NOT HAVE TO ADD ANYTHING TO THIS SCREEN)
THIS PAGE SHOWS THE CHANGES MADE WITH THE NEW VALUE INDICATOR

CLICK ON: SUBMIT
CONFIRMATION NOTICE

SEE INSTRUCTIONS BELOW TO CHECK THE STATUS OF AN ELECTRONIC CHANGE ORDER.
TO CHECK THE STATUS OF AN ELECTRONIC CHANGE ORDER

GO BACK TO THE SHOP TAB

CLICK ON: FULL LIST
THERE WILL BE A BLUE DOT FOR A CHANGE ORDER THAT IS IN PROGRESS.

CLICK ON: APPROVED NEXT TO THE BLUE DOT
THIS PAGE WILL SHOW YOU THE APPROVAL PATH

CLICK ON: VIEW CHANGE HISTORY
THIS SCREEN SHOWS YOU THE CHANGE THAT WAS MADE AND THE DATE IT WAS REQUESTED. IT SHOWS THE STATUS WHICH IN THIS EXAMPLE IS "PENDING"

YOU SHOULD ALWAYS CHECK ON YOUR STATUS. IF THE STATUS SHOWS AS "REJECTED"

CLICK ON: REJECTED

(IT SHOULD GIVE YOU A MESSAGE AS TO WHY IT WAS REJECTED)

****** IMPORTANT******
SEE TIPS ON THE NEXT PAGE TO AVOID AN ELECTRONIC CHANGE ORDER GETTING REJECTED.

4/20/2016
Here are a few tips to help you avoid any problems:

• Make sure that the purchase order you are making the electronic change order to does not have any pending payments in process. (NO OPEN INVOICES)

• The Purchase Order to be changed should be in “Approved” status.

• The receiving should match what was billed.

• If increasing a line be sure there are enough funds in the account to cover the increase.

• If the Purchase Order to be changed is a release from a Blanket Purchase Order or Contract Purchase Order the Blanket/Contract needs to be active and not expired.

• The total increase to a Purchase Order Release against a Blanket/Contract should not exceed the Amount Agreed on the main Blanket/Contract

The electronic change order will go into “Rejected” status if the above requirements are not met.
**PAPER CHANGE ORDER FORM**

**PROCESS**

**When to use the paper change order form:**

To make a change to a Contract Purchase Agreement or a Blanket Purchase Agreement.

- Blanket/Contract Control Value (Amount Agreed) increase or decrease
- Blanket/Contract Date change
- Blanket Purchase Agreement Line description change or price change

To Request a supplier name change on a Standard Purchase Order that was created in Central Purchasing or a Blanket/Contract Purchase Agreement.

To request the cancellation of a purchase order.

**For a decrease to a Standard Purchase Order over $5000.00 or a Single/Sole Source Purchase order (Any Amount) that has been assigned to a buyer and is not a contract release or blanket release:**

Submit a Purchase Order Change form to Purchasing advising us of the change and then we will contact you to make the electronic change. The reason for this is that we need to have documentation of any changes to update our file.

Form is located on the purchasing website: [www.purchasing.ri.gov](http://www.purchasing.ri.gov)

An example of the form is on the following page.
RI-FANS CHANGE ORDER FORM

EMAIL CHANGE ORDERS TO: doa.purchangeorders@purchasing.ri.gov

This form is to be used for:
• Supplier Name Changes
• Cancellations to Blanket/Contract Purchase Agreements and Standard Purchase Orders.
• Line item changes, date changes and agreed amount changes to Blanket/Contract Purchase Agreements.

This form is not applicable for:
• Adding a line item or increasing a quantity on a Standard Purchase Order over $5000.00.
  (A change order requisition should be created and submitted for this type of change).
• Releases (Blanket/Contract) Should be processed as an electronic change order through RIFANS.

(ONLY 1 PURCHASE ORDER PER CHANGE ORDER FORM)

DATE
MPA NUMBER

PURCHASE ORDER NUMBER
SOLE SOURCE (YES/NO)

BID NUMBER
DELEGATED (YES/NO)

BUYER NAME
(as it appears on the purchase order)
GRANT (YES/NO)

AGENCY DOC I.D. NUMBER
GRANT/DELEGATED

PO END DATE

SUPPLIER NAME

TYPE OF CHANGE TO BE MADE
FROM
TO

SUPPLIER NAME (include W-9 FORM and letters from companies advising of the name change)

AGREED AMOUNT CHANGE
(BLANKET/CONTRACT)

DATE CHANGE (BLANKET/CONTRACT)

CANCEL ENTIRE PURCHASE ORDER
YES ☐

(Standard, Blanket/Contract Purchase Agreements)
(Give justification/reason below)

LINE ITEM CHANGE FOR BLANKET PURCHASE AGREEMENTS:

CODES: (A) Add Line (D) Delete Line (DC) Description Change (PC) Price Change

<table>
<thead>
<tr>
<th>Code</th>
<th>Line #</th>
<th>Description</th>
<th>Price from</th>
<th>Price to</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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</tr>
</tbody>
</table>

REASON/JUSTIFICATION: Click or tap here to enter text.

CONTACT PERSON: __________________________ PHONE NUMBER: __________________________

AUTHORIZED AGENT: __________________________ SIGNATURE __________________________

*****************************************************************************************************************************************************************************

FOR DOA PURCHASES ONLY SECTION

BUYER SIGNATURE: __________________________ DATE: ________________

INTERDEPARTMENTAL PROJECT MANAGER SIGNATURE: __________________________ DATE: ________________

DEPUTY/PURCHASING AGENT SIGNATURE: __________________________ DATE: ________________

This form can be found on the purchasing website: www.purchasing.ri.gov in the Agency Resource Center. For complete instructions on processing change orders, visit the purchasing website www.purchasing.ri.gov Agency Resource Center/Instructions and Trainings/RIFANS Instruction Manuals.

Revised: 6/1/17
CHANGE ORDER REQUISITION INSTRUCTIONS

For an increase to a Standard Purchase Order over $5000.00 or a Single/Sole Source Purchase Order (Any Amount) that has been assigned to a buyer and is not a contract release or blanket release:

A change order requisition with backup documentation attached will need to be submitted.

See Change Order Requisition Instructions on the following pages.
**SHOP SCREEN**

**CLICK ON: NON-CATALOG REQUEST**
COMPLETE THE FOLLOWING FIELDS:
• ITEM DESCRIPTION
• CATEGORY CODE
• UNIT OF MEASURE
• UNIT PRICE

***NOTE***
SUPPLIER IS NOT NEEDED WHEN CREATING A CHANGE ORDER REQUISITION.

CLICK ON: ADD TO CART
CLICK ON: VIEW CART AND CHECKOUT
REVIEW LINE

CLICK ON: CHECKOUT
ENTER:
• DOCUMENT TO CREATE – CHANGE ORDER
• TYPE OF REQUISITION
• BILL TO LOCATION

***VERY IMPORTANT***

ENTER:
Y ON THE CHANGE ORDER? FIELD
PO NUMBER TO BE CHANGED IN THE PO TO BE CHANGED FIELD
Y ON THE CHANGE WILL MAKE PO OVER 5K? FIELD IF CHANGE ORDER IS OVER $5,000.00 USD

CLICK ON: EDIT LINES
COMPLETE REQUISITION PROCESS:

- APPLY CHARGE ACCOUNT
- ADD ATTACHMENTS (IF CRITICAL EXPENSE FORM OR BACKUP DOCUMENTATION IS NEEDED FOR THE INCREASE)
CHANGING AN ACCOUNT NUMBER INSTRUCTIONS

*PURCHASING CANNOT CHANGE ACCOUNT NUMBERS AS WE DO NOT HAVE ACCESS TO YOUR ACCOUNTS.*

There are two steps to changing an account number on a Purchase Order:

**Step: 1**

Follow the electronic change order process to close out the line that needs a new account number. To close out a line that has been billed on the amount needs to be reduced to what was billed.

To close out a line that has not been received or billed on you can select the “Cancel Line” box and type in a reason.

**Step: 2**

A change order requisition will need to be submitted to add the line back to the purchase order with the correct accounting information. The requisition will be created the same as the original requisition except the Document to Create you will select “Change Order Requisition”. Fill in the “PO to Change” box with complete purchase order number including the release number if applicable.

***IMPORTANT***

Add an attachment to the change order requisition “Internal to Requisition” Attention: Donna Brennan – This change order requisition is to replace original line because of an account number change. The amount of the purchase order will not change.

When the change order requisition is received in Purchasing it will be processed to add the line back to the purchase order with the new information.

END