

# Workday Change Orders

Use this guide to change a purchase order (PO) and track the approvals.

For assistance, contact your training team:

[UHealth](#) (305 UHCORP, 310 UMMG, 320 ABLEH, 330 UMHC, 340 UMH)

[Academy](#) (200) and [MSOM](#) (500)



## Content

[Examples](#)

[Access](#)

[Initiating a Change Order](#)

[Tracking Approvals](#)

[Cancelling a Change Order](#)

[Resubmitting an Invoice](#)

[Resending a PO to the Supplier](#)

## Common Change Order Examples:

Below are a few examples of common reasons for creating a change order:

- *Dollar Amount* increase
- *Driver Worktag* change (using same header company)
- Line Item *Company* (for limitations see *Not a Change Order* below)
- Moving *Goods* to *Services*
- *End Date* extension
- Contracts
- New Attachments (e.g., Updated quotes and consulting addendums)

The following do not qualify as change orders:

- **Additional Goods Shipments** – Create a new req.
- Existing Contracts with a New Scope of Work – For each new scope of work, create a new req.
- **Driver Worktag for Invoiced Items** – Submit a journal entry.  
**For Assistance:** [help@miami.edu](mailto:help@miami.edu)
- **Supplier Name** – For technical reasons, after a PO has been issued, the supplier cannot be changed. Instead, close the original PO and create a new req.
- **PO Status is Closed or Cancelled** - Create a new req to cover the pending and remaining invoices.
- **PO Status is Change Order In Progress** – Before a new change order can be initiated, either the PO will need to be fully approved, or the change order will need to be cancelled by your procurement team:

**For Assistance:**

- UHealth: [Jose Gutierrez](#) / [Julia Scardigno](#)
- Academy/MSOM: [Ignacio Calle](#) / [Ken Pallais](#)

- **Expired Grants** – If a PO contains an expired grant, for technical reasons it cannot be changed. Instead, create a new req for the remaining amount to be invoiced. In the *Internal Memo* field, reference the previous PO number, original grant number, and the amount already paid.  
**Important:** To release any encumbrances, close the original PO.
- **UM Company** – The *Company* field appears in two req locations, the header and the line item. (e.g., 200 Academy)

The header *Company* cannot be changed. Instead, create a new req.

### Summary

Some Company combinations cannot exist on a req. (e.g., separate line items and/or split accounting)

Company		200 Academy	
Goods Order Line	Line	Company	Item Description
Q	1	200 Academy	Pencil #2, 12/pk, yell

#### Not Allowed on a Single Req

- 200 Academy & 3XX UHealth (e.g., 305 UHCORP, 310 UMMG, 320 ABLEH, 330 UMHC, & 340 UMH)
- 500 MSOM & 3XX UHealth (e.g., 305 UHCORP, 310 UMMG, 320 ABLEH, 330 UMHC, & 340 UMH)

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- **Ship-To Address** – Use one *Ship-To* address per req.
  - **Deliver-To Address** – Use one *Deliver-To* addresses per req.

### Access

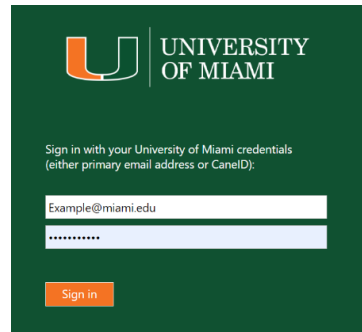
Change orders can be initiated by employees with the Workday security roles *Procurement Data Entry Specialist (PDES)* and *Cost Center Manager (CCM)* role.

### Requests

To request the *Procurement Data Entry Specialist (PDES)* security role:

1. Log in to Workday. <http://workday.miami.edu>

2. Enter your UM credentials.



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Sign in with your University of Miami credentials (either primary email address or CaneID):

Example@miami.edu

.....

Sign in

3. Complete the Microsoft Authenticator Multi-factor Authentication (MFA).



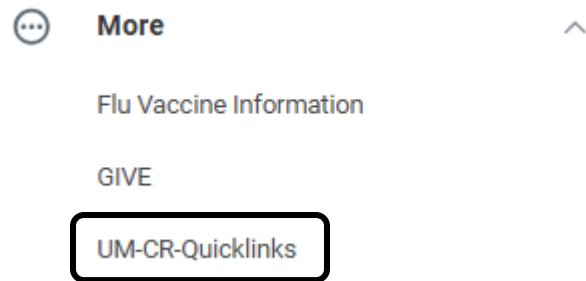
UNIVERSITY OF MIAMI

For security reasons, we require additional information to verify your account

Open your Microsoft Authenticator app and tap the number you see below to sign in.

83

4. Select the **UM Quicklinks** app.



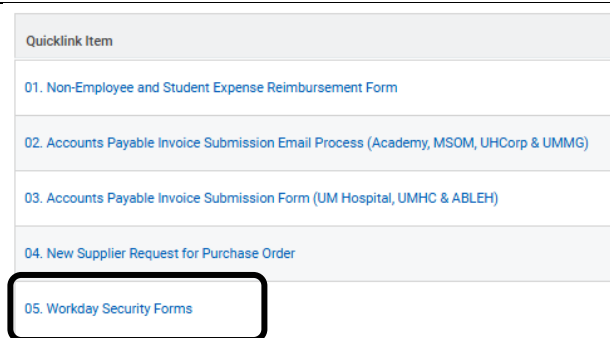
More

Flu Vaccine Information

GIVE

UM-CR-Quicklinks

5. Select the **Workday Security Forms**.



Quicklink Item

01. Non-Employee and Student Expense Reimbursement Form

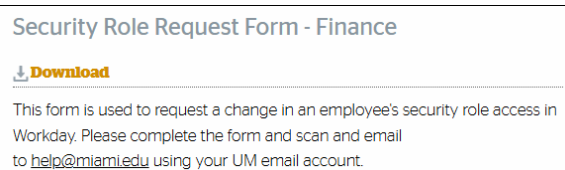
02. Accounts Payable Invoice Submission Email Process (Academy, MSOM, UHC Corp & UMMG)

03. Accounts Payable Invoice Submission Form (UM Hospital, UMHC & ABLEH)

04. New Supplier Request for Purchase Order

05. Workday Security Forms

6. Scroll down and select the **Security Role Request Form - Finance**.



Security Role Request Form - Finance

Download

This form is used to request a change in an employee's security role access in Workday. Please complete the form and scan and email to [help@miami.edu](mailto:help@miami.edu) using your UM email account.

7. Download and complete the form and email it to [Help@miami.edu](mailto:Help@miami.edu)

**For Assistance:** [help@miami.edu](mailto:help@miami.edu)

## View Employees with Access

To find employees with access and request a change order, use the following steps:

1. Open the PO, scroll down to the line items, and select the Cost Center number.

### Service Lines

2 items

Program	Gift	Project	*Cost Center
PG00#### Dept Name			CC00### Cost Center Name

2. Select the *Roles* tab.

Members Details **Roles** Security Groups

3. For a PO, the employee(s) listed under Department Procurement Data Entry Specialist and *Cost Center Manager* can initiate a change order



Assignable Role	Assigned To
Department Procurement Data Entry Specialist	Sebastian Ibis
	Sally Ibis
	Sam Ibis

4. Contact the listed employee(s) to request a change order.

**Tip:** Provide the PO number and the specific change(s). E.g., “For PO-0000####, please increase the dollar amount of line 2 by \$100.”

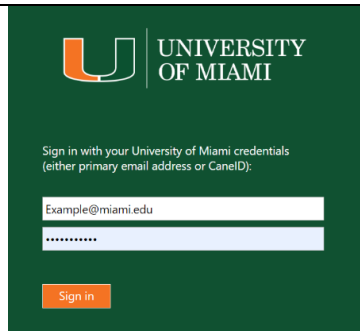
## Initiating a Change Order

Use the following steps to being initiating a change order.

1. Log in to Workday.

[workday.miami.edu](https://workday.miami.edu)

2. Enter your UM credentials.



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Sign in with your University of Miami credentials (either primary email address or CaneID).

Example@miami.edu

.....

Sign in

3. Complete the Microsoft Authenticator Multi-factor Authentication (MFA).



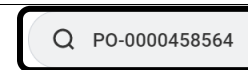
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For security reasons, we require additional information to verify your account.

Open your Microsoft Authenticator app and tap the number you see below to sign in.

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4. [Search](#) for the PO.



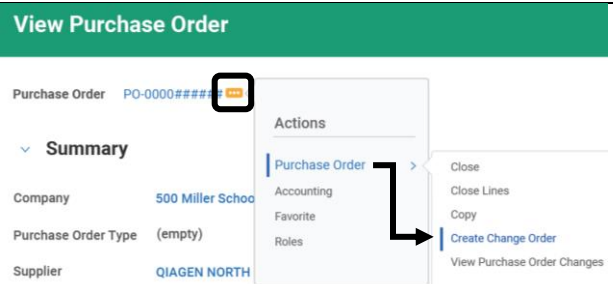
Q PO-0000458564

### Procurement

[PO-0000458564](#)

Purchase Order

5. Initiate the change order:
  - a. Select the **Related Actions** button. (three dots)
  - b. From the *Actions* menu, hover over *Purchase Order*.
  - c. Select **Create Change Order**.



View Purchase Order

Purchase Order PO-0000####

Summary

Company 500 Miller School

Purchase Order Type (empty)

Supplier QIAGEN NORTH

Actions

- Purchase Order
- Accounting
- Favorite
- Roles

Close

Close Lines

Copy

Create Change Order

View Purchase Order Changes

6. As POs have 30+ fields, help approvers quickly identify the change order reason, in the *Comments* field. Start with the version number and date. Then state the field(s) and/or attachment(s) being changed, followed by any additional comments.



### Change Order Reason


Comments

Version 2, 4/1/25, Increasing dollar amount to \$300 for remaining fiscal year invoices.



7. The information in the *Summary*, *Terms and Taxes*, and *Contact Information* sections must remain unchanged to prevent an error or processing issues.

**Exception:** The employee initiating the change order is required to input the *Memo*. Also the *Internal Memo* may be edited. For example, the change order initiator is required to complete the *Internal Memo*. Whereas, only Accounts Payable representatives should edit *Freight Amount* and *Other Changes*.

**Memo**  Version 2, 4/1/25, Increasing dollar amount to \$300 for remaining fiscal year invoices.   
Version 1, 6/1/25, Worktag changed to...

**Internal Memo** Increase in participants for Dr. Ibis study #... 

8. Copy and paste information from the *Comments* field into the *Memo* field. Prior *Memo* information can remain as a history of the changes.

**Memo**  Version 2, 4/1/25, Increasing dollar amount to \$300 for remaining fiscal year invoices.   
Version 1, 6/1/25, Worktag changed to...

9. *Internal Memo* is optional and can only be viewed by UM employees.

**Internal Memo** Increase in participants for Dr. Ibis study #...

10. After completing the steps above, depending on the scenario, follow the corresponding demo(s). Then continue to step 10:

- [Extend the End Date](#)
- [Attachments](#)
- [Driver Worktag](#)
- [Dollar Amount](#)
- [Goods to Services](#)
- [Contracts](#)


**For Assistance:** [UHealth](#), [Academy](#), or [MSOM](#)

## Extend the End Date

To extend the end date, update the field. Consulting agreements may exist beyond a single fiscal year. Whereas, standing purchase orders (SPOs) generally only exist for a single fiscal year. (e.g., *Start Date* = 6/1/24 and *End Date* = 5/31/25)

**Exception:** Airgas SPOs may be extended multiple fiscal years.

**For Assistance:** [UHealth](#), [Academy](#), [MSOM](#).

Due Date	Start Date	End Date
	04/01/2024	06/30/2024

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## Attachments



It may or may not be necessary to add or remove attachments. If needed, review the steps below.

For tracking purposes, previous attachments may remain. (*Optional*)



Goods Lines   Service Lines   Tax   Retention Terms   Prepaid Details   **Attachments**

**Removing Attachments** - Select the attachment and click the trash icon.

**Attachments**

	<b>Quote# 123456 Supplier Name, Date</b> Uploaded by Sebastian Ibis 5 months ago	
	Attachment Category (empty)	
	External <input type="checkbox"/>	
	Comment Additional Research Participants	

	<b>Quote# 012345 Supplier Name, Date</b> Uploaded by Sebastian Ibis 3 months ago	
-------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------

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**Adding Attachments** - Select the *Upload* button, choose the attachment, and select *OK*.

**Upload**

**Tip:** *Comments* can help approvers quickly differentiate between attachments. E.g., “Original Quote”, “Quote Updated 6/1/24” “Event Invitation”, or “Updated Attendees List 8/1/24”.

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## Driver Worktag

Driver Worktags can be updated on lines that have not been paid or have remaining funds.

**For Assistance:** [UHealth](#), [Academy](#), [MSOM](#).

**For Journal Entry Assistance:** Paid line item, contact [help@miami.edu](mailto:help@miami.edu) to process a Journal Entry.

**Unpaid / Remaining Funds** – Scroll down to the line item(s) and adjust the Program, Grant, Gift, or Project.

## Partially Paid

It is necessary to have two (2) line items, one for the original Driver Worktag, and a new line for the new Driver Worktag.

1. **Original Line Item** – To remove excess funds, change the *Ordered* amount to equal the *Invoiced* amount.

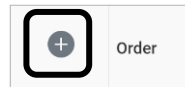
Before	After
Amount	Amount
Ordered 2,500.00	Ordered 1,000.00
Received 0.00	Received 0.00
Invoiced 1,000.00	Invoiced 1,000.00

2. **Add a Line Item** - Select the "+". Complete the fields to match the original line item and select the new *Program*, *Grant*, *Gift*, or *Project* Worktag.

**Calculation Tip:** From the *Amount* column, find the *Ordered* field, and type the anticipated amount to be invoiced (current + future invoices).

### Services

0 items



Amount
Ordered 1,500.00
Received 0.00
Invoiced 0.00



## Company

**Line Item Changes** – At least one line item *Company* must match the header *Company*. If there is no match, create a new requisition.

Goods Order Line	Line	Company	Item Descr
🔍	1	200 Academy	NETGEAR Plus Switc

**Important:** The header *Company* cannot be changed. Instead, create a new req.

## Allowable Company Combinations on a Single Req

- 200 Academy
- 500 MSOM
- 200 Academy & 500 MSOM
- 3XX Any UHealth combination (e.g. 305 UHCORP, 310 UMMG, 320 ABLEH, 330 UMHC, & 340 UMH)

## Dollar Amount

To calculate the total dollar amount, the calculation should include all invoiced, pending, and future invoices for the line item. See example calculation below.

**For Invoiced Amount Assistance:** [Accounts Payable](#)

**For Change Order Assistance:** [UHealth](#), [Academy](#), or [MSOM](#)

## Goods to Services

When processing additional invoices for a single line item, Accounts Payable may contact the req creator, requesting the line item(s) to be changed from a Goods Line to a Service Line to process payment.

**For Assistance:** [UHealth](#), [Academy](#), or [MSOM](#).

1. From the *Service Lines* tab, click the “+”. A blank line item will appear. Complete all fields for the item being moved to the *Service Lines*.

Goods Lines	Service Lines	Version History	Process History		
Service Lines 2 Items					
+	Cancel PO Line	Company	Line	Description	Spend Category
-		500 Miller School of Medicine	1	Annual Maintenance	SC08811 Other Outside Serv

2. From the *Goods Line* tab, adjust the *Ordered* amount to equal the invoiced amount.

Amount
Ordered
100.00
Received
0.00
Invoiced
100.00

## Contracts

For assistance, contact the Buyer that approved the original requisition or your procurement team [UHealth](#), [MSOM](#), [Academy](#)

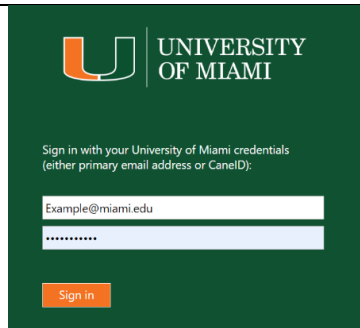
3. **Submit** the Change Order.  
Complete the change order process by tracking approvals. Re-submit the invoice to Accounts Payable and send the updated PO to the supplier, if needed.

## Tracking Approvals

Track all approvals to ensure the process is completed and invoices can be paid.

1. Log in to Workday. [workday.miami.edu](https://workday.miami.edu)

2. Enter your UM credentials.



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Sign in with your University of Miami credentials (either primary email address or CaneID).

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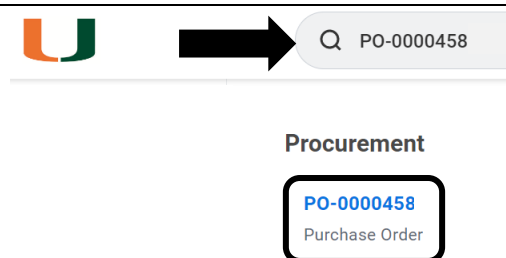
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4. Search for the PO.



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PO-0000458

Procurement

PO-0000458  
Purchase Order

5. Check the *Status*.  
The PO and change order *Status* appear on different screens. To view the change order, scroll down and select the **Version History** tab.

Service Lines   **Version History**   Process History   Attachments   Print

**Fully Approved** - If a change order was fully approved, it will appear on the left side under *Prior Versions*.

**In Progress** - If a change order was submitted and is not fully approved, the *Pending Changes* section will list the status *In Progress*. To view the current approver(s), select the magnifying glass.

**Important:** To process payment, the change order must be fully approved, and the invoice resubmitted to the AP rep that initially reached out to the department.

**AP Assistance:** [200 Academy](#), [500 MSOM](#), [305 UHCORP](#), and [310 UMMG](#) or [320 ABLEH](#), [330 UHC](#), and [340 UMH](#)

Purchase Order	Change Date	Total Amount
No items available.		

Change Order	Version	Created On	Change Order Status	Total Amount
	1	09/07/2022	In Progress	2,577.49

6. On the *Process History* tab, pending approvers will appear. Additional approver names may appear by selecting the number in the *All Persons* column.

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons
Change Order	Review Change	Awaiting Action		09/29/2022	Jeaneth Jaramillo (Purchase Order Buyer)	1

## Cancelling a Change Order

After the appropriate Supply Chain representative cancels the change order, a new change order can be initiated, or the PO can be closed.

### For Assistance:

- UHealth: [Jose Gutierrez](#) / [Julia Scardigno](#)
- Academy/MSOM: [Ignacio Calle](#) / [Ken Pallais](#)

## Resubmitting Invoices

To process payment, the change order must be fully approved, and the invoice resubmitted to the AP rep that initially reached out to the department.

**AP Assistance:** [200 Academy](#), [500 MSOM](#), [305 UHCORP](#), and [310 UMMG](#) or [320 ABLEH](#), [330 UHC](#), and [340 UMH](#)

## Resending a PO to the Supplier

To re-send a PO to the supplier, contact your procurement team.

**Assistance:** [UHealth](#), [MSOM](#), [Academy](#)