Purchase Order Revision Narrative

Purpose

The purpose of the Purchase Order Revision (POR) to revise an existing Purchase Order. The below table provides a guide for when a POR should be used:

The PM must understand which Change Order Process to use depending upon Project Type, Vendor, and Contract Type. The below matrix can be used as a reference:

Project Type	Vendor	Contract Type	e-Builder Process
Major	CM	CM at Risk	06 – Potential Change Order
Major	AE	Agreement between Owner and Professional	07AS – Additional Service
Major	TC	Purchase Order	07C – Purchase Order Revision
Minor	CM/GC	Purchase Order	07C – Purchase Order Revision
Minor	AE	Purchase Order	07C – Purchase Order Revision
Minor	TC	Purchase Order	07C – Purchase Order Revision

CM – Construction Manager AE – Architect Engineer TC – Trade Contractor GC – General Contractor

Initiator

The vendor to which the existing Purchase Order is made out to initiates the Purchase Order Revision process.

Key Terms

Purchase Order	A Purchase Order (PO) is a binding contract between UCF and the Vendor. POs include the services/materials being purchased, the scope of service, payment terms, invoicing instructions and the purchase order number.
Add Service	Additional service performed by an AE, not included in the initial scope of work, and also not considered a Basic Service

Summary

During the Project Process Flow of Minor Projects, a number of events which trigger the need for a Purchase Order Revision. Common reasons are listed below:

- Scope of work assigned to the vendor is increased or decreased
- Existing scope required more or less funding
- Time associated with the in-scope work needs to be increased or decreased

Requirements

- Add Service or Contractor Proposal for the change request
- Explanation of why the proposed change request was not included in the original contract
- Justification of why the change is needed
- Description of the impact the change will have on the project
- The specific commitment impacted by the change
- Details of what is covered by this addition or deletion of work

Pre-requisites

- Issued Purchase Order
- Agreement from PM that POR can be initiated

Key Steps

Start: Vendor initiates the 07C – Purchase Order Revision Process, provides information, and submits process

Step1: Routing Workflow – the e-Builder system applies three logical tests to determine CA routing

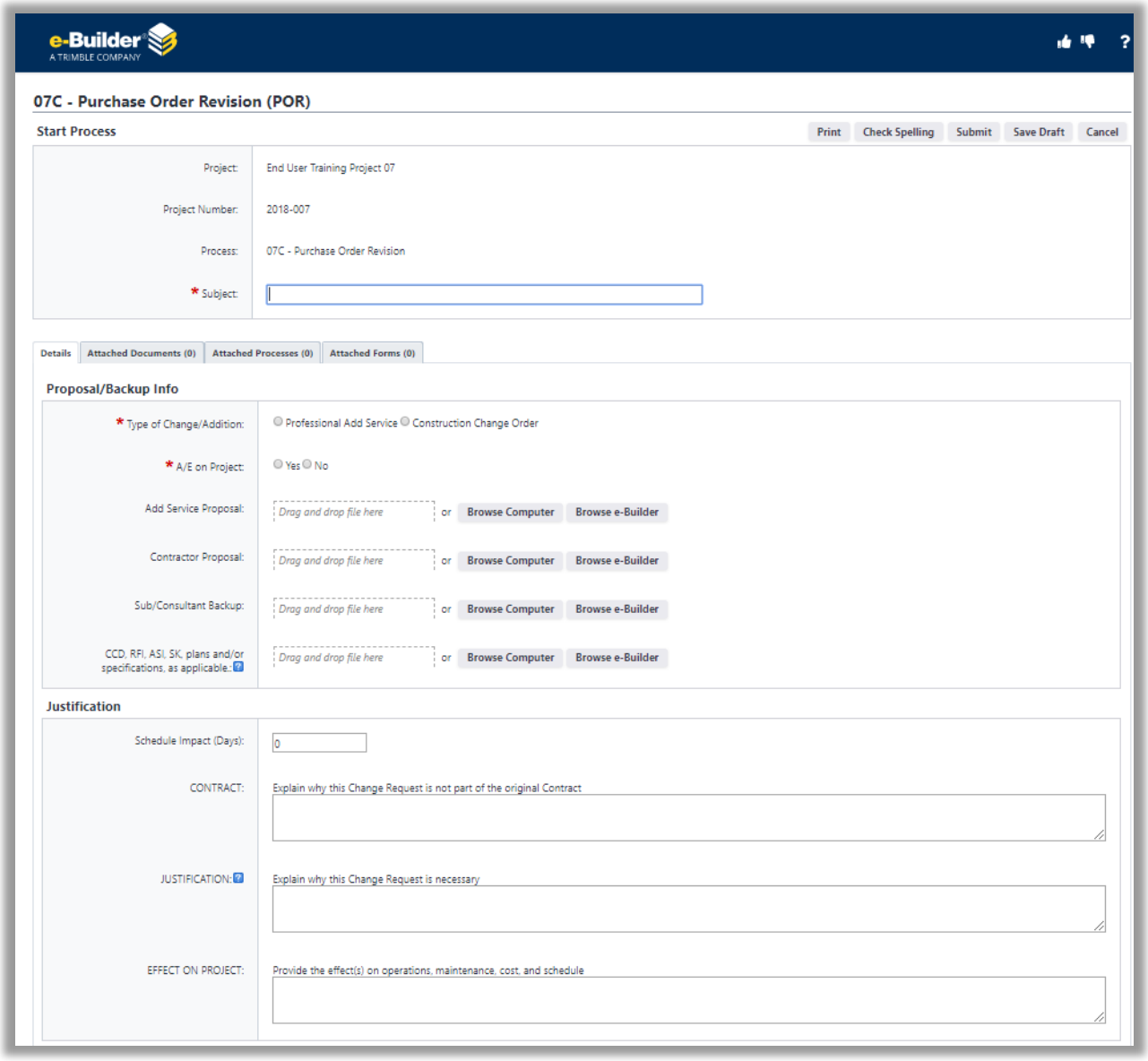
Step2: FSBO Review and Requisition Creation

Step3: UCF Procurement Review and PO Creation

Step4: Funds Validation

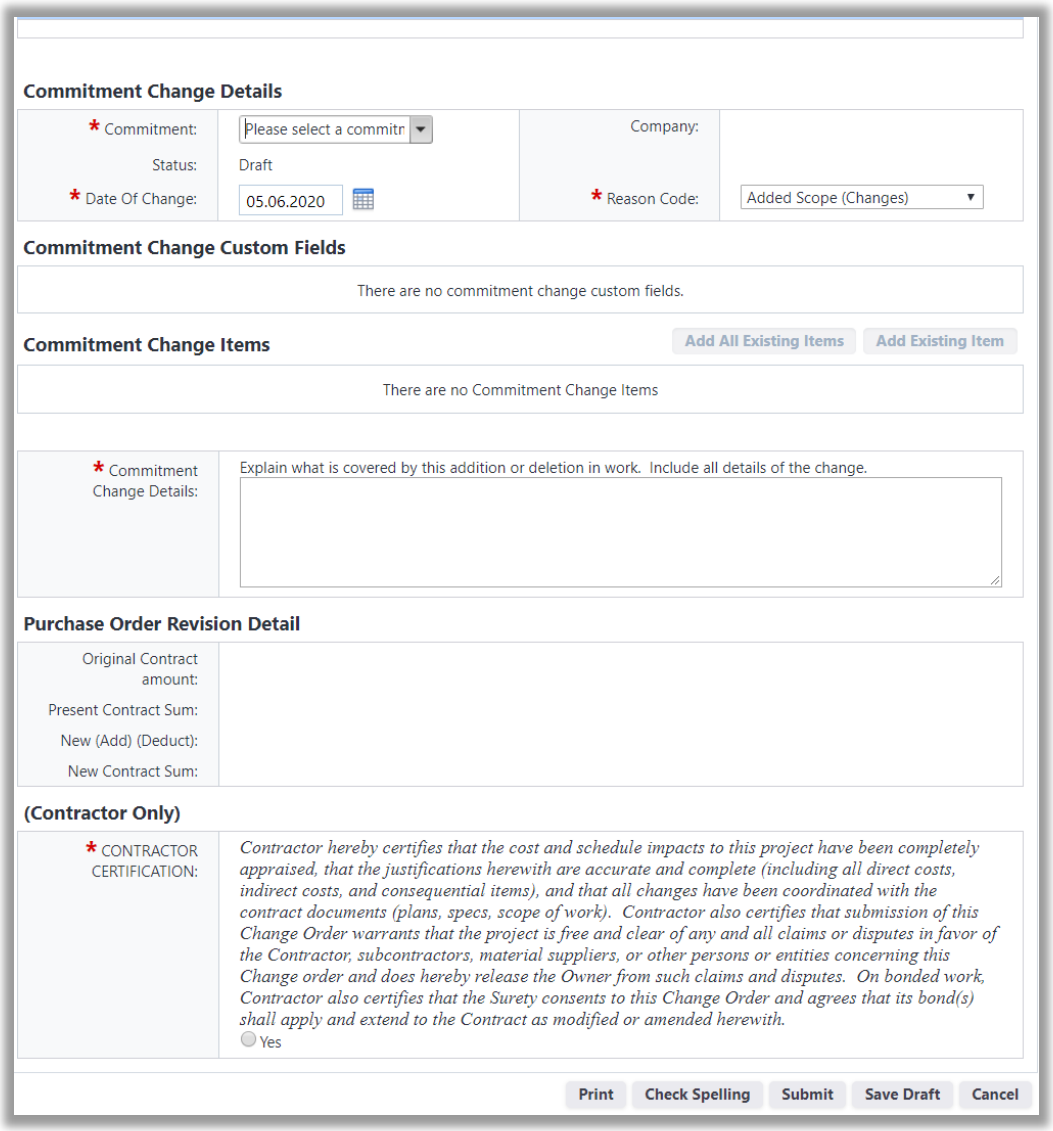
Step 5: UCF Procurement Sends PO Information to Contractor

Finish: FPC PM follows up with Contractor to ensure PO Information was received



Subject field	
Type of Change/Addition	Select the appropriate radio button to indicate if the Change Request applies to the Professional or Contractor.
A/E on Project	Select the appropriate radio button to indicate if there is an Architect or Engineer on the project.
Add Service Proposal	If applicable, select the **Browse Computer** button and attach the Additional Service Proposal from the A/E.
Contractor Proposal	If applicable, select the **Browse Computer** button and attach the Contractor Proposal from the Contractor.
Sub/Consultant Backup	If applicable, select the **Browse Computer** button and attach the backup documentation from the Sub/Consultant.
CCD, RFI, ASI, SK, plans and/or specifications, as applicable	If applicable, select the **Browse Computer** button and attach any relevant plans and/or specifications.

Schedule Impact (Days)	Enter the number of days the project schedule will be impacted
CONTRACT	Enter an explanation of why this Change Request is not part of the original Contract.
JUSTIFICATION	Enter a justification of why this Change Request is necessary.
EFFECT ON PROJECT	Enter information of the effects on Operations, Maintenance, Cost, and Schedule

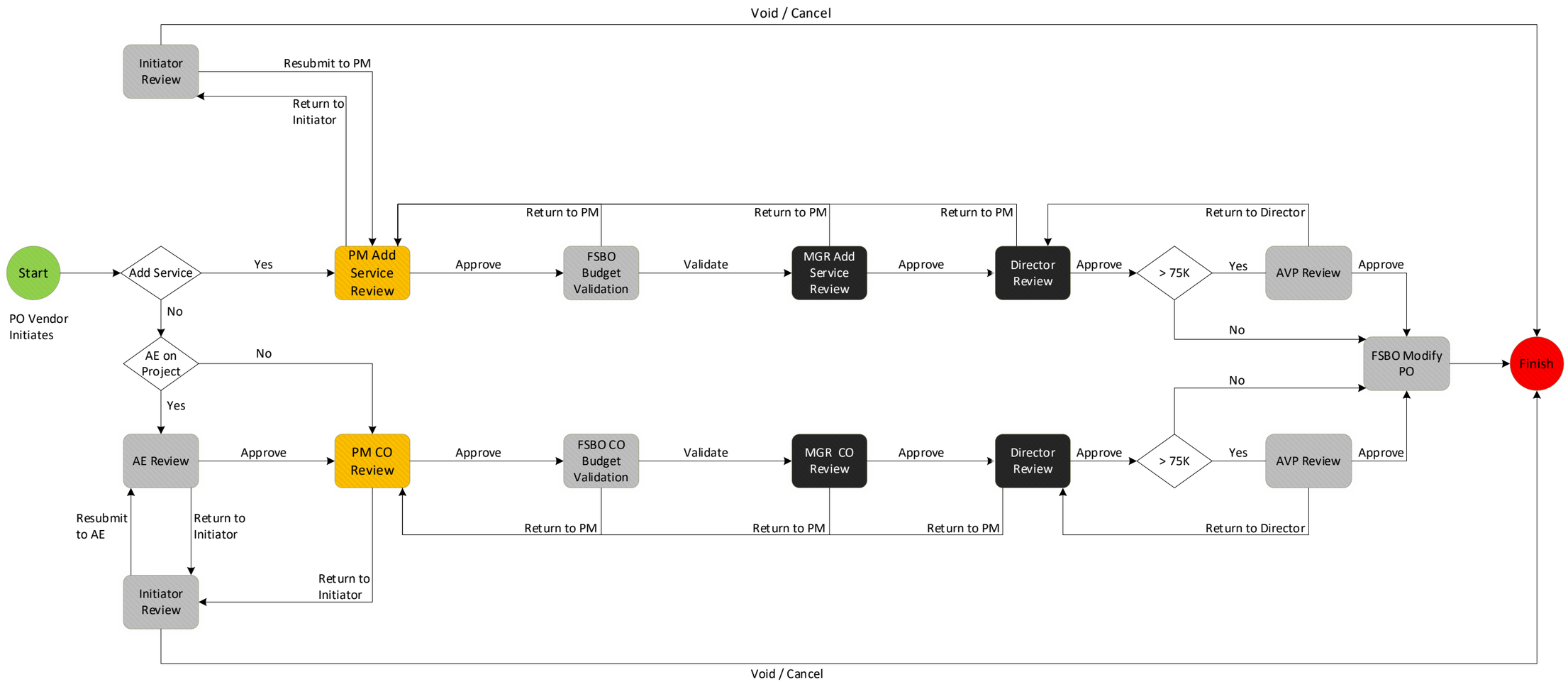


Commitment dropdown	Select the appropriate commitment
Date Of Change field	Input the appropriate date
Reason Code dropdown	Select the appropriate Reason Code

Commitment Change Details text field	Enter information associated with the change
Contractor Certification checkbox (contractor only)	Vendor selects the checkbox to certify the POR

- Select the **Submit** button

07C – Purchase Order Revision (POR)



MGR – Manager, Facilities Planning
AVP – Associate Vice President
Director – Director, Facilities Planning
CO – Change Order
PO – Purchase Order
PO Vendor – Vendor to whom the PO is issued
FSBO – Facilities and Safety Business Office
PM – Project Manager
AE – Architect Engineer

LEGEND