

Change Order - Updating Chart of Accounts

This document is a quick reference guide for users who need to create a change order to update the chart of accounts in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO website: <https://spo.az.gov/>.

Once a PO has been created, users can create change orders to make necessary changes to an original order. Users can update the Chart of Accounts (COA) by removing the allocation % or amount on their original budget line and adding a new allocation line on their new requisition. Once complete, the requisition will only go through the Finance Approver to validate the proper use of budget information.

If a line item has been paid (partial or full) the budget information can **NOT** be modified. To make a quantity change refer to the Change Order - Removing Items QRG.

Updating Chart of Accounts

1. Navigate to the **Procurement** dropdown, and click **Browse Orders**.
2. Search for the order you would like to conduct a change order on.
3. Click the **Pencil** icon to open the order.
4. To begin a change order, click the **Change Order** button at the top of the page.

Change Order

5. On the new requisition created, navigate to the **Items** section.
6. Click the **Pencil** icon for the item you would like to update the budget information for.

#	Ref.	Short Description	Supplier	Total Ordered Quantity	UOM	Price
242726-1	CTR049468-2	Accounting Manager	(Brennan and Dale LLC) Brennan and Dale LLC	10.0000	Hour	95.000000
242726-2	CTR049468-1	Accounting Employee	(Brennan and Dale LLC) Brennan and Dale LLC	10.0000	Hour	50.000000

7. On the popup, navigate and expand the **Budget** section.

> Budget Information

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- In the Allocations section, enter '0' in the % or Amount column for the budget line(s) you will not be moving forward with.

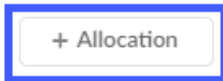
Allocations

+ Allocation Filled In Remaining To Allocate: 0.0000 %
 Percentage Amount

Copy Line(s)

Tax	Allocation ID	%	Pretax Amount (USD)*	Organization	Agency	Fiscal Year	Budget Fiscal Year*
<input type="checkbox"/>	1	0 %	500,000...	Community Corrections (Training)	Arizona Department of Corrections	2021	2021

- To add a new budget line, click the +Allocation button.



- Enter '100' in the % column or dollar amount in the Amount column for your new budget line.
- Enter your updated Chart of Accounts.

Tax	Allocation ID	%	Pretax Amount (USD)*	Organization	Agency	Fiscal Year	Budget Fiscal Year*
<input type="checkbox"/>		100 %		Community Corrections (Training)	Arizona Department of Corrections	2021	2021
<input type="checkbox"/>	1	0 %	500,000...	Community Corrections (Training)	Arizona Department of Corrections	2021	2021

- Click Save & Close.



- Once complete making changes to your requisitions, click Submit Requisition.



Note: If a line item has been paid (partial or full) the budget information can **NOT** be modified. For additional information refer to the [Change Order Matrix](#).

Note: **DO NOT RESET ALLOCATIONS** on a change order, If users reset allocations they will break the PO/AFIS connection. If you see a dialog box asking you to reset allocations, click the 'Cancel' button. Your change order will still process correctly.