

From: Research Administration Network
Sent: Monday, July 10, 2017 11:09 AM
To: 'RESEARCH_ADMINISTRATION_NETWORK@LISTS.MCGILL.CA' <RESEARCH_ADMINISTRATION_NETWORK@LISTS.MCGILL.CA>
Subject: FW: New Processes Applicable to Change Orders - effective July 3, 2017 and July 17, 2017 - ANNOUNCEMENT

This message is sent out on behalf of Cristiane Tinmouth, Associate Vice-Principal, Financial Services

Dear Colleagues,

In order to meet Tri-Agency requirements, eliminate manual approval processes and duplication of efforts, as well as provide Fund Financial Managers/Principal Investigators (FFM/PI) full visibility on Change Orders, the following processes respective to Change Orders will be implemented:

- Effective July 3, 2017, all Change Orders (Purchase Order changes) will be sent for electronic approval to the FFM/PI or their delegate. The approval process will replicate the current approval workflows that exist for Purchase Requisitions in MMP.
- Effective July 17, 2017 all invoices received by Accounts Payable where a discrepancy exists between the Invoice and the Purchase Order will be returned to the Purchase Order requestor and a Change Order will need to be submitted. Examples of discrepancies are: adding or removing products/services, changing quantities ordered, increasing pricing of products/services or changing fund/grant distribution.

As is currently in place for Purchase Requisitions, the FFM/PI/delegate will approve Change Orders in Minerva Finance Administration Menu – Approve Document. Change Orders will be easily identifiable as the document number will be a PO number (POXXXXXX). Details of the change will be provided in the “Document Text” (Fig.2) section of the PO details (viewable by clicking the PO number – Fig.1):

Fig.1

Y	PO		2		ARACAN1	1,429.10	DOC	P0647828	History	Approve	Disapprove
Y	PO		1		ARACAN1	337.69	DOC	P0653316	History	Approve	Disapprove
Y	PO		1		SBOYD2	1,771.72	DOC	P0653813	History	Approve	Disapprove

Fig.2

Document Text	Change order to increase cost to \$1540.96
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If you need any further information, please do not hesitate to contact Procurement Services at feedback.purchasing@mcgill.ca.

Thank you

Cris

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