Encumbering Funds for Contract Renewals

Per DOAS GPM Chapter 7, Section 7.6.2:

This Job Aid will simplify the process of encumbering funds for contract renewals by creating a multi-year contract PO.

Note: Institutions that do NOT use eProcurement should refer to the section titled "<u>What to do if</u> <u>my institution does not use eProcurement</u>." Institutions that use eProcurement should follow the steps below.

Steps for adding a Renewal to an existing PO

C.

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Note: Pri

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d. You will be prompted to create a change order. **Click OK** to copy the requisition as new lines on the Purchase Order.

- e. On the PO, locate the appropriate PO line for this year and click the **Schedule** icon, then the **Distributions** icon.
- f. Verify that all information is accurate. Pay attention to the **Budget Date** on and **Bud Ref** on the Chartfields2 tab which defines the budget year these funds will be encumbered.
- g. After all information is verified, click **OK** then click **Return to Main Page**.
- h. Click Save to save your changes to the Purchase Order.
- i. At this point, the Changed Purchase Order can be Approved, Budget Checked, and Dispatched.

Remember, the purchase order will not budget e eCTs du533 0 Td(,)Tfc 0.004 Tw 0.217 t(e)Tf.5 0 Td(r)Tf.34 Tw 0.522 if.

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