

Returning a Purchase Requisition

When a purchase requisition has been entered into the PeopleSoft system and it is discovered that the dollar amount is less than what is needed and/or the description needs to be changed (and the req has not been awarded), the procedure to revise the purchase req is as follows:

Requester must:

- Notify via email (and follow up with a phone call) the LCLS Purchasing Group (David McGiven or Scott Zadel) that there is a substantial change to be made to the purchase req.
 - Why it is being returned
 - New total dollar amount, description, etc.

Purchasing Group to:

- Send email request BSD to have the Purchasing Requisition returned to Pending Status
- Via email, notify Operator (Darlene Ford) and Finance (Wendy Sisson) that req is being returned. This communication should include:
 - Why it is being returned
 - New total dollar amount

Requestor is then responsible for:

- Printing out a copy of the original **BIS Requisition**
- Manually changing the dollar amount or description on the hard copy
- Obtaining the necessary approval signatures (the approvers will be listed on the BIS requisition)
- Give the signed updated BIS req to the Operator (Darlene) to use when updating the Purchase Requisition

The purchase req will then be updated in the PeopleSoft System, where the process will continue on as normal.