Correct PO Sales/Use Tax

<table>
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<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
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<tr>
<td>2.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
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<tr>
<td>3.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
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<tr>
<td>4.</td>
<td>Enter the desired information into the <strong>PO ID:</strong> field. Enter a valid value e.g. &quot;2000001250&quot;.</td>
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<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
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<tr>
<td>6.</td>
<td>The <strong>Purchase Order</strong> page is displayed. Click the <strong>Collapse (Ctrl+Y) Menu</strong> button.</td>
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| 7.   | Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.  

**Note:** If the change order icon is not selected the system will notify you later as changes are made that changes are being tracked. Selecting the icon before change are made eliminates warning messages as changes are made.  
Click the **Change Order** button. |
| 8.   | Once the Change Order icon has been selected it will disappear from the purchase order page.  
The next step immediately following is to select the **Finalize Document** icon.  
This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.  
Click the **Finalize Document** button. |
| 9.   | A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes.  
Click the **Yes** button. |
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| **10.** | You are returned to the Purchase Order page. The **Dispatch Method** for the PO should be selected.  
Click the **Dispatch Method** list. |
| | **Print** |
| **11.** | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
1) If the vendor **does not require** PO information to be sent, then select:  
**Print** - the print option for PO Change Orders will not print the PO.  
2) If the vendor **does require** that PO information is sent, then select:  
**Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - “Print or Email PO Change Order” in the UPK under Purchasing or the Quick Reference Guide” for detailed instruction.  
Do no not use the following values:  
**EDX** - not used for PO Change Orders  
**Fax** - not used for PO Change Orders  
**Phone** - not used for PO Change Orders |
| **12.** | Click the **Print** list item. |
| **13.** | The **Schedule** Icon is used to navigate to schedule page for the line where additional change order options are available.  
Click the **Schedule** button. |
| **14.** | The **Schedules** page for the line is displayed. The **Schedule/Use Tax** icon is selected to navigate to the **Sales Use Tax** schedule for the line and to change tax related information.  
Click the **Sched Sales/Use Tax** button. |
| **15.** | The **Sales/Use Tax Information** page is displayed for line 1 of the schedule.  
Change the taxability for the line.  
Click the **Tax Applicability** list. |
<p>| | <strong>Sales Tax Appr</strong> |</p>
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| 16.  | The values displayed are as listed. Refer to your business rules choose from applicable selections that are used at UCB.  
**Direct Pay** - Do not use  
**Item is exempt** - removes taxability  
**Purchaser is Exonerated** - Do Not use  
**Sales Tax Appl** - Applies Sales Tax  
**Use Tax Appl** - Applies Use Tax |
| 17.  | In this example the selection is made to exempt the item from taxability.  
Click the **Item is Exempt** list item. |
| 18.  | Current tax in the example is $16.28. The Calculate SUT is selected to confirm the tax has been removed.  
Click the **Calculate SUT** button. |
| 19.  | The sales tax has been removed for the line.  
Click the **OK** button. |
| 20.  | Click the **Return to Main Page** link. |
| 21.  | The tax amount of $16.28 and total PO amount of $183.28 is still displayed.  
Use the calculate button to reflect the tax exemption change for the PO.  
Click the **Calculate** button. |
| 22.  | Tax has been removed and the new PO Total Amount is **$167.00**.  
Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason.  
Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver.  
Click the **Add Comments** link. |
| 23.  | The **PO Header Comments** page is displayed. The following format should be followed when entering comments.  
**Date/Name/Action and reason**  
The following example is used  
Enter the desired information into the **Active** field. Enter a valid value e.g. "1/7/2011 - Kristen Jensen - Item is not subject to sales/use tax". |
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| 24.  | To check for any spelling errors  
      Click the **Spell Check Comments (Alt+5)** button. |
| 25.  | In this example spell check does not recognize part of the name entered. In this example the recommendation is ignored.  
      Click the **Ignore** button. |
| 26.  | If no additional errors are found click OK.  
      Click the **OK** button. |
| 27.  | Once the comments have been entered in the correct format and detail, the information can be saved.  
      Click the **OK** button. |
| 28.  | The **Purchase Order** page is displayed. Note that once comments have been entered the hyperlink now reads **Edit Comments**.  
      **Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.  
      Click the **Save** button. |
| 29.  | The **Workflow** pop up is displayed when the change order is successfully saved.  
      **Note:** New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester  
      Click the **OK** button. |
| 30.  | The **Purchase Order** page is displayed. Note that the PO Change Order has been assigned a **Change Order of 1**. Indicating that 1 change order has taken place for this PO and the PO Status is now **Pending Approval**. |
| 31.  | This completes the exercise  
      **End of Procedure.** |