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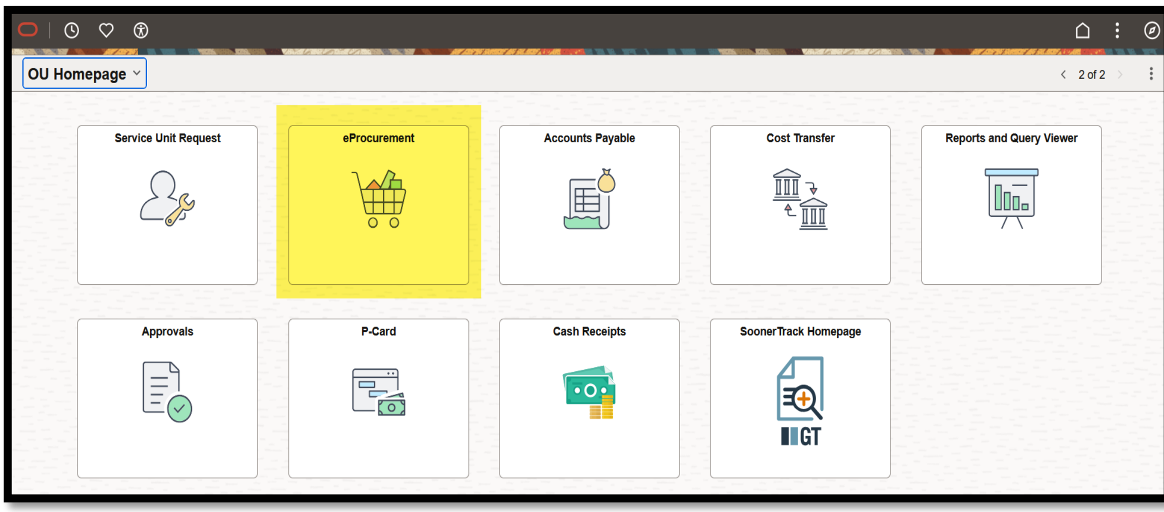
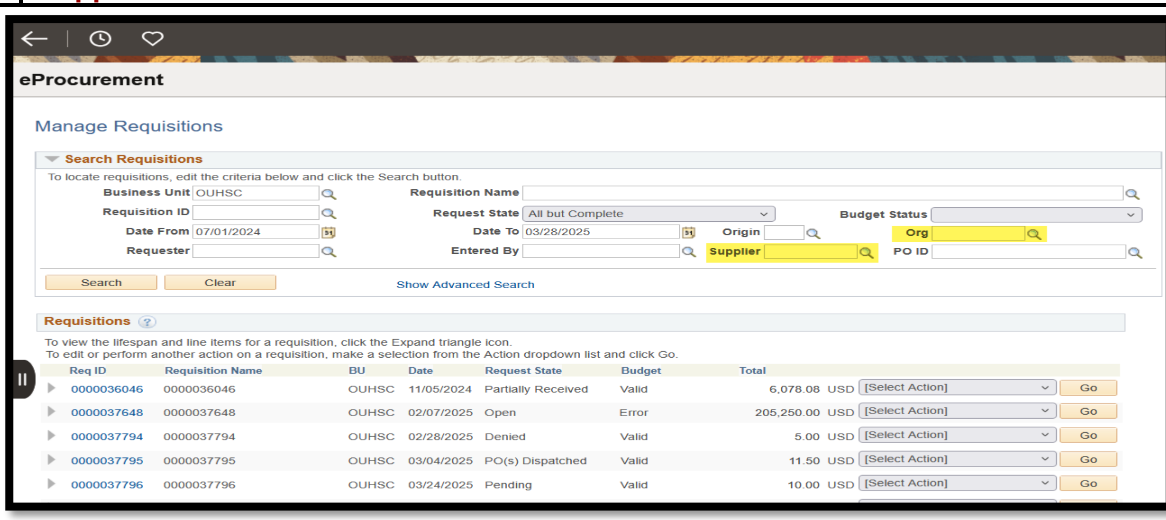
Step	Action
1	The fiscal year runs from July 1st to June 30th. Purchase Orders, unless allocated to CAPTL or SPNSR funds, cannot extend for more than one year and/or past June 30th. Therefore, most recurring services set up on Purchase Orders must be reentered and renewed every fiscal year.
2	New fiscal year requisitions can be entered prior to July 1st. Notifications will be sent to campus when the advanced entry of new fiscal year requisitions can begin in PeopleSoft Financials.
3	Functionality is available to copy requisitions from previous years to facilitate easier entry of the renewal orders. However, if time permits, copying is not recommended, especially for requisitions allocated to SPNSR funds. The copy functionality can inadvertently pick up unused data which may cause change order or closure issues with the order at a later time.
4	To copy an existing requisition, navigate to the **eProcurement tile** from the PeopleSoft Financial homepage and select **Manage Requisitions**.



Step	Action
5	From **Manage Requisitions**, locate the requisition to be copied. Note that you can narrow down your requisitions by using the filters at the top to show those with a particular **Org** or **Supplier**.



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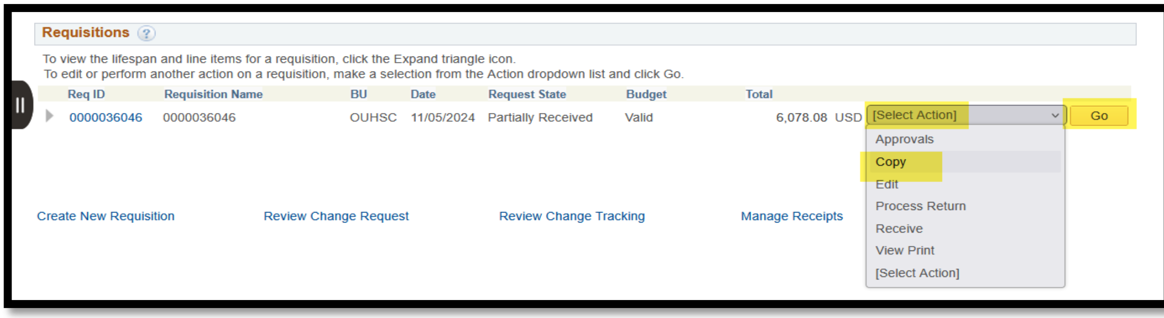
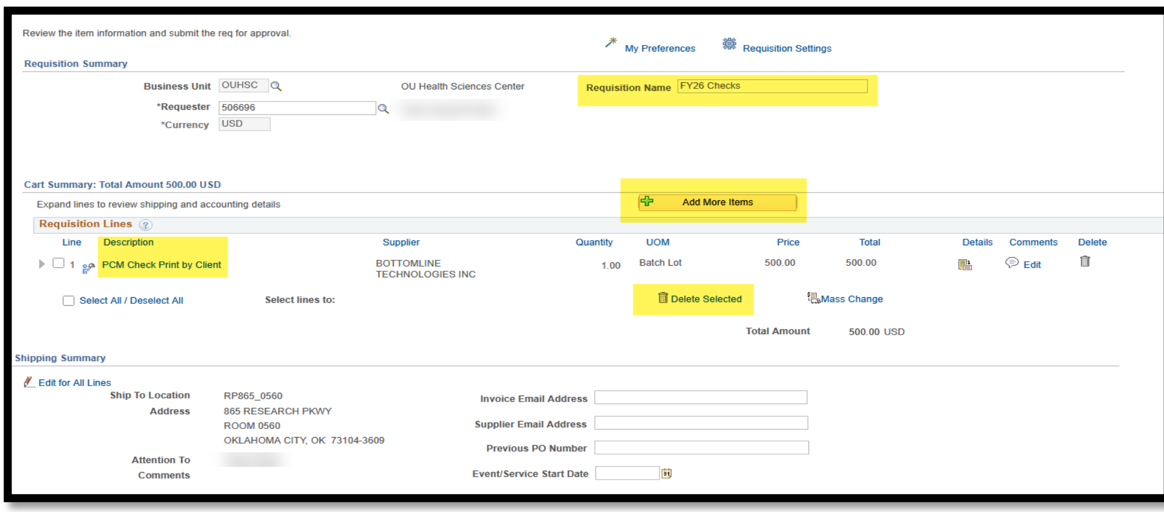
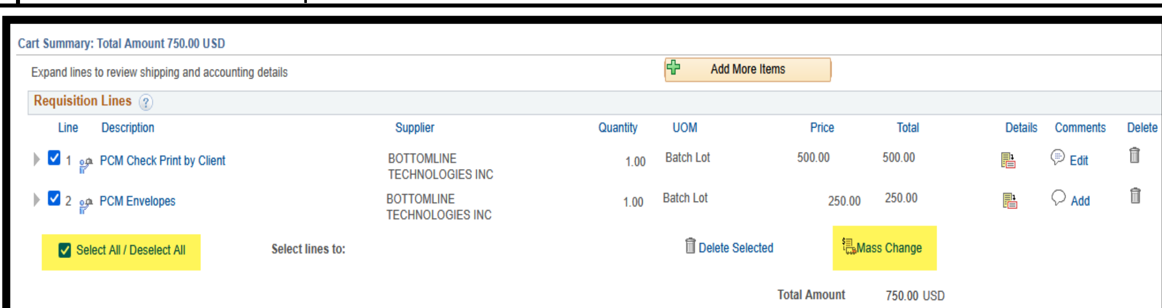
6	From the **Select Action** drop-down menu, choose **Copy** and then click **Go**.
	
7	The requisition details will need to be updated to reflect the agreement for the new fiscal year. Changes may include updating the requisition name, adding lines, deleting lines, or updating quantities and/or amounts. Hint: To update **amounts** or **quantities**, click on the **name of the description** to return to the edit requisition page. More information on this process can be found in the **Change Order** job aid.
	
8	If the accounting information needs to be changed for the new fiscal year, click the **Select All/Deselect All** hyperlink and then the **Mass Change** hyperlink to update the accounting information for all requisition lines.
	
9	To reflect that this requisition is a renewal of a previous requisition, click the **Details** icon on the **first line** of the requisition.

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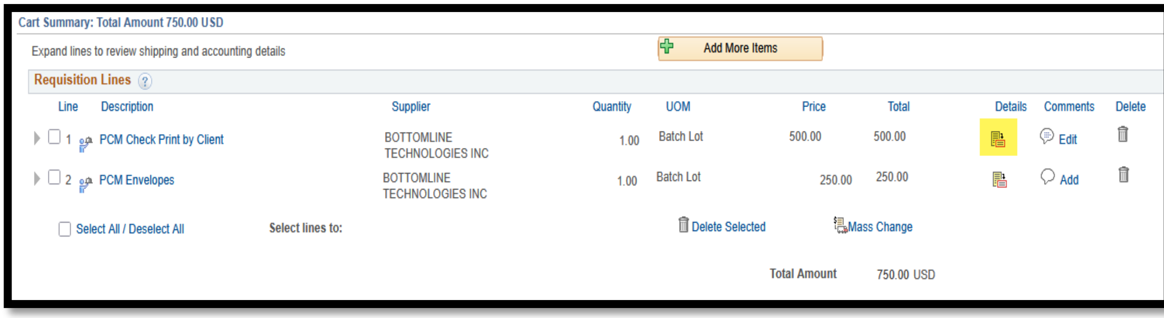
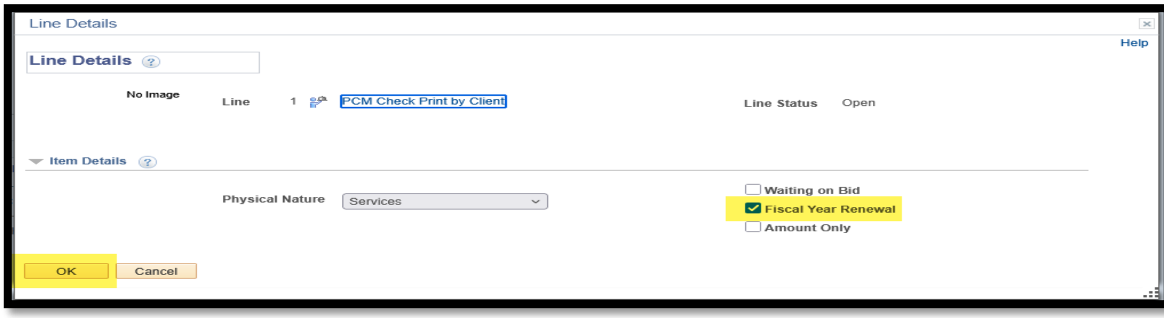
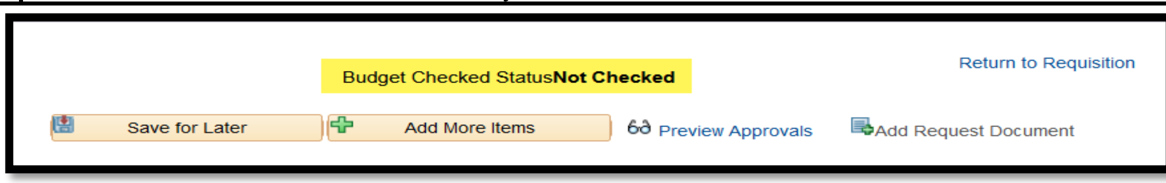


10 The **Line Details** popup will appear and from here, select the **Fiscal Year Renewal** checkbox, and click **OK**.

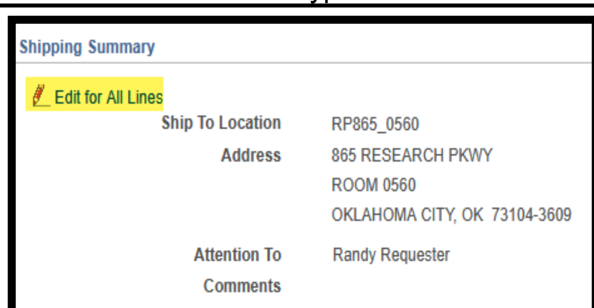


11 Note that the **Fiscal Year Renewal** box only needs to be checked for the first line of the requisition, even if multiple lines exist.

12 Once the renewal box is checked, the options to **budget check** or **submit** the requisition disappear. This is intentional because until the new fiscal year budget is available in PeopleSoft Financials, budget checking will fail for every renewal requisition. This box also indicates for Procurement which requisitions have been submitted for renewal, allowing Procurement to work the new fiscal year orders in advance.



13 Ensure that the **Ship to Location** and **Attention To** name in **Shipping Summary** section is still accurate. Click the **Edit for All Lines** hyperlink if that information needs to be updated.



14 In addition to the **Invoice Email Address** field, which prints on the Purchase Order and notifies the supplier where they are to email invoices to, new for FY26 are additional fields for **Supplier Email Address**, **Previous PO Number**, and **Event/Service Start Date**.

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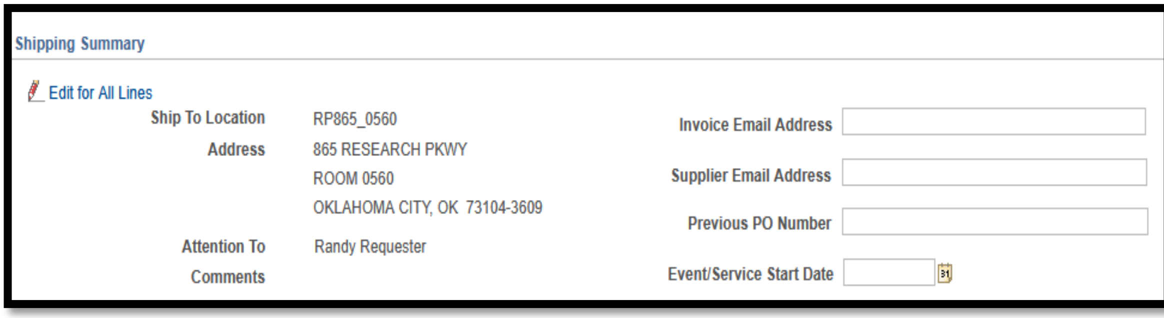
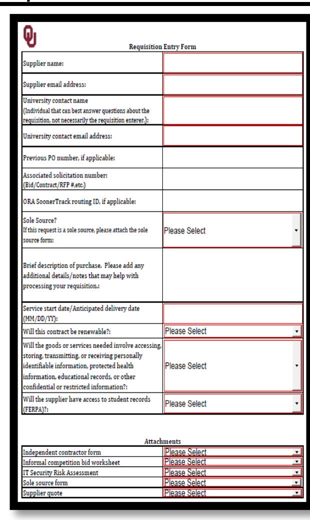


15 **Supplier Email Address** is a required field for regular requisitions, but it is not required for OU Marketplace orders. This is the supplier email address that the Purchase Order will be sent to once the PO process is complete.

16 **Previous PO Number** is an optional field but should be used to indicate the previous Purchase Order number. The field can also be used to list a more relevant RFP number, statewide or cooperative contract number, etc. Referring to a previous order is helpful if all relevant documentation is not attached to the new order or if similar orders need to be distinguished from others.

17 **Event/Service Start Date** is an optional field that can be used to indicate when an event is occurring or when a service agreement is anticipated to begin. The calendar field is replacing the previous Priority Processing dropdown menu and will be used to prioritize orders based on actual start dates rather than perceived urgency. Orders for goods, not services, should leave this field blank.

18 With the addition of these new fields, the [Requisition Entry Form](#) will no longer be a required attachment to process a requisition. Please continue to utilize this form as a checklist for potential details needed for a requisition, but it does not need to be included as a separate attachment for new requisitions.



Requisition Entry Form

Supplier name:	
Supplier email address:	
University contact name (Individual that can best answer questions about the requisition, not necessarily the requisition enterer.):	
University contact email address:	
Previous PO number, if applicable:	
Associated solicitation number: (Bid/Contract/RFP #,etc.)	
ORA SoonerTrack routing ID, if applicable:	
Sole Source? If this request is a sole source, please attach the sole source form:	Please Select
Brief description of purchase. Please add any additional details/notes that may help with processing your requisition.:	
Service start date/Anticipated delivery date (MM/DD/YY):	
Will this contract be renewable?:	Please Select
Will the goods or services needed involve accessing, storing, transmitting, or receiving personally identifiable information, protected health information, educational records, or other confidential or restricted information?:	Please Select
Will the supplier have access to student records (FERPA)?:	Please Select

Attachments

Independent contractor form	Please Select
Informal competition bid worksheet	Please Select
IT Security Risk Assessment	Please Select
Sole source form	Please Select
Supplier quote	Please Select

19 At the bottom of the requisition entry screen there will be two sections for comments. The first comment section is reserved for Procurement, but the **Add Attachments** hyperlink and the **Requester Comments** are sections where the department can add specific information on the order and/or attachments related to the order. This information will be visible to all approvers and Procurement but will not be sent to the supplier.

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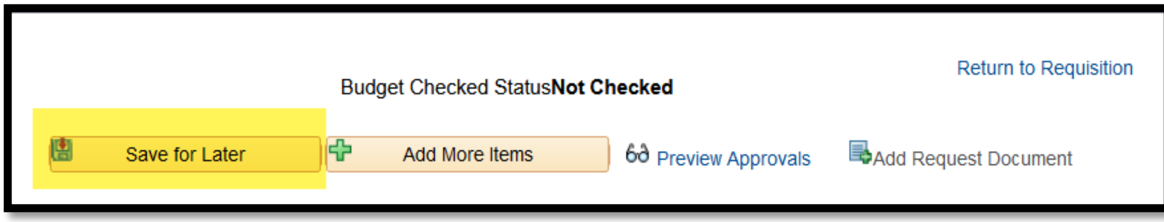
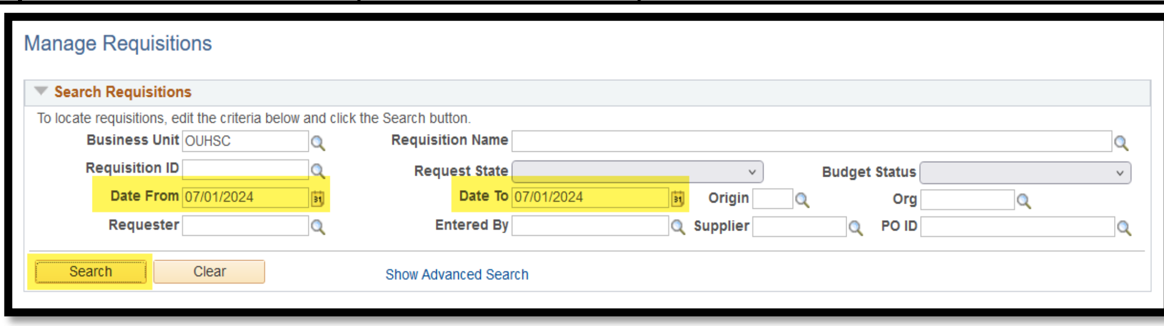
20	Once the requisition entry information is complete, click on **Save for Later** to save your new fiscal year renewal requisition.



21	Procurement will begin to work your fiscal year renewal requisitions when they are in the **Save for Later** status to attempt to have all approvals and details finalized prior to July 1st.
22	If you need to add additional information to your fiscal year renewal requisition, you will need to update the search criteria in **Manage Requisitions**. Update both the default **Date From** and **Date To** fields to July 1st of the new fiscal year and click **Search**.



23	New fiscal year requisitions, not just renewals, can also be entered in advance of July 1st. Follow the same instructions to enter a requisition as you normally would, just ensure that the **Fiscal Year Renewal** box is checked under **Details** on the first requisition line. Please see the job aid on **Requisition Entry** for more information.
24	At the beginning of July, a notification to campus will be sent saying that the new fiscal year is open, and new budgets are available. Once new budgets are available, the renewal requisitions will automatically be budget checked, but they must still be reviewed for any budget errors and submitted for approvals.
25	Budget errors may exist, so it is important that each renewal requisition is reviewed to ensure that the budget is valid and that it is submitted into workflow.
26	To submit the renewal requisitions after the budget is made available, navigate to **Manage Requisitions** and locate the fiscal year renewal requisitions using the instructions noted above. Select **Edit** under the **Select Actions** dropdown menu and click **Go**.

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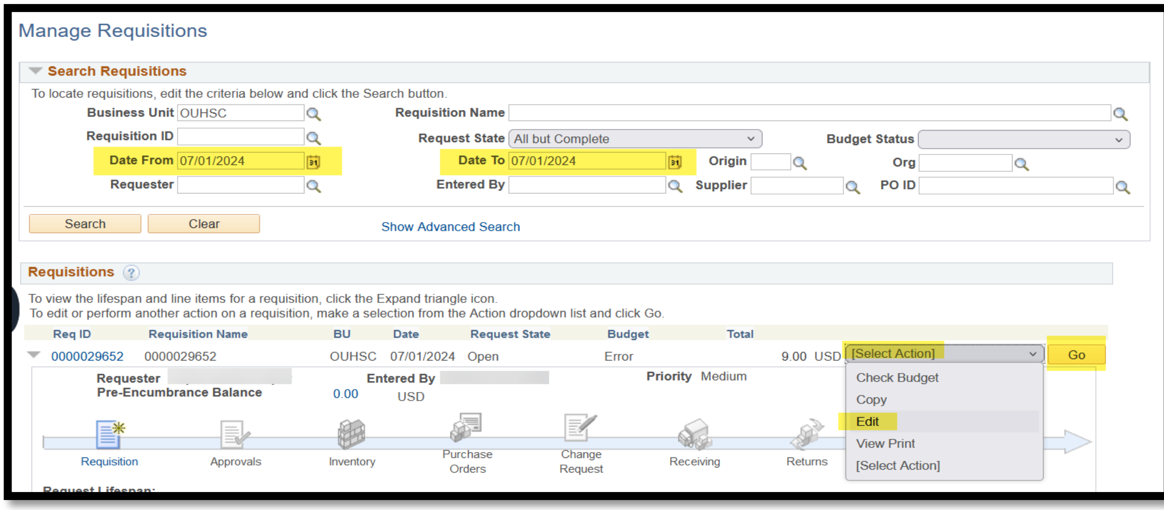
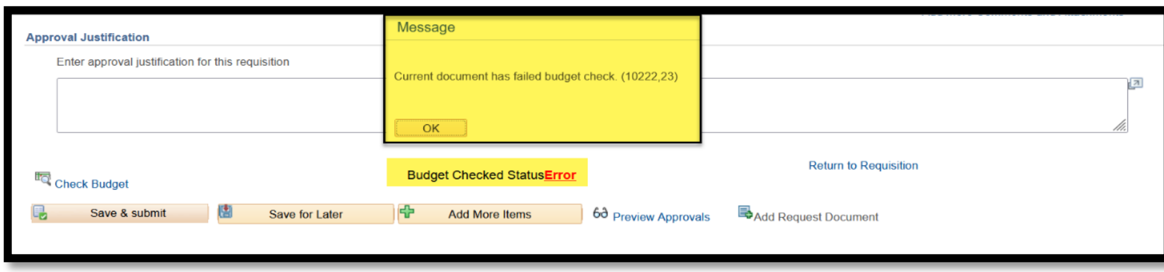
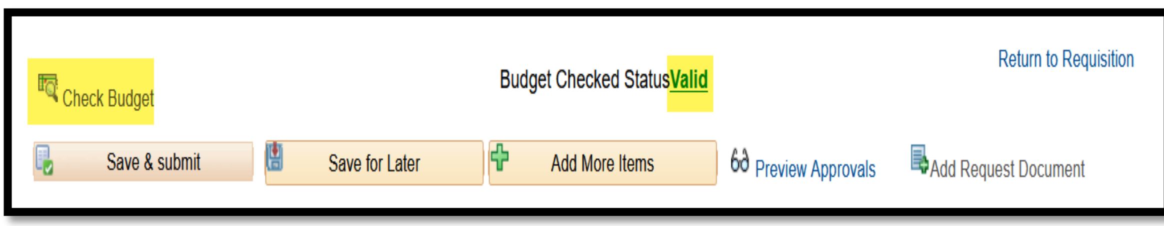


27 If your requisition has a budget error, this **popup message** will appear, and the budget status at the bottom of the screen will show **Error**.



28 The chartfield information will need to be updated to clear up the budget error. Once the update has been made, select the **Check Budget** icon so that the status is reflected as **Valid**.



29 Once the new fiscal year budgets are available and the requisition has a valid budget, the ability to submit your requisition will reappear. Click the **Save & Submit** to submit the requisition for processing.