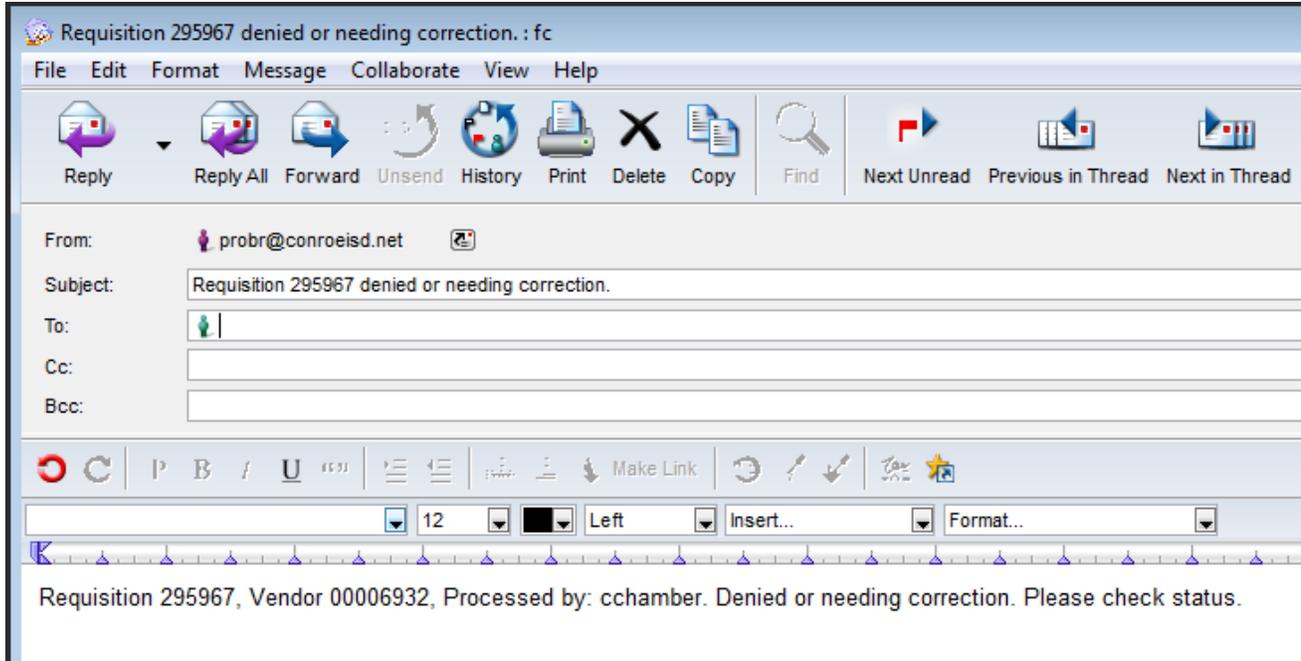


HOW TO VIEW & CORRECT A REQUISITION MARKED NEEDS CORRECTION

Approvers have the ability to mark a requisition as **DENIED** or as **NEEDS CORRECTION** in eFinancePlus. If that action is taken, the person who entered the requisition will get an auto-generated email such as this example:



The approvers listed as “Processed by” may be:

rreeves	Rick Reeves
klaborde	Katy Laborde
jbradley	Janet Bradley
lenockse	Laurie Enocksen
rtitzman	Ryan Titzman
tmclaugh	Terry Mcclaugherty
tross	Terri Ross

*There may be additional names from other departments depending on approval levels.

An overview of the steps involved are:

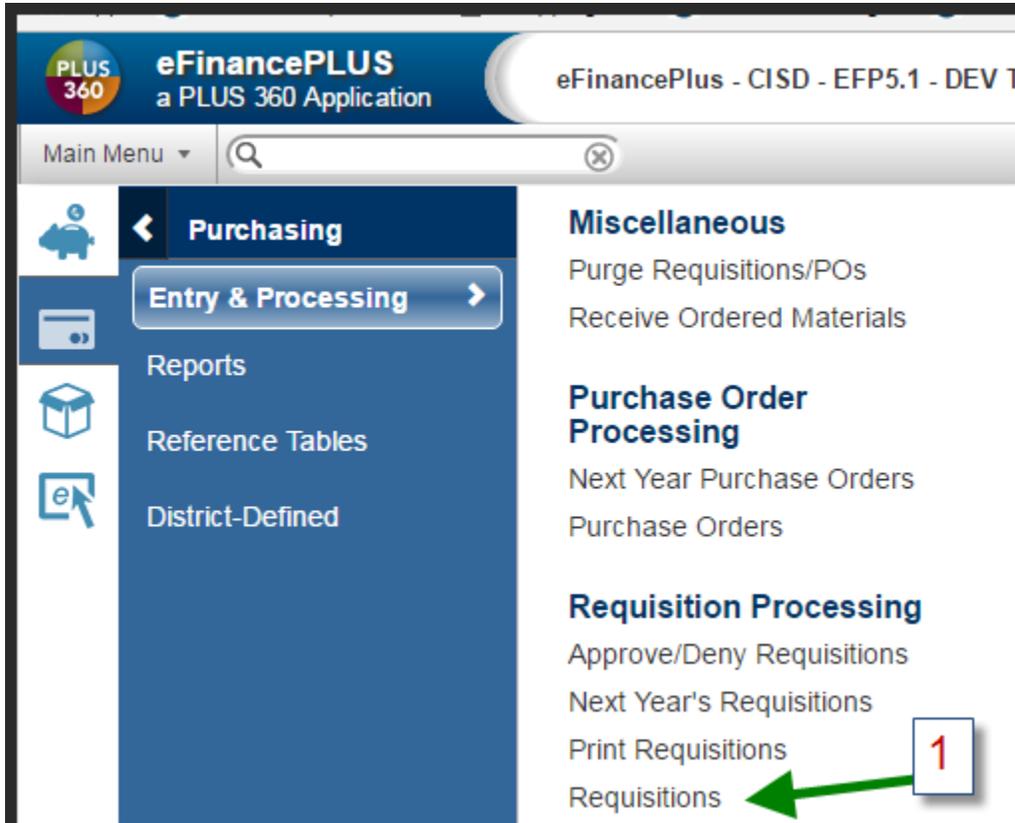
NEEDS CORRECTION STATUS

1. View the correction instructions and make the necessary changes.
2. Save the corrected requisition (to return it to the OPEN status).
3. Have the requisition re-approved by your administrator.

DENIED STATUS - Start over. Funding was returned when the requisition was denied.

To check the status and view the details on what needs to be corrected, follow these steps:

1. In eFinancePlus, click on **REQUISITIONS**.



2. The following screen will appear. Enter the requisition number listed on the email in the Requisition field and click  or .
3. The requisition will show in the lower panel, highlighted in yellow. Click  again to go to that requisition or double click on the highlighted line.

The screenshot shows the Requisition Search Criteria screen. The 'Requisition' field contains '287337' and is highlighted with a red box and a green arrow labeled '2'. The 'Find' button is highlighted with a red box and a green arrow labeled '3'. The search results table shows a requisition for 287337, dated 09/13/2016, with vendor MEDCO SUPPLY and buyer LAURIE TESTER.

Requisition	Date	Fiscal Year	Vendor #	Vendor Name	Buyer
287337	09/13/2016	2016	25001461	MEDCO SUPPLY	LAURIE TESTER

4. Click on the **Line Item Tab**.

Item	Description	Quantity	Price	Total
1	MEDICAL EQUIP/SUPPLIES	10.00	1.0000	

5. You will see that the **Status** of the requisition is **C- Needs Correction**.

6. Click on the **Approval Status** in the top menu to see the comments.

Date: 09/22/2016 Period: 6

Requisition: 287337 1

Commodity: 512

Stock Number:

Bid Item:

Fixed Asset:

Description: MEDICAL EQUIP/SUPPLIES

Status: C - Needs Correction

Shipping Charge Continuous

7. A pop-up box will appear as shown below.

The **Comments** section will give an explanation of what needs to be corrected on the requisition.

8. **Hover over the Comments section with your mouse.**

9. The entire character field will display as a pop-up box so that you can read all of the instructions.

Requisition Approval - CUSD - EFP5.1 - DEV TEST 5/5/16

Req Number 287337 Line No 1

Level/Code	Approver	Action Date	Action	Required	Comments
1	lenockse	09/22/2016	C - Needs Correction	Y - Yes	THIS POP-UP BOX IS WHERE YOU WILL READ THE INSTRUCTIONS FOR HOW TO CORRECT THIS REQUISITION. IT MAY SAY TO CHANGE THE COMMODITY CODE OR ACCOUNT CODE. IT MAY SAY TO SHIP TO 728 OR YOUR CAMPUS. IT MIGHT SAY SEE INSTRUCTIONS ON SHOPPING A-Z/ MEDICAL SUPPLIES FOR WHAT NEEDS TO GO IN THE DESCRIPTION. THERE ARE MANY OPTIONS FOR WHAT WILL GO HERE.

Approval History

Date	Time	Level/Code	Approver	Action Date	Action	Required	Comments
09/22/2016	15:05:58	1	lenockse	09/22/2016	C - Needs C	Y - Yes	THIS POP-UP BOX IS WHERE YOU WILL RE
09/22/2016	15:02:27	1			C - No Actio	Y - Yes	REQUISITION UPDATED - BE ROUTED FOR

10. Make the required corrections and SAVE.

NOTE:

Changes to the following fields of a requisition will remove the **NEEDS CORRECTION** status and all approvals and return the requisition status to **OPEN**:

- Changing the Department code
- Changing the budget
- Changing the commodity code. *This action also removes the description and may alter price and budget. After you change the commodity code- check that all of these fields are correct.

Changes to the following fields will **NOT** remove approvals or the **NEEDS CORRECTION** status:

- Adding or changing the Notes, Description, Comments, Vendor, or Attention fields.
- Changing the Ship To code.

Once you make the required corrections and SAVE the requisition, check the requisition status. If it is **OPEN** have it re-approved. If it still states **NEEDS CORRECTION** – change the DEPT code and SAVE. The status should now say OPEN. Change the DEPT code back to what it should be and have the requisition re-approved.

Another way to see the Status of a requisition is to pull up the requisition and click into the General Information (not Search Criteria). See examples below:

PLUS 360 eFinancePLUS
a PLUS 360 Application

Requisition Listing - CONROE INDEPENDENT SCHOOL DISTRICT

Print Requisitions Set Period Budget Transfers Budget Adjustments

Date: 06/28/2018 Period: 10/18

Search Criteria

Year: 2018 Requisition: 345799 Buyer: Recommended Vendor: Ship To: DEPARTMENT: Attention: Status: Date Requested: Date Required: Find Advanced

Click one more time to see accurate Status

Requisition	Date	Fiscal Year	Vendor #	Vendor Name	Buyer	DEPARTMENT	Amount	Status
345799	06/21/2018	2018	00000040	DIDAX INC			812.47	Printed

Header Line Item (1 of 2)

General Information

Requisition * 345799 DEPARTMENT * Requested 06/21/2018 Required 07/02/2018 Vendor 00000040 Vendor Address DIDAX INC 395 MAIN STREET ROWLEY MA 01969-3785

Open Comments ESC 19 Buyer Attention Ship To * 727N - CONROE ISD NORTH COUNTY WHSE 420 COCHRAN CONROE TX 77301 PH 936-709-7778

Continuous

Enable Full Account View

Use this Status

Item	Description	Quantity	Price	Total	BUDGET UNIT	Account	Status
1	ITEM# 9-00584. DEVELOPING NUMBER CONCEPTS - BOOK.	20.00	35.9500	719.00		6325	Partly Approved
99	ESTIMATED SHIPPING/HANDLING	0.00	0.0000	93.47		6325	Partly Approved