

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.

The approvers listed as “Processed by” may be:

rreeves	Rick Reeves
klaborde	Katy Laborde
jbradley	Janet Bradley
shenders	Stephanie Hendershot
rtitzman	Ryan Titzman
triclark	Trice Clark
tmcclaug	Terry Mcclaugherty
tross	Terri Ross

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

An overview of the steps involved are:

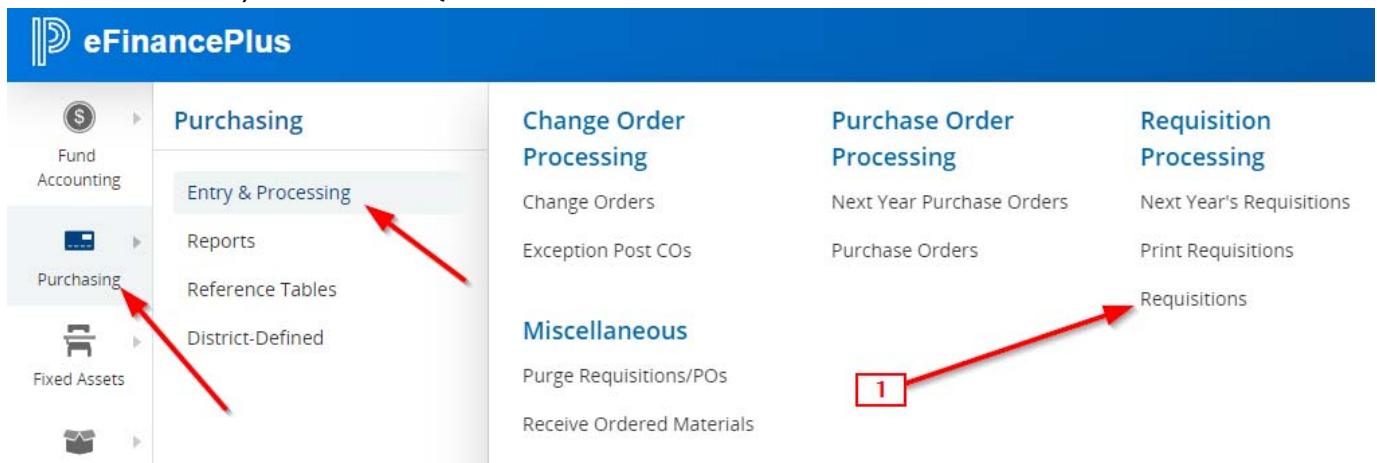
NEEDS CORRECTION STATUS



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 
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.

[Print Requisitions](#) [Set Period](#) [Budget Transfers](#) [Budget Adjustments](#) [Purchase Order D](#)



Date: 07/07/2022 Period: 11/22

Search Criteria

Year	<input type="text" value="2022"/>		Recommended Vendor	<input type="text"/>
Requisition	<input type="text" value="729012"/>		Ship To	<input type="text"/>
Buyer	<input type="text"/>		DEPARTMENT	<input type="text"/>
Date Requested	<input type="text" value="06/20/2022"/>		Attention	<input type="text"/>
Date Required	<input type="text" value="06/20/2022"/>		Status	<input type="text"/>

[Search](#)

[Advanced Search](#)

Requisition	Date	Fiscal Year	Vendor #	Vendor Name
729012	06/20/2022	2022	00001017	ORIENTAL TRADING

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

[Header](#)

[Line Item \(1 of 3\)](#)

General Information

Requisition *

729012

DEPARTMENT *

109 - OAK RIDGE ELEMENTARY

Requested

06/20/2022

Required

Vendor

00001017

Vendor Address

ORIENTAL TRADING

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.

Approval Status Vendor Quotes Purchase Order Detail Tax Rate Add Item Delete Line Item

Date: 07/07/2022 Period: 11/22

Header Line Item (1 of 3)

Detail Information

Requisition 729012 1

Commodity 300-007

Stock Number

Bid Item ☐

Fixed Asset ☐

Description * IN-13673667 CLEAR CLASSROOM BOOK ORGANIZER SET OF 6

Status 5 C - Needs Correction

☐ Shipping Charge ☐ Continuous

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

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

Requisition Approval - CON2011_Live

Req Number 729012 Line No 1

Level/Code	Approver	Action Date	Action	Required	Comments
1	jbradley	07/07/2022	C - Needs Correction	Y - Yes	ADD COMMODITY CODE TO LINE #2
2	teldridg	06/20/2022	A - Approved	Y - Yes	

Approval History

Date	Time	Level/Code	Approver	Action Date	Action	Required	Comments
07/07/2022	07:22:01	1	jbradley	07/07/2022	C - Needs Correction	Y - Yes	ADD COMMODITY CODE TO LINE #2
06/20/2022	12:24:01	2	teldridg	06/20/2022	A - Approved	Y - Yes	
06/20/2022	09:13:26	1			O - No Action	Y - Yes	REQUISITION ADDED - ROUTED FOR APPROVAL

9. 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.