Professional Services Purchase Orders Overview

According to the Agency Procurement and Surplus Property Manual, published by the Department of General Services, “Professional Services as defined in § 2.2-4301 of the Virginia Public Procurement Act (VPPA) means work performed by an independent contractor within the scope of the practice of accounting, actuarial services, architecture, land surveying, landscape architecture, law, dentistry, medicine, optometry, pharmacy, professional engineering, and the services of an economist procured by the State Corporation Commission.”

Cardinal tracks professional services expenditures against contracts using a purchase order (PO), and subsequent task orders (i.e., change order), as a means to manage contract activities. This process allows for easy reference and reporting.

POs, as well as subsequent task orders, are sent electronically through Virginia’s online electronic procurement system (eVA) to the supplier to confirm orders. The following is a typical scenario used to create a Professional Services PO and add a task order related to a contract.

For more detailed instructions on creating and managing POs, refer to the job aid titled **PR344 Creating Purchase Orders (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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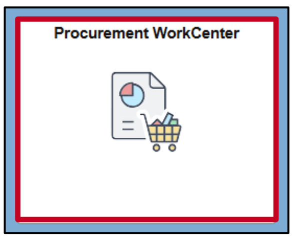
Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
9/20/2023	Baseline.

Creating a Professional Services Purchase Order from a Contract

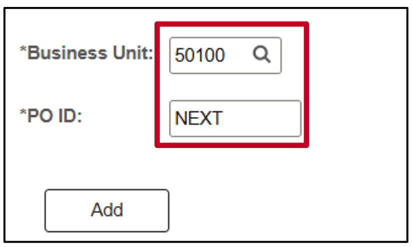
The PO is the principal tracking document and represents all activity related to the contract. In order to limit eVA fees, for each Professional Services contract, only one PO is created. **Line 1** of the PO should be equal to the value of the contract. Each subsequent line added to the PO is deemed a task order (i.e., change order) executed against the contract. As each task order is added to the PO, **Line 1** of the PO is decremented for the same amount as the task order. As a result, the sum of the Professional Services PO lines is always equal to the contract. In the example below, a Professional Services PO and subsequent task order are created against an existing contract.

Step	Action
1.	Navigate to the **Add/Update POs** page by clicking the **Procurement WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Purchase Order > Add/Update POs** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Purchase Order** page using the following navigation path: **NavBar > Menu > Purchasing > Purchase Orders > Add/Update POs**

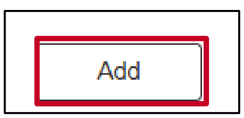
The **Purchase Order Add a New Value** page displays.

The **Business Unit** field should default based on the user's Agency.

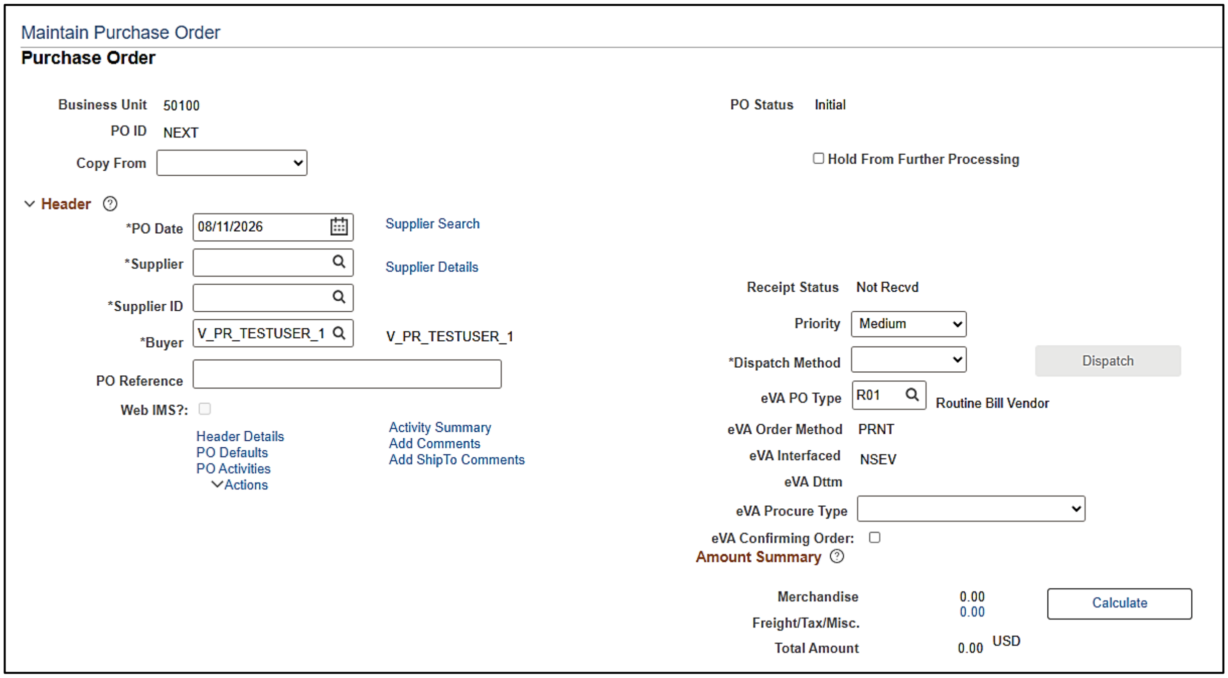
The **PO ID** field is automatically set to "NEXT" and should not be changed. Cardinal assigns a PO ID Number when the user saves the Purchase Order.



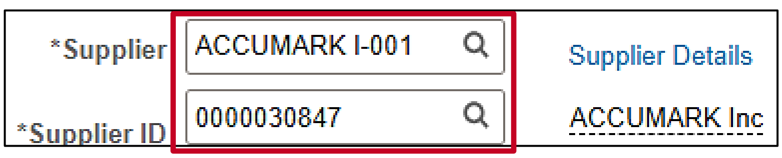
3. Click the **Add** button.



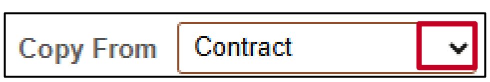
The **Maintain Purchase Order Purchase Order** page displays.



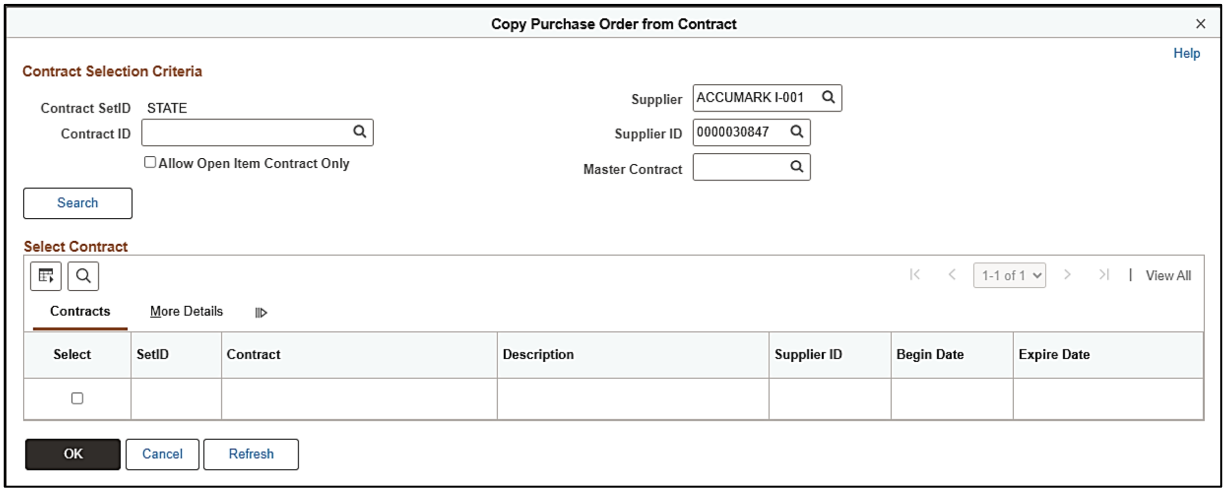
4. Enter the supplier using the **Supplier** or **Supplier ID** fields for the Contract.



5. Click the **Copy From** dropdown button and select “Contract”.



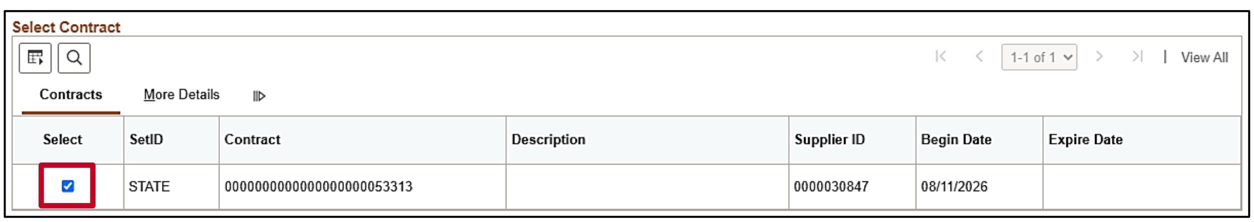
The **Maintain Purchase Order Copy Purchase Order from Contract** page displays.



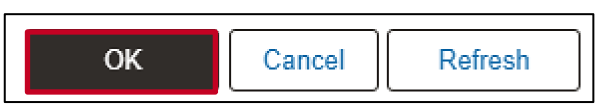
6. Enter the applicable Contract ID in the **Contract ID** field.

7. Click the **Search** button.

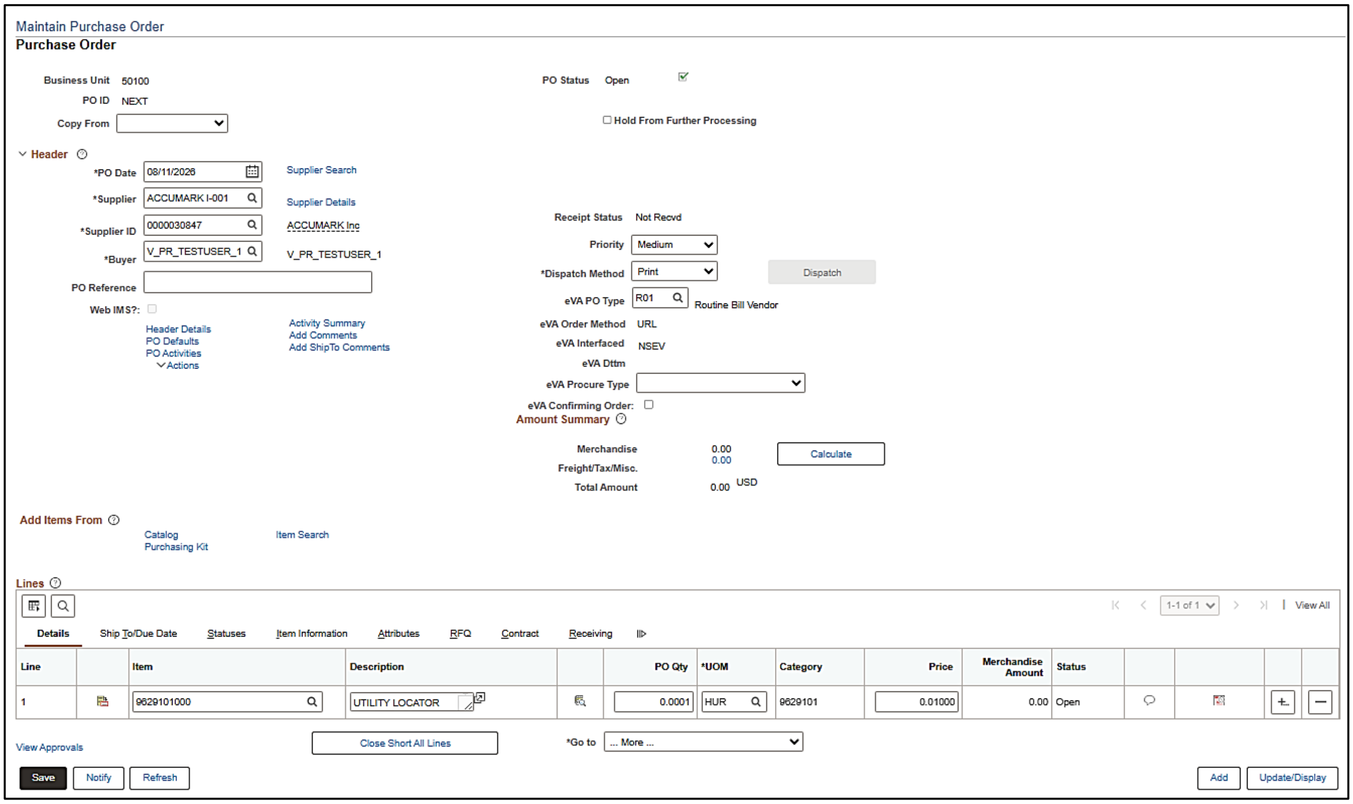
8. In the **Select Contract** section, **Contracts** tab, click the **Select** checkbox option.



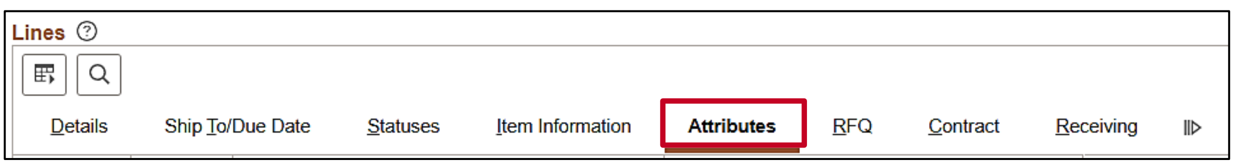
9. Click the **OK** button.



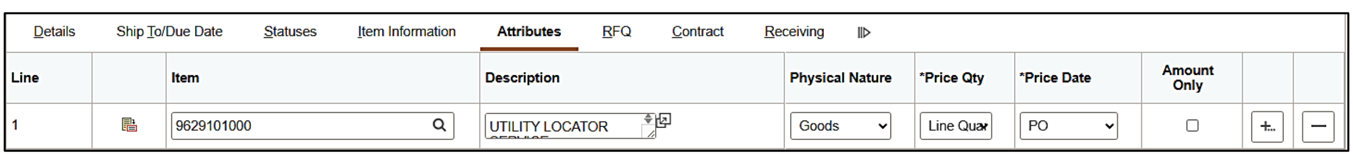
The **Maintain Purchase Order Purchase Order** page displays with the contract details and contract line data populated.



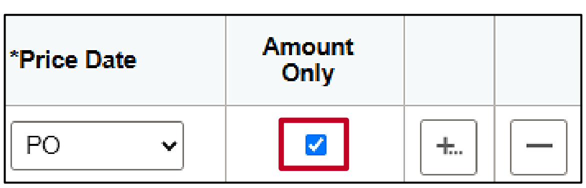
10.	Click the **Attributes** tab in the **Lines** section.



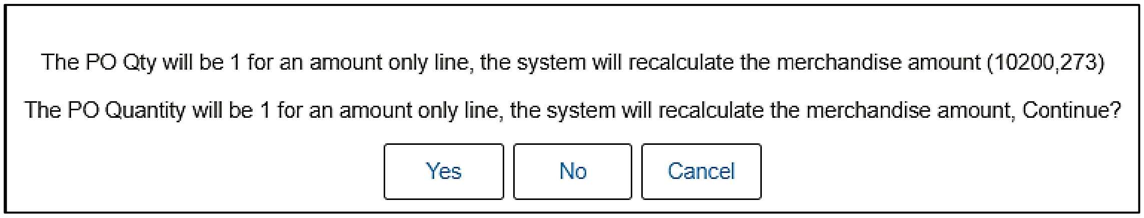
The **Attributes** tab displays.



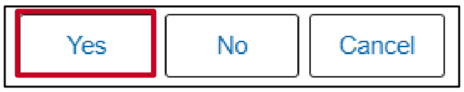
11.	Check the **Amount Only** checkbox.



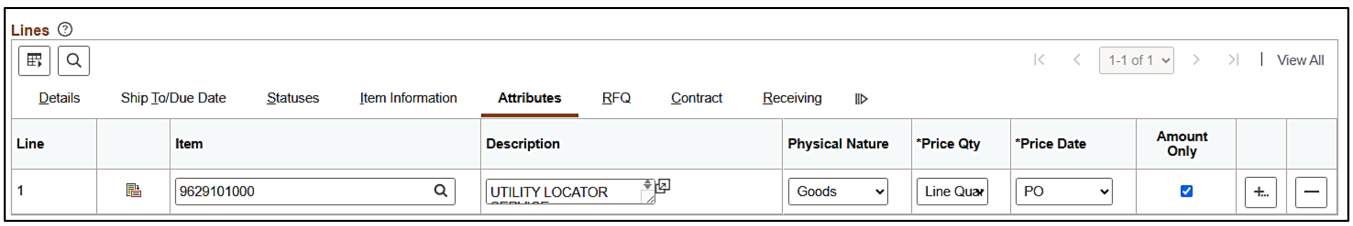
A notification displays in a pop-up window.



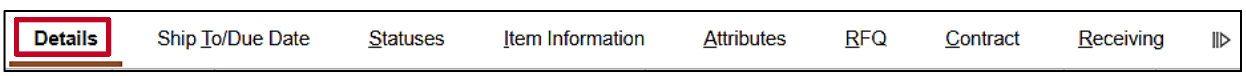
12. Click the **Yes** button.



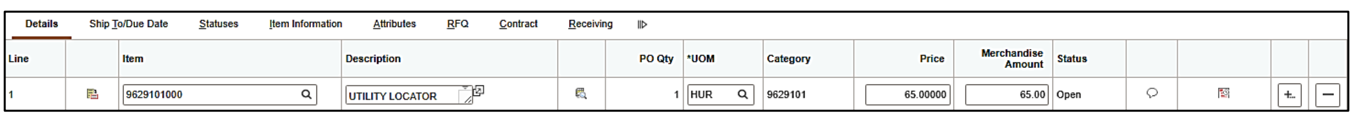
The **Lines** section displays again.



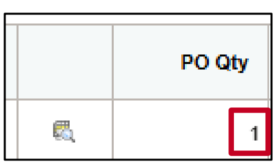
13. Click the **Details** tab.



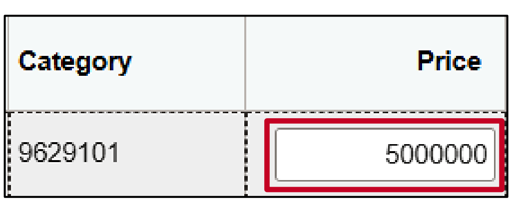
The **Details** tab displays.



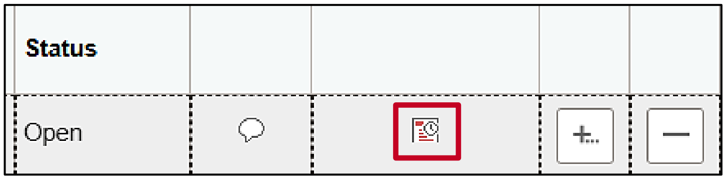
The **PO Qty** value is "1" and cannot be changed.



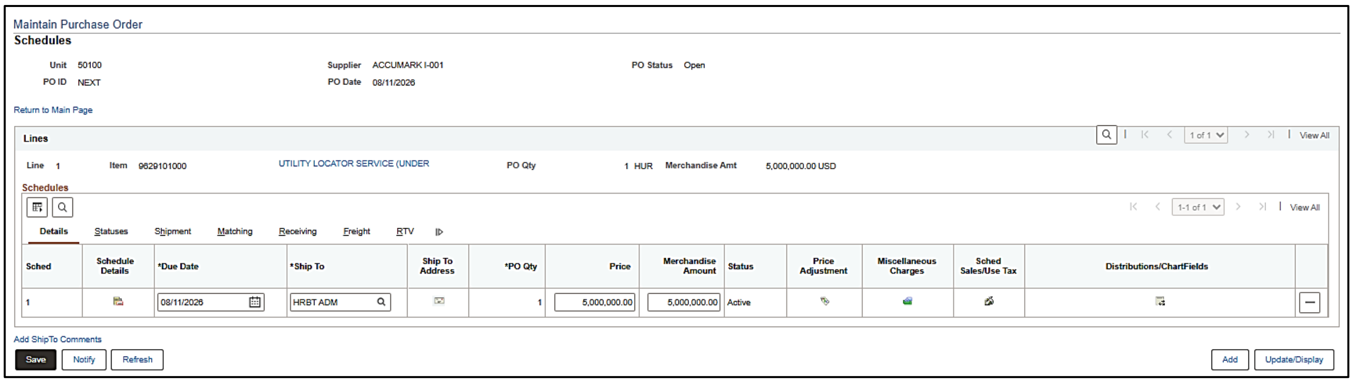
14. Update the **Price** field to match the total Contract value.



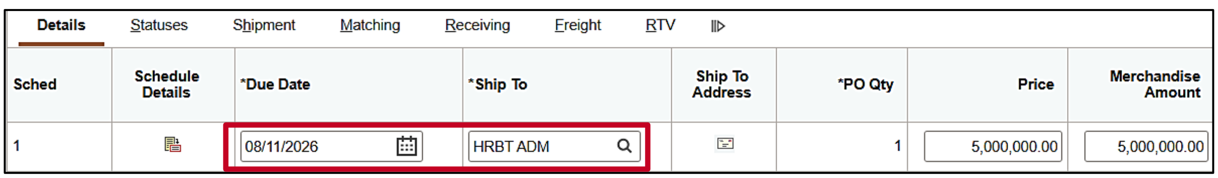
15. Click the **Schedule** icon.



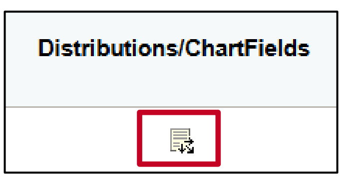
The **Maintain Purchase Order Schedules** page displays.



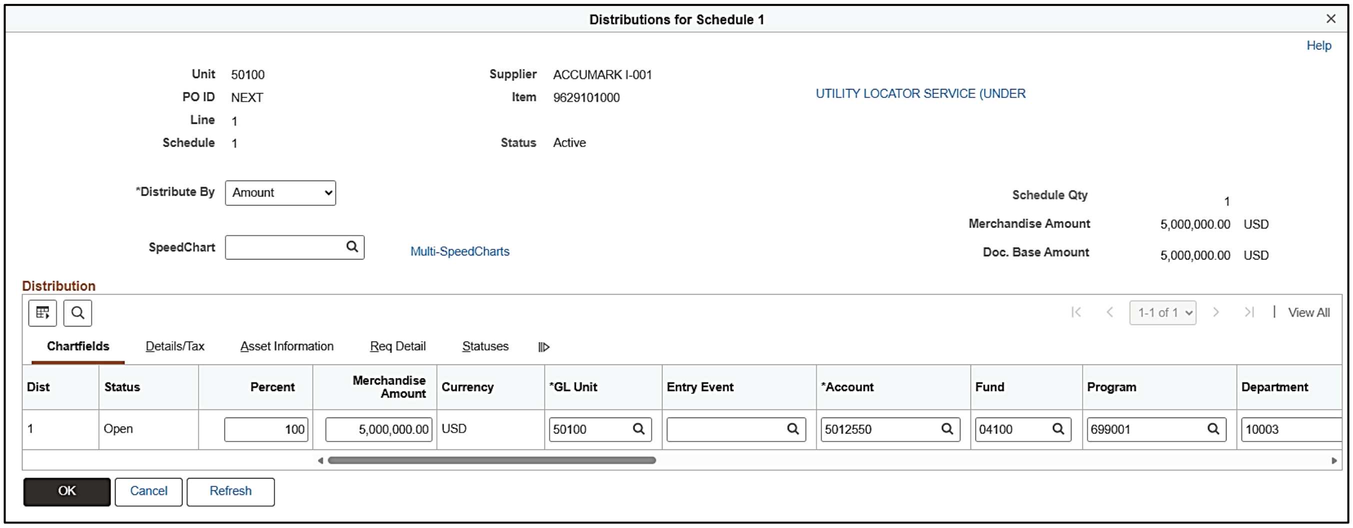
Values default in as shown. Change as necessary.

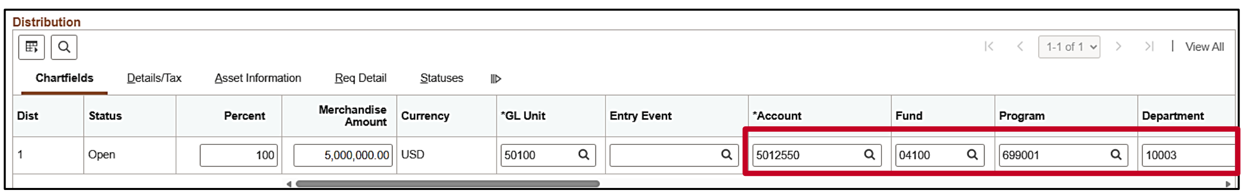
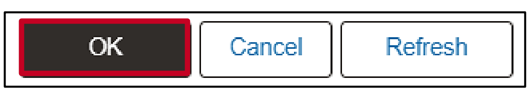


16. Click the **Distributions/ChartFields** icon.

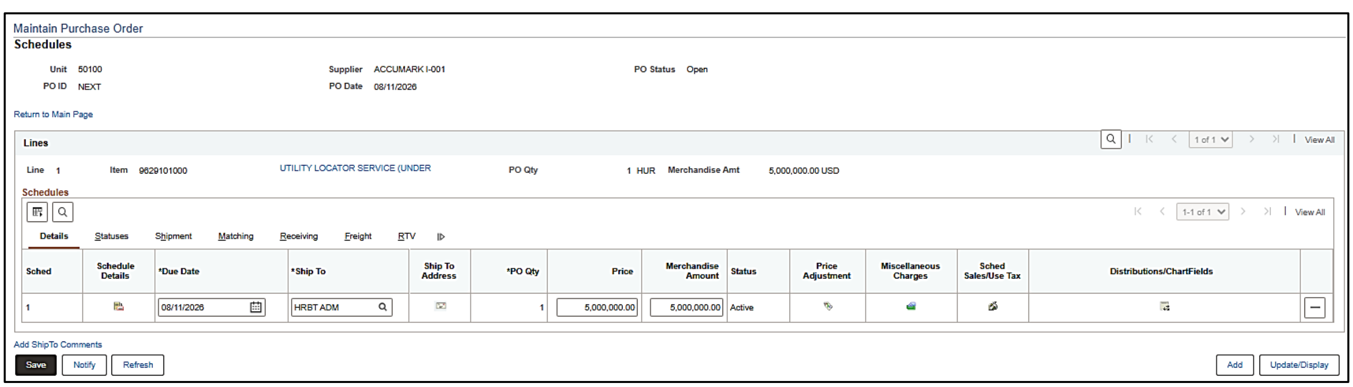


The **Distributions for Schedule 1** page displays in a pop-up window.



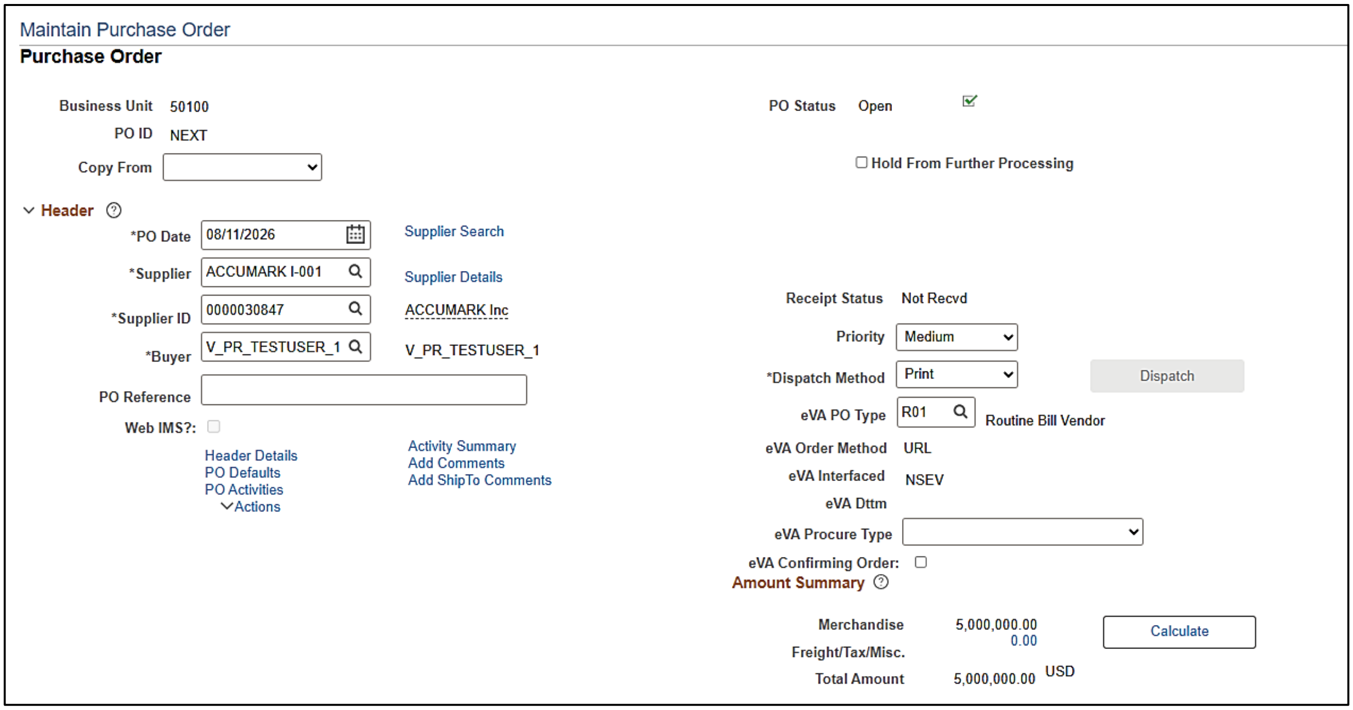
17.	Enter a valid accounting distribution (i.e., chart of accounts values). In this case, the user might enter administrative chart of accounts values since this is not project specific at this time. When the task orders are subsequently created, the user will enter the specific project chart of accounts values. 
18.	Click the **OK** button. 

The **Maintain Purchase Order Schedules** page displays.

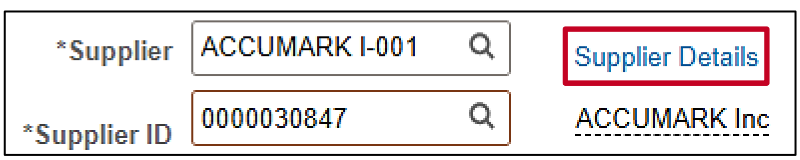


19. Click the **Return to Main Page** link.

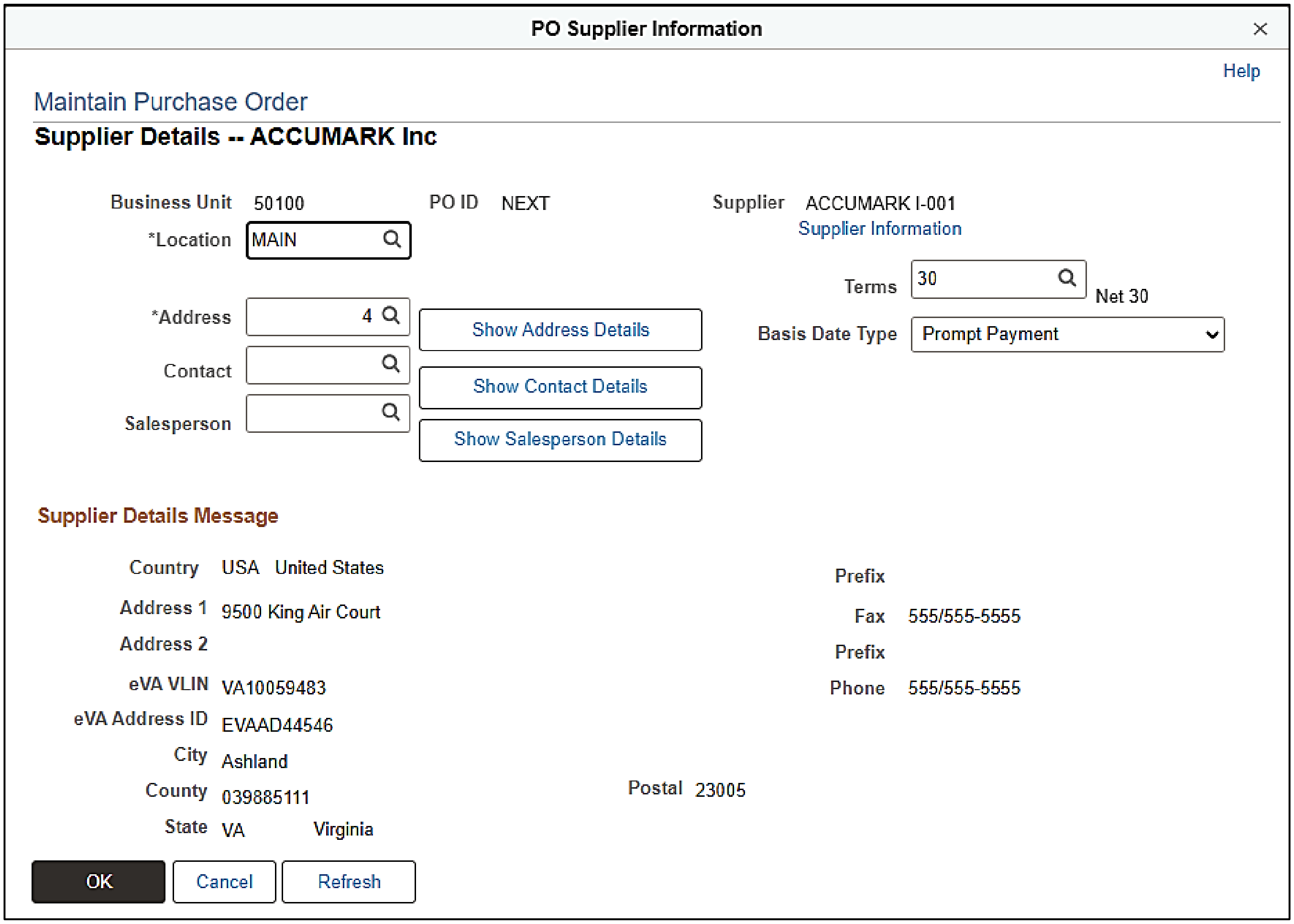
The **Maintain Purchase Order Purchase Order** page displays.

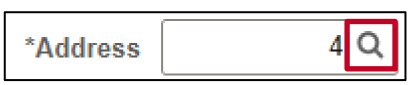
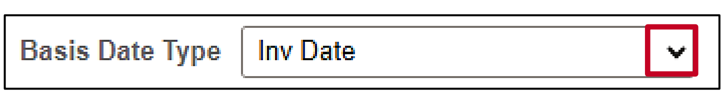


20. Click the **Supplier Details** link.

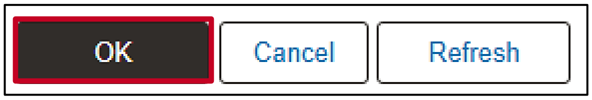


The **Maintain Purchase Order Supplier Details** page displays in a pop-up window.

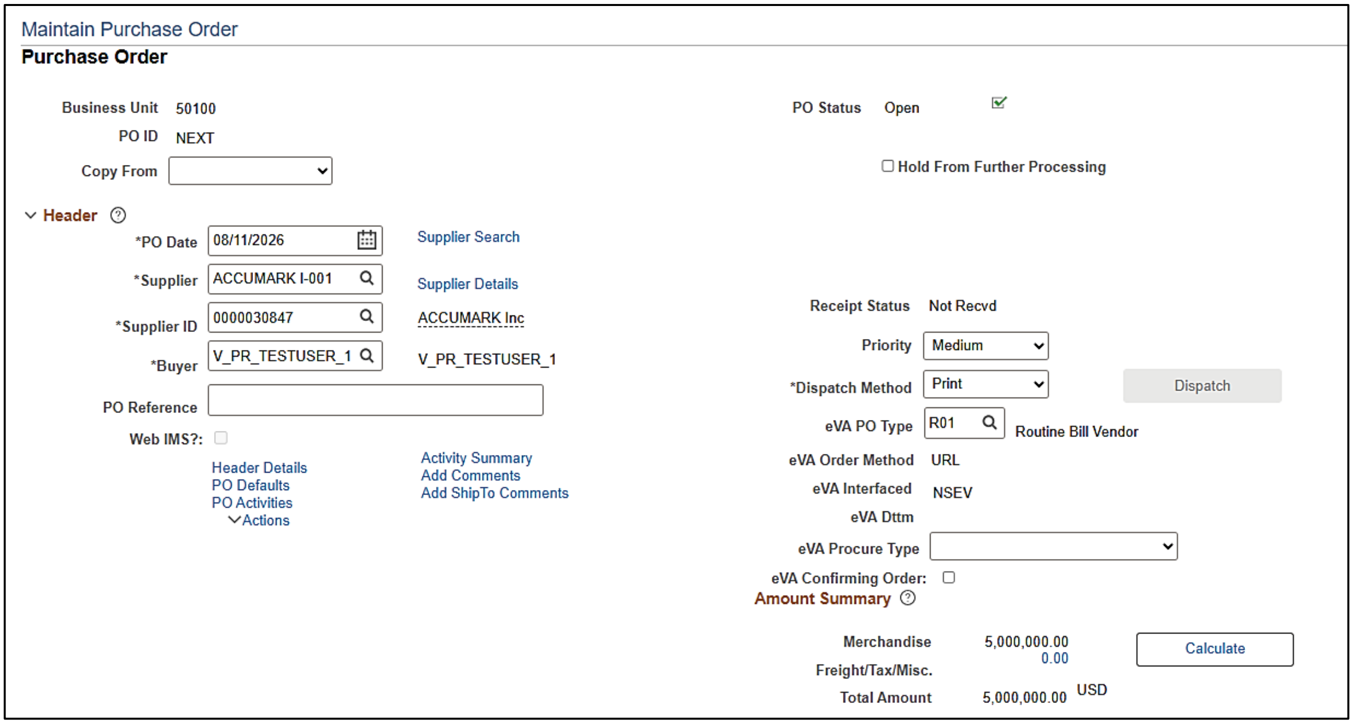


21.	The **Address** field defaults. Using the **Address Look up** icon, change the Address, if applicable. 
22.	Click the **Terms Look up** icon and select “00 Due Immediately”. 
23.	Click the **Basis Date Type** dropdown button and select “Inv Date”. 

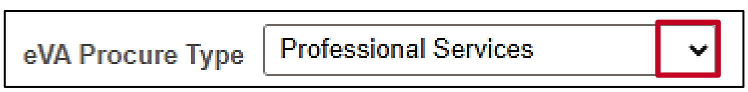
24. Click the **OK** button.



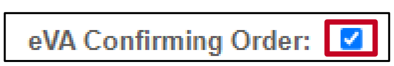
The **Maintain Purchase Order Purchase Order** page displays.



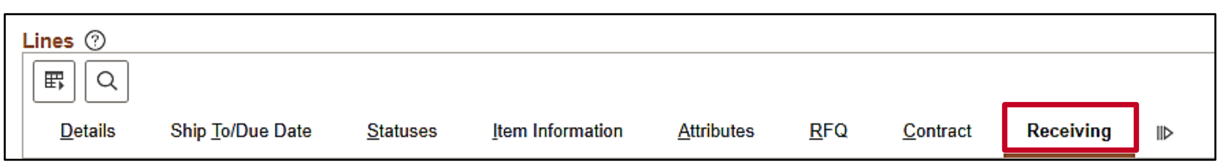
25. Click the **eVA Procure Type** dropdown button and select “Professional Services”.

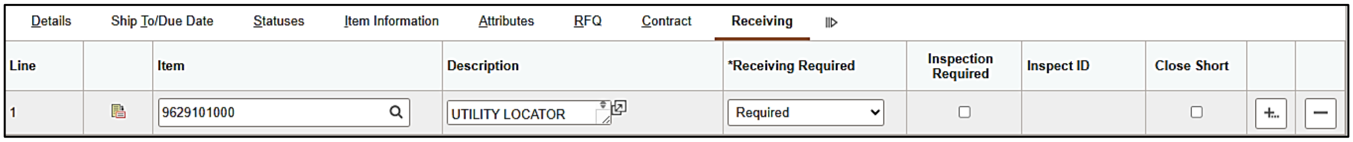
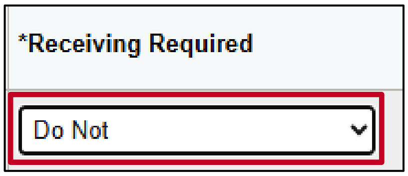
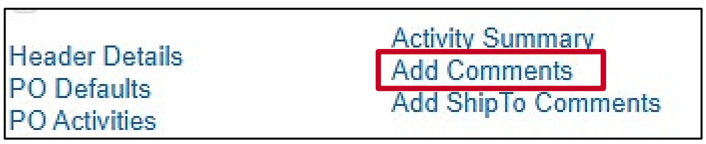
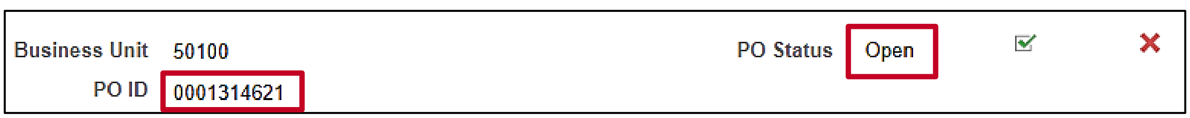
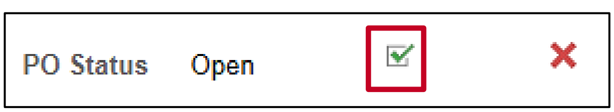


26. Select the **eVA Confirming Order** checkbox option as applicable.



27. Click the **Receiving** tab in the **Lines** section.

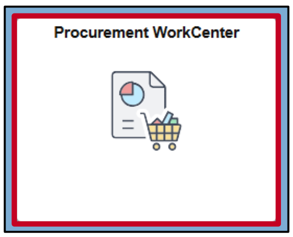
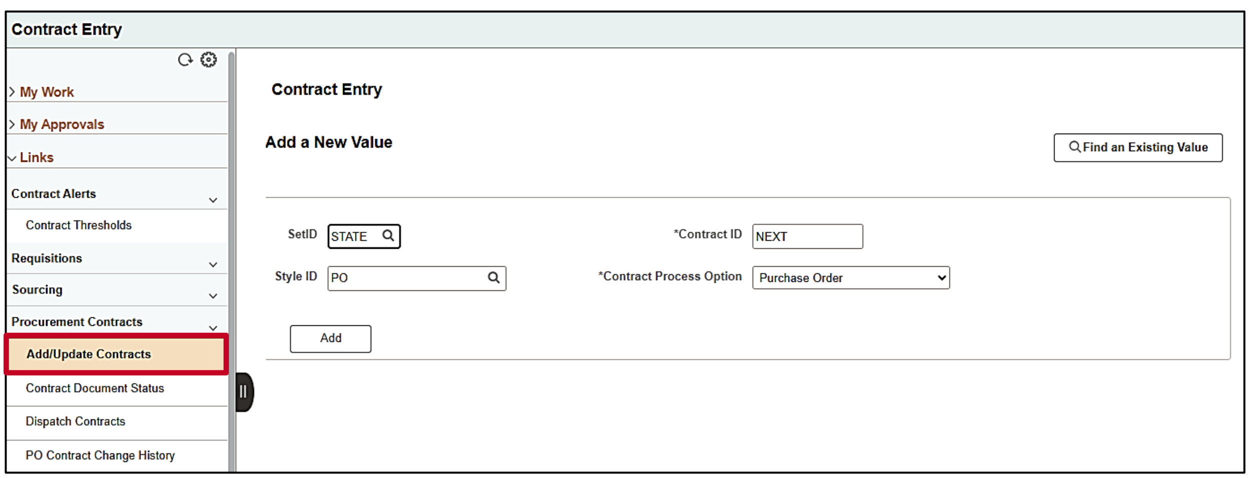


The **Receiving** tab displays. 	
28.	Click the **Receiving Required** dropdown button and select “Do Not”. 
29.	Click the **Add Comments** link to add comments and attachments to the Purchase Order as applicable. 
30.	Click the **Save** button. 
	Cardinal assigns a **PO ID** number upon save and the **PO Status** is set to **Open**. 
31.	Click the **Submit for Approval** icon (the green checkmark), to send the Purchase Order forward for approval by the user’s supervisor. 
	The PO will continue on through normal PO processing. Once the Purchase Order is dispatched, the PO is complete and ready to accept vouchers. For more detailed instructions on creating and managing POs, please refer to the job aid titled **PR344 Creating Purchase Orders (VDOT Only)** located on the Cardinal website in **Job Aids** under **Learning**.

Updating a Professional Services Purchase Order – Task Orders

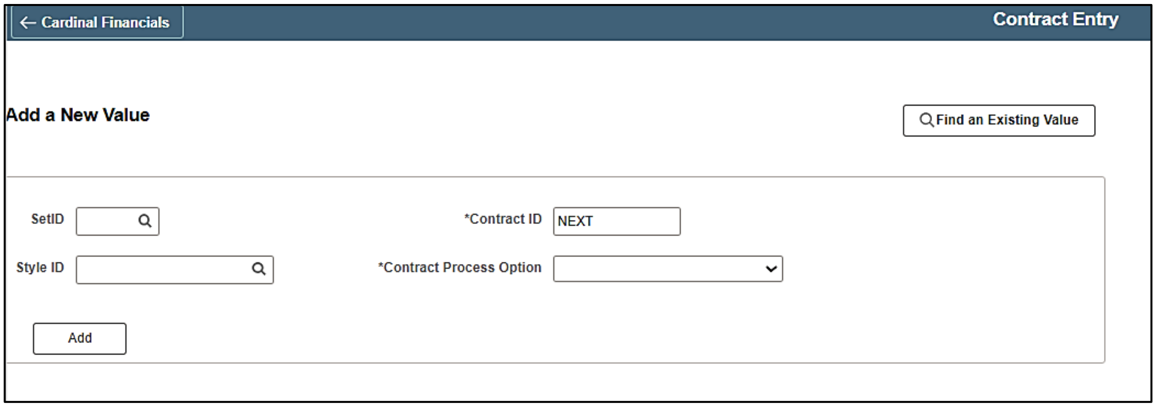
The PO is the principal tracking document and represents all activity related to the contract. In order to limit eVA fees, for each Professional Services contract, only one PO is created. **Line 1** of the PO should be equal to the value of the contract. Each subsequent line added to the PO is deemed a task order (i.e., change order) executed against the contract. As each task order is added to the PO, **Line 1** of the PO is decremented for the same amount as the task order. As a result, the sum of the Professional Services PO lines is always equal to the contract. In the example below, a Professional Services PO and subsequent task order are created against an existing contract.

Find the Related Purchase Order

Step	Action
1.	Navigate to the **Add/Update Contracts** page by clicking the **Procurement WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Procurement Contracts > Add/Update Contracts** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Contract Entry** page using the following navigation path: **NavBar > Menu > Procurement Contracts > Add/Update Contracts**

Step	Action

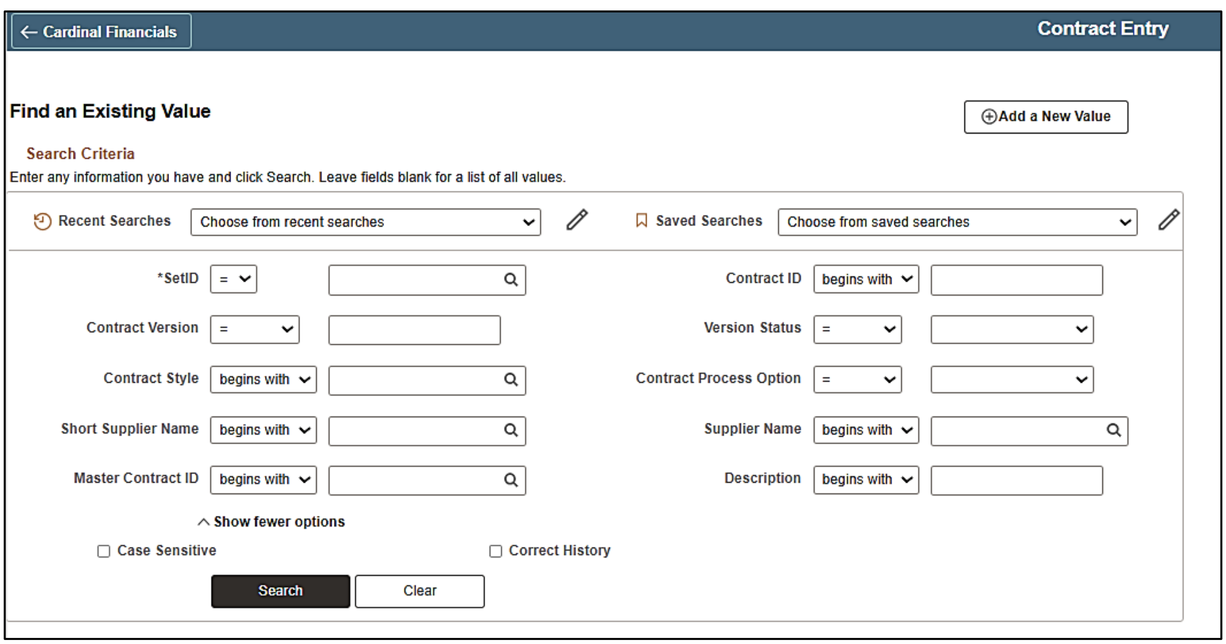
The **Contract Entry Add a New Value** page displays.

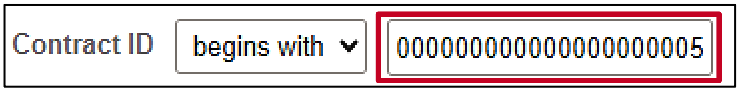
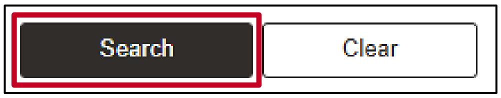


The **Contract Entry Find an Existing Value Search** page may open by default when clicking **Add/Update Contracts**, depending on the user's security permissions.

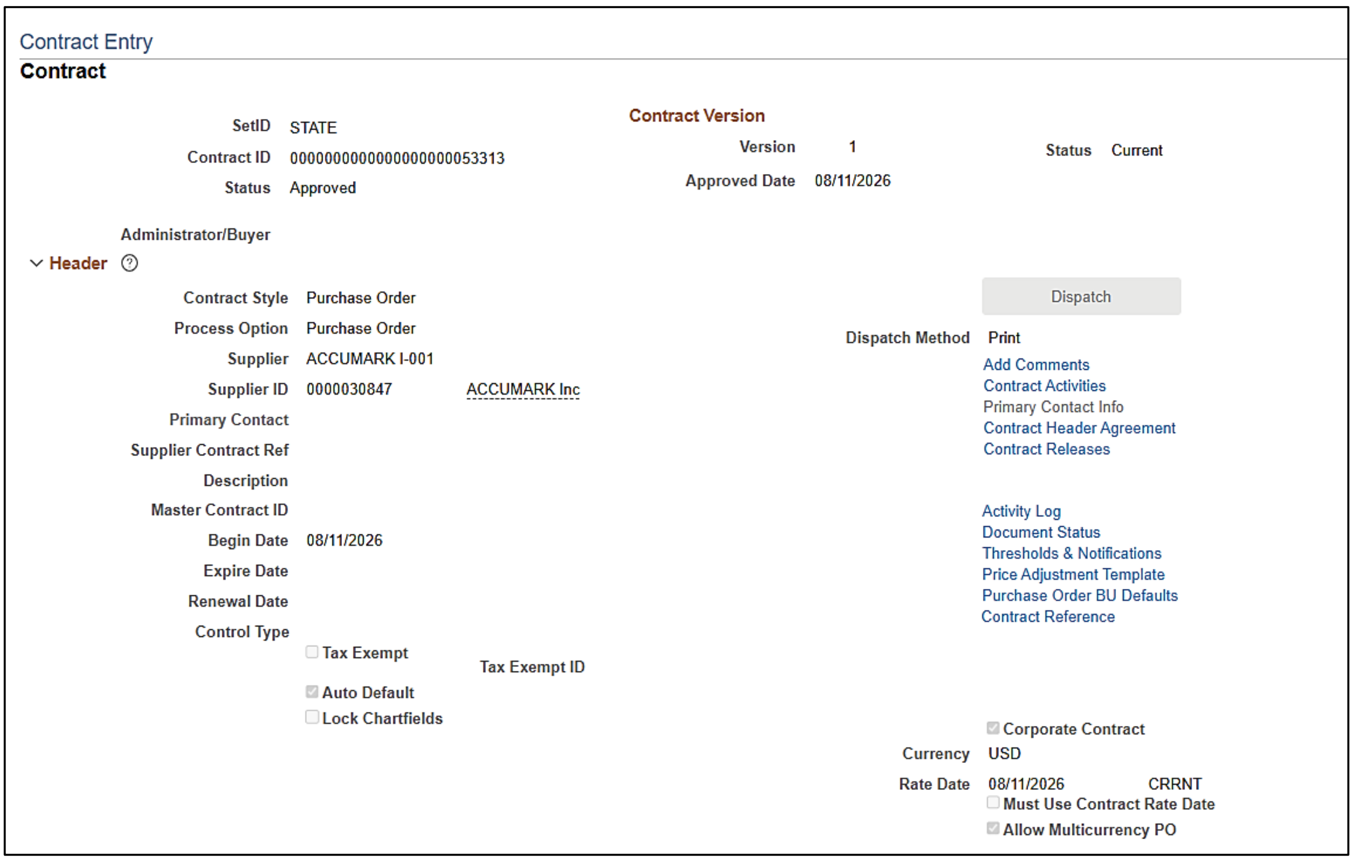
3. Click the **Find an Existing Value** button.

The **Contract Entry Find an Existing Value Search** page displays.



Step	Action
4.	Enter the Contract ID that will be used in the **Contract ID** field. 
5.	Click the **Search** button. 

The **Contract Entry Contract** page displays.



Contract Entry
Contract

SetID STATE
Contract ID 0000000000000000000053313
Status Approved

Contract Version
Version 1
Status Current
Approved Date 08/11/2026

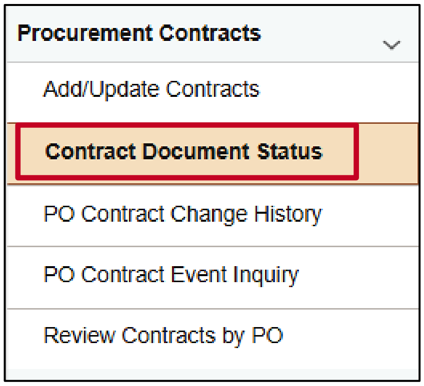
Administrator/Buyer

Header

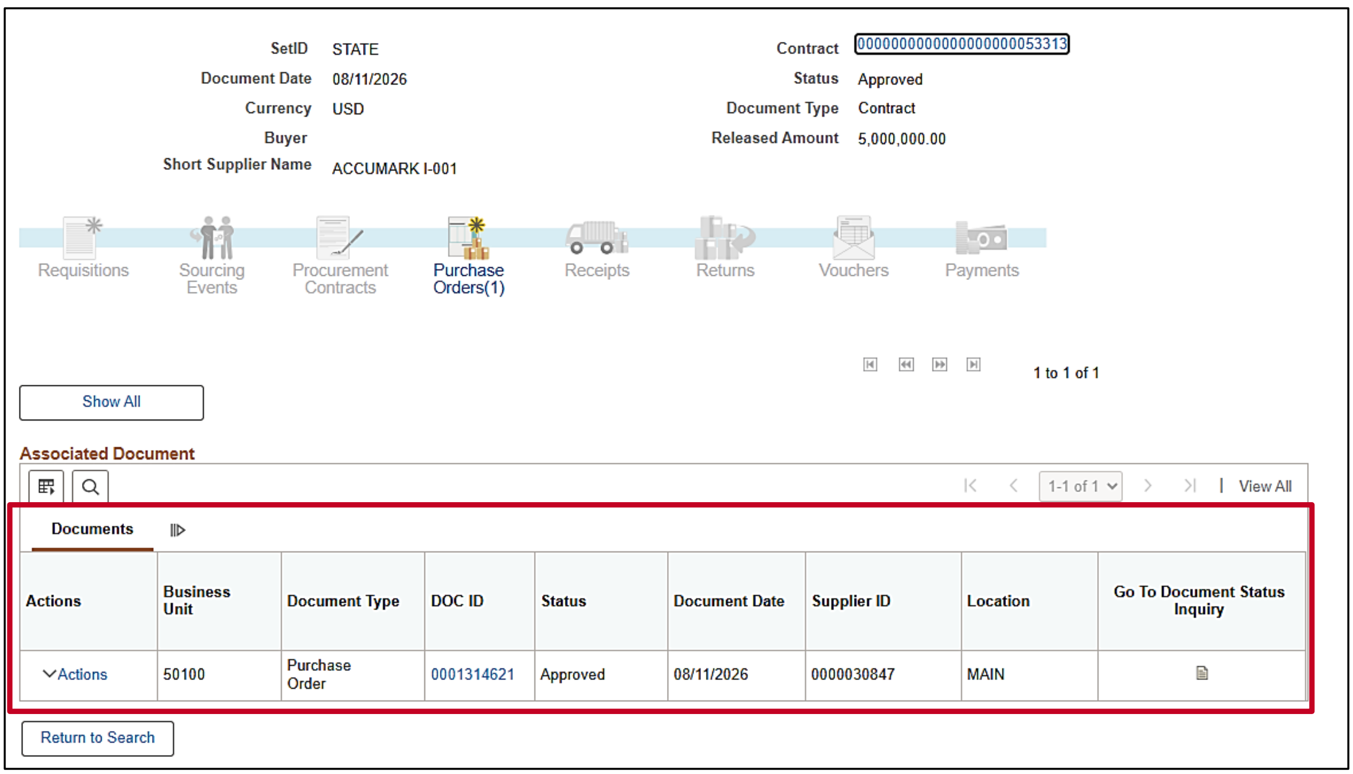
Contract Style Purchase Order
Process Option Purchase Order
Supplier ACCUMARK I-001
Supplier ID 0000030847 ACCUMARK Inc
Primary Contact
Supplier Contract Ref
Description
Master Contract ID
Begin Date 08/11/2026
Expire Date
Renewal Date
Control Type
Tax Exempt
Tax Exempt ID
Auto Default
Lock Chartfields

Dispatch
Dispatch Method Print
Add Comments
Contract Activities
Primary Contact Info
Contract Header Agreement
Contract Releases
Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
Purchase Order BU Defaults
Contract Reference

Corporate Contract
Currency USD
Rate Date 08/11/2026 CRRNT
Must Use Contract Rate Date
Allow Multicurrency PO

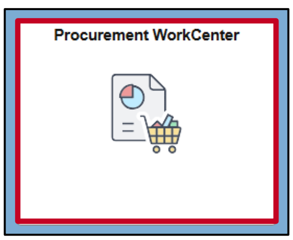
Step	Action
6.	Click the **Contract Document Status** link in the WorkCenter navigation bar. 

The **Contract DOC Status Inquiry** page displays. Related documents, such as requisitions, sourcing events, POs, and payments, display at the bottom of the page.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Note the DOC ID for the Purchase Order associated with the Contract. For a PO document, the DOC ID is the same as the PO ID number. Use this number to find and update the PO.
<table>
<tr><th>Document Type</th><th>DOC ID</th><th>Status</th></tr>
<tr><td>Purchase Order</td><td>0001314621</td><td>Approved</td></tr>
</table>
</td></tr>
<tr><td></td><td>The user can click the DOC ID link to view that document’s details.</td></tr>
</table>

Create the Task Order

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Add/Update POs page by clicking the Procurement WorkCenter tile.


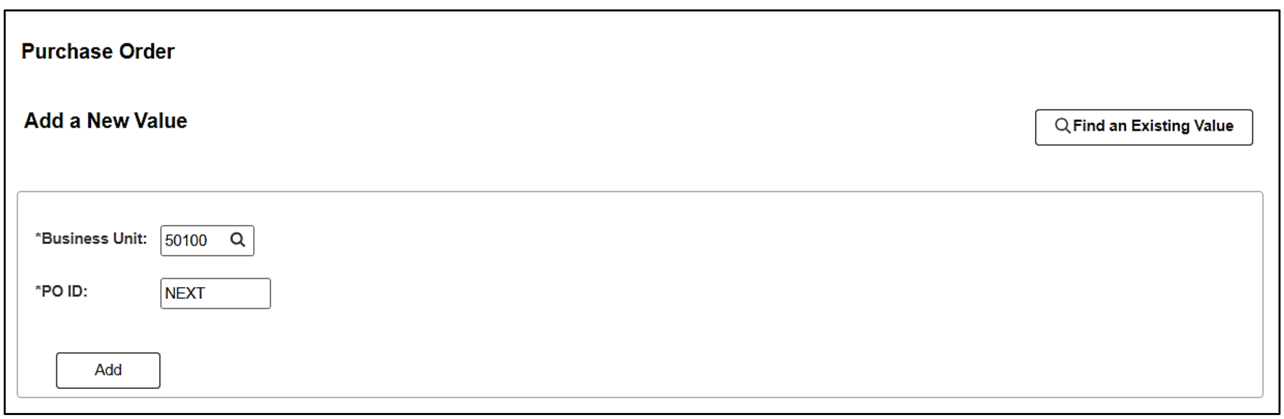
</td></tr>
<tr><td></td><td>For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2.</td><td>
Use the following navigation in the WorkCenter: Links > Purchase Order > Add/Update POs

Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles.

</td></tr>
<tr><td></td><td>
Users can also access the Purchase Order page using the following navigation path:

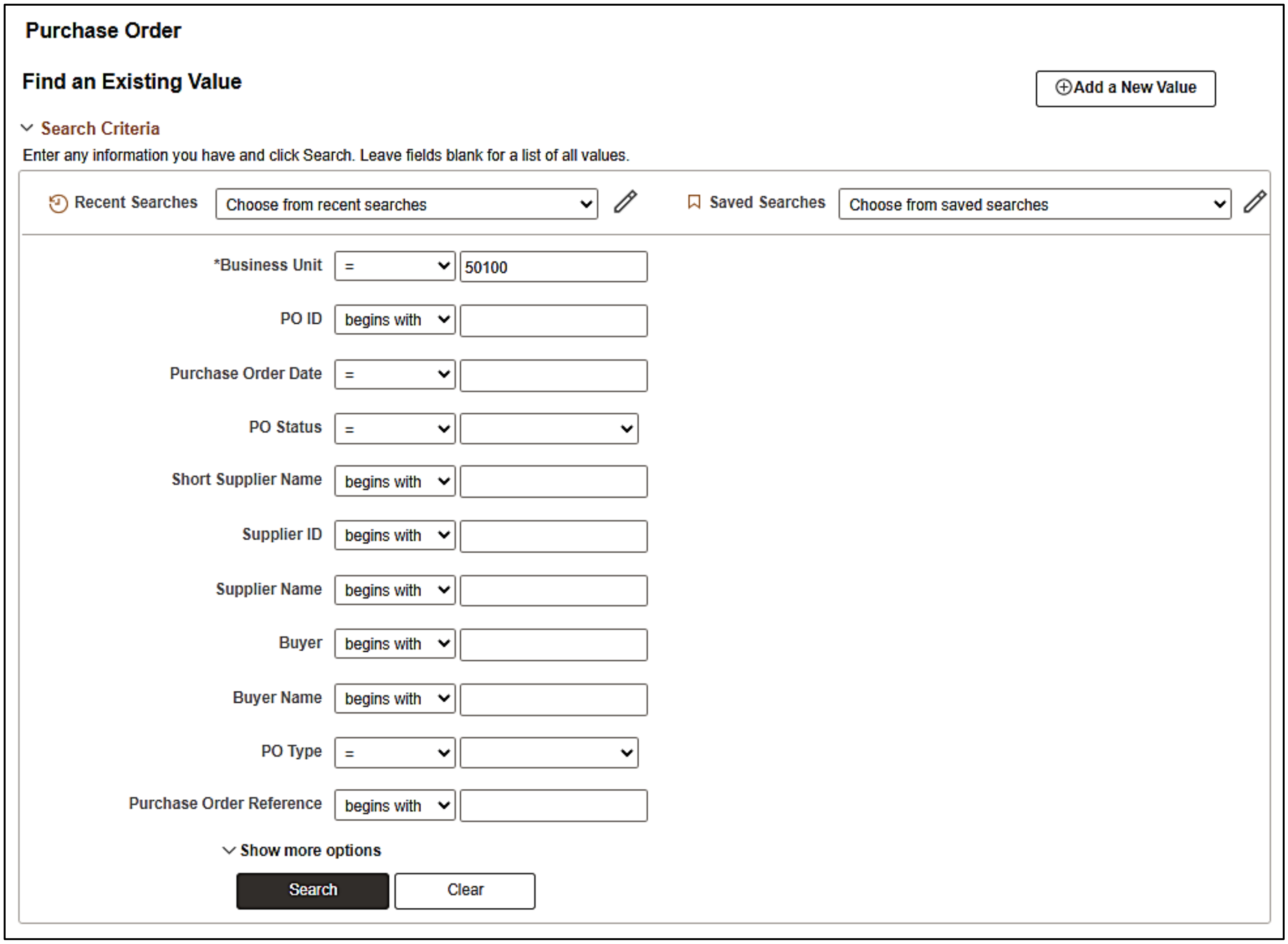
NavBar > Menu > Purchasing > Purchase Orders > Add/Update POs
</td></tr>
<tr><td colspan="2">
The Purchase Order Add a New Value page displays.

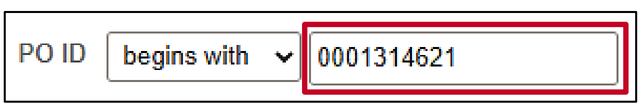
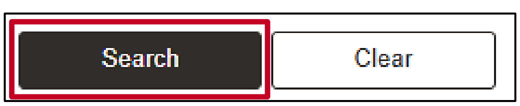


</td></tr>
<tr><td>3.</td><td>
Click the Find an Existing Value button.

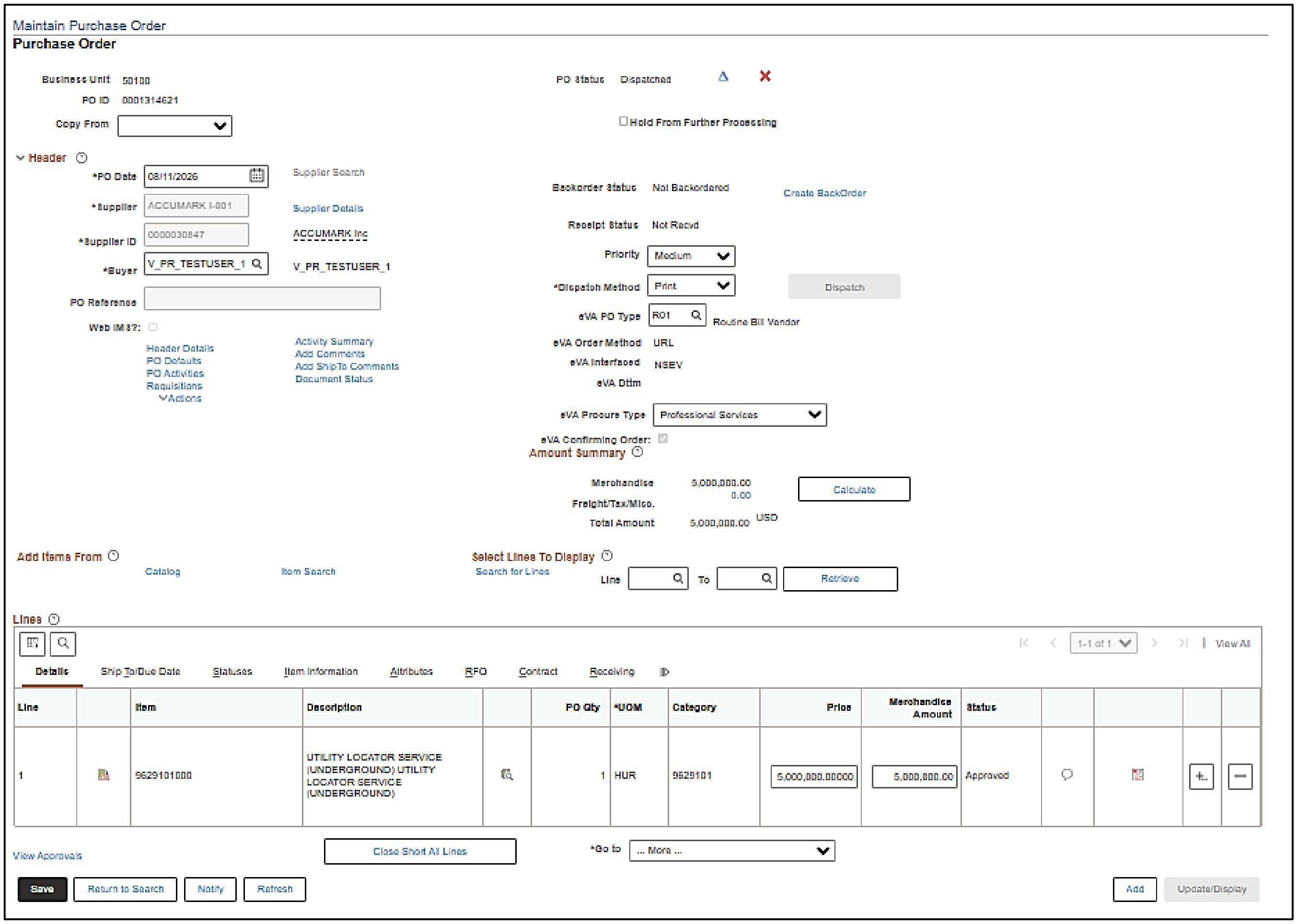
</td></tr>
</table>

The **Purchase Order Find an Existing Value Search** page displays.

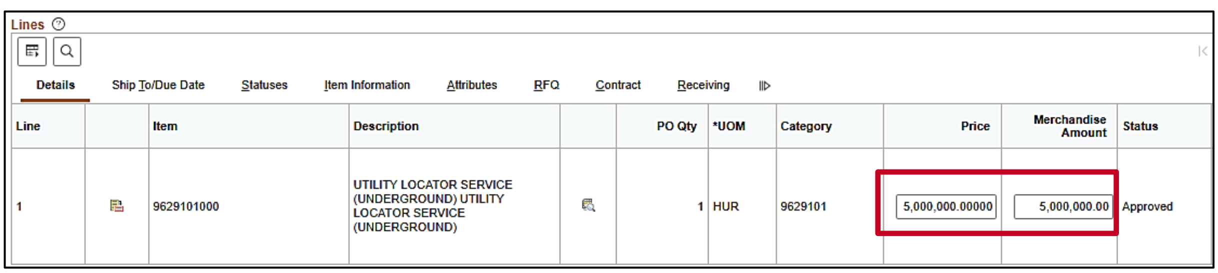


4.	Enter the PO ID (i.e., Purchase Order DOC ID) in the **PO ID** field. 
5.	Click the **Search** button. 

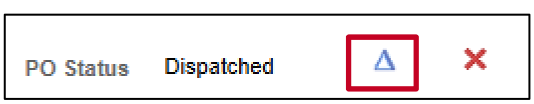
The **Maintain Purchase Order Purchase Order** page displays.

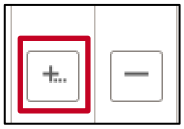
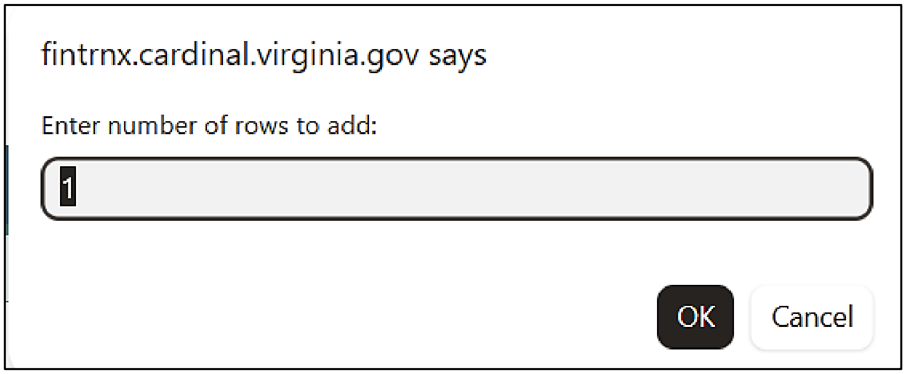
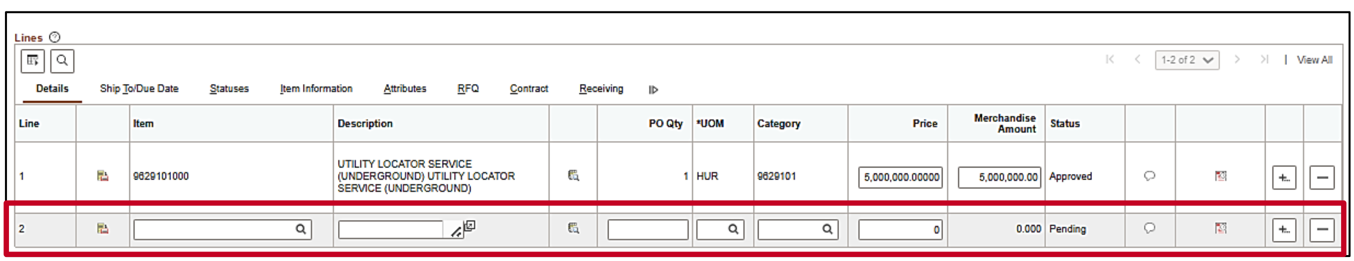
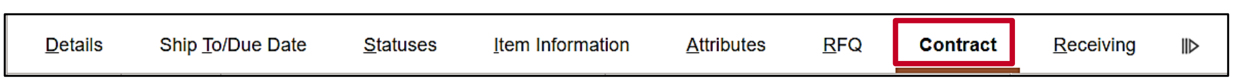


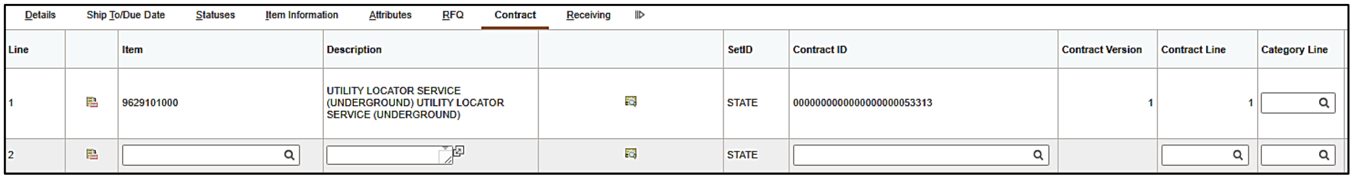
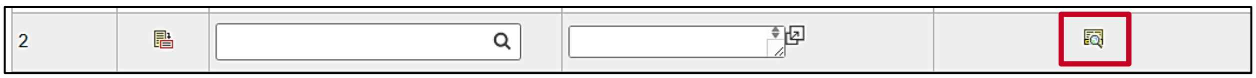
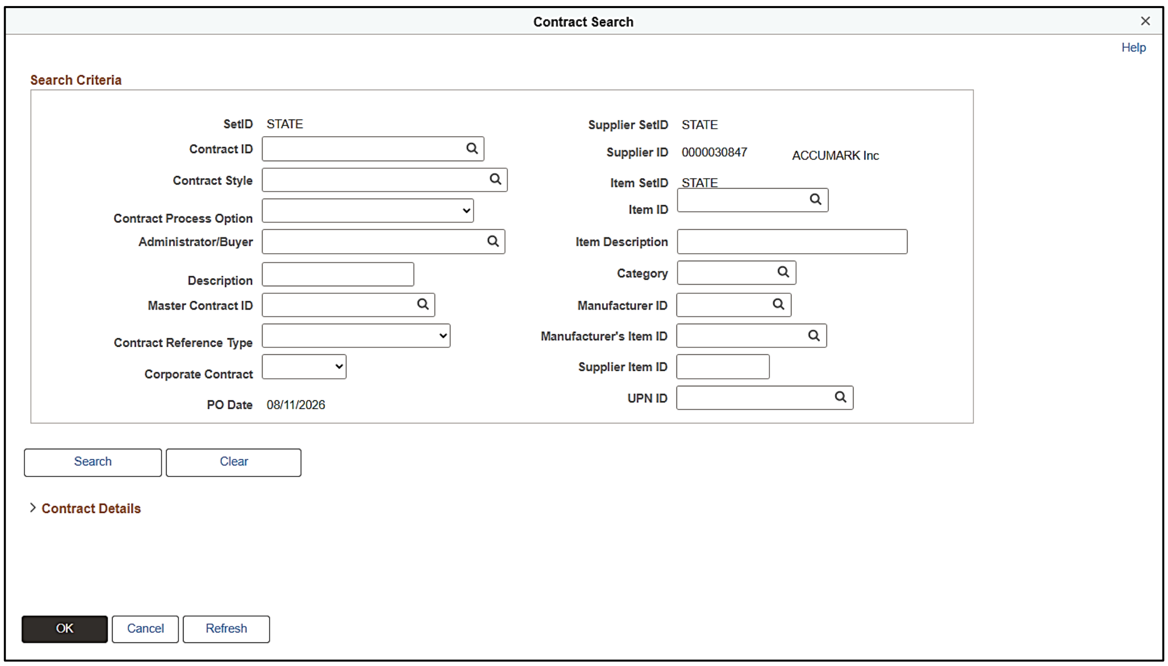
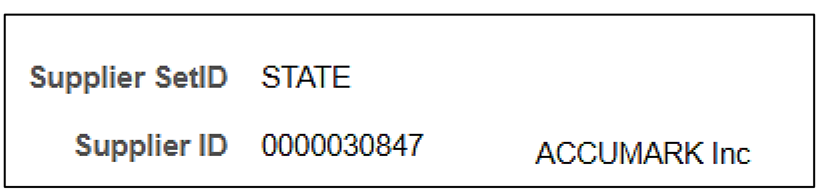
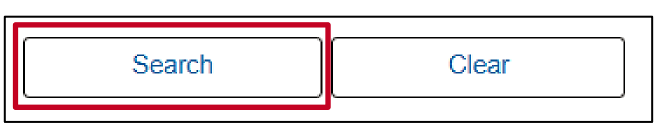
6. Confirm that **Line 1** matches the contract value.



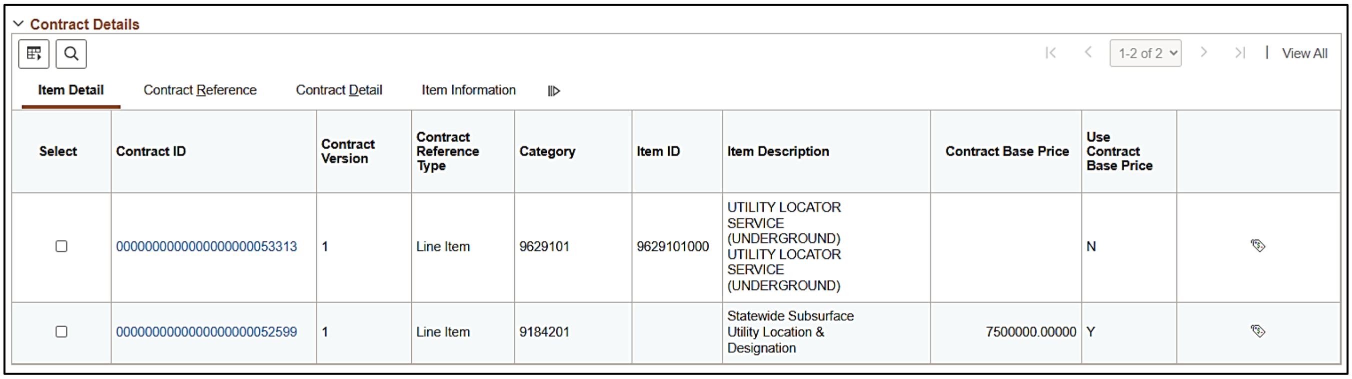
7. Click the **Change Order** blue triangle icon to initiate the task order (i.e., change order).

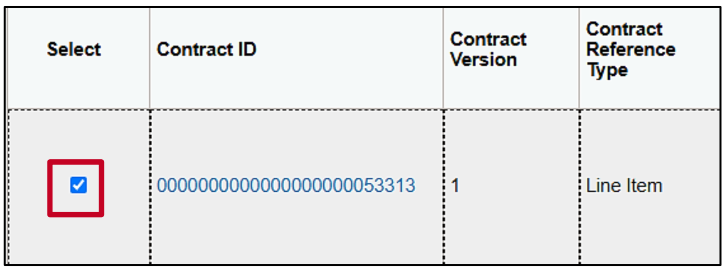
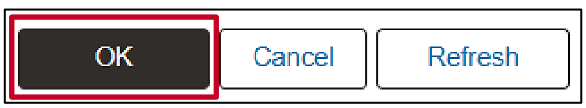


8.	Click the **Add multiple new rows** (**+...**) button to the right of **Line 1** to add a new line. 
The **Explorer User Prompt** pop-up window displays. 	
9.	Enter the number of rows to add. 
10.	Click the **OK** button. 
The new line displays and is available for insertion of values. 	
11.	Click the **Contract** tab. 

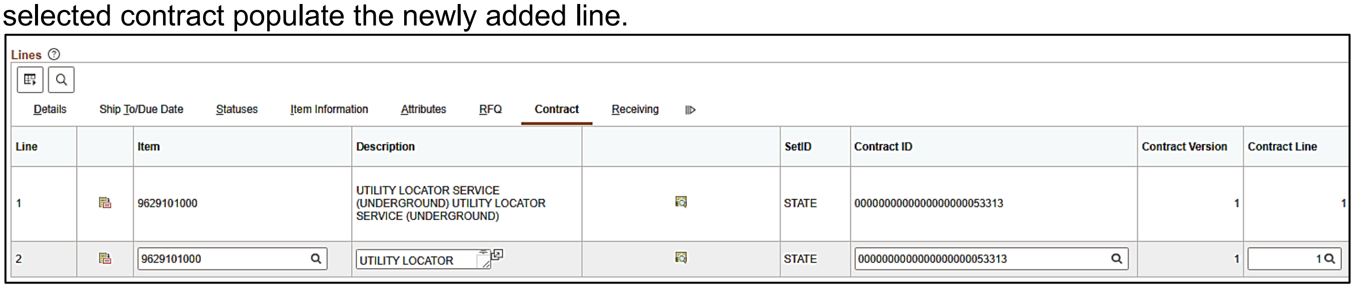
The **Contract** tab displays. 	
12.	Click the **Contract Search** icon on the newly-created line. 
The **Contract Search** page displays in a pop-up window. 	
ℹ	The Supplier information has prepopulated. 
13.	Click the **Search** button. 

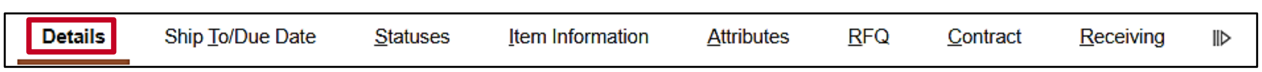
The **Contract Details** section displays.



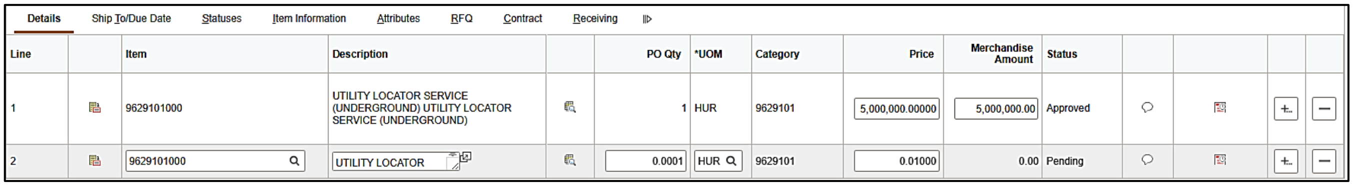
14.	Select the contract/line to use to populate the PO line using the corresponding checkbox. 
15.	Click the **OK** button. 

The **Lines** section redisplays. The **Description**, **Contract ID**, and **Contract Line** number from the selected contract populate the newly added line.



16.	Click the **Details** tab. 

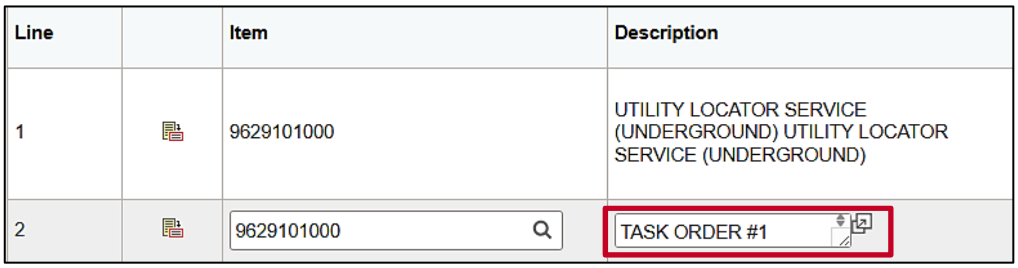
The **Details** tab displays.



Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

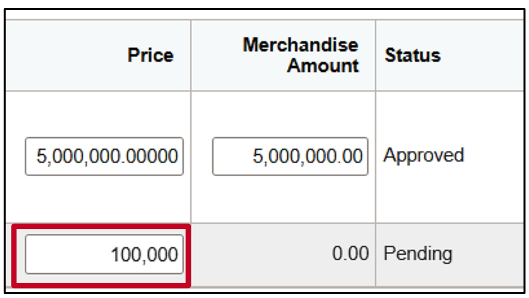
Line		Item	Description		PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		9629101000	UTILITY LOCATOR SERVICE (UNDERGROUND) UTILITY LOCATOR SERVICE (UNDERGROUND)		1	HUR	9629101	5,000,000.00000	5,000,000.00	Approved
2		9629101000	UTILITY LOCATOR		0.0001	HUR	9629101	0.01000	0.00	Pending

17. On the new **Line** (e.g., **Line 2**), update the **Description** field to identify the line as a task order.



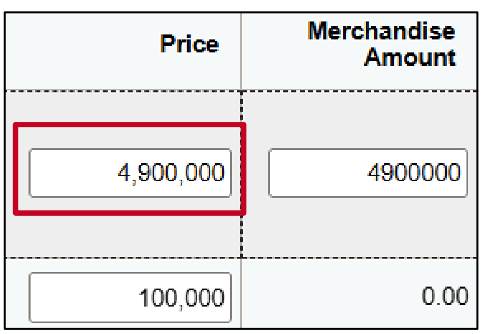
Line		Item	Description
1		9629101000	UTILITY LOCATOR SERVICE (UNDERGROUND) UTILITY LOCATOR SERVICE (UNDERGROUND)
2		9629101000	TASK ORDER #1

18. On the new **Line** (e.g., **Line 2**), insert the value of the task order in the **Price** field.



Price	Merchandise Amount	Status
5,000,000.00000	5,000,000.00	Approved
100,000	0.00	Pending

19. On **Line 1,** decrement the **Price** field by the amount of the new line/task order (in this example **Line 2**).

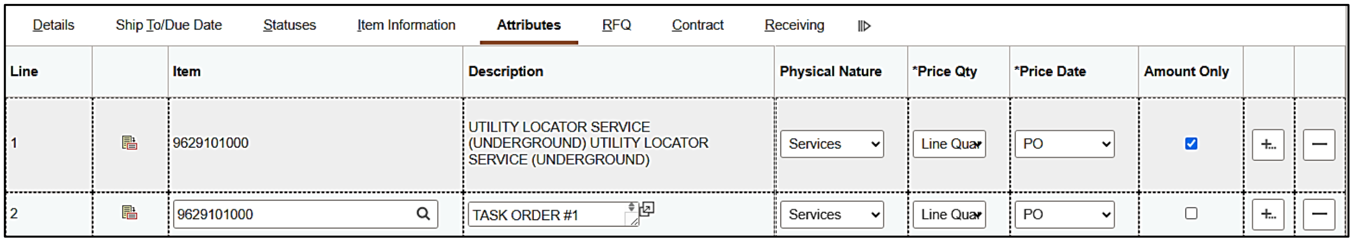


Price	Merchandise Amount
4,900,000	4900000
100,000	0.00

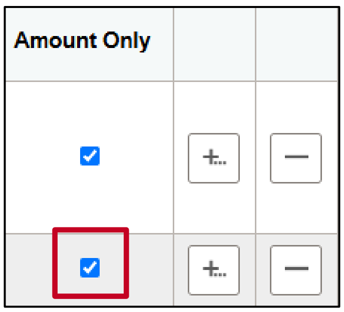
20. Confirm that the sum of all the PO lines equal the original PO amount, which is equal to the total contract value. (Sum PO Lines = Original PO Total = Contract Total)

21. Click the **Attributes** tab.

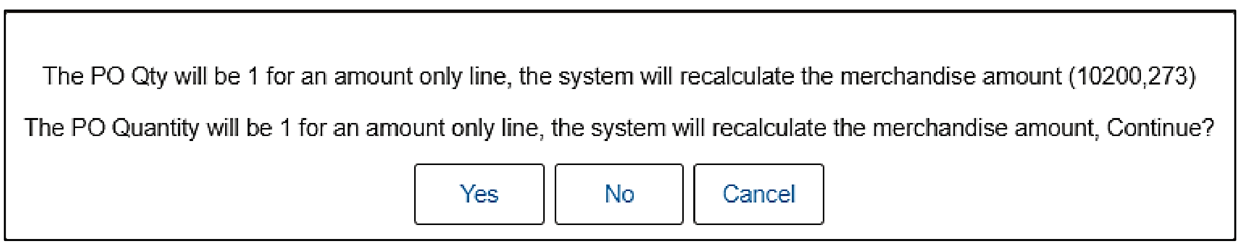
The **Attributes** tab displays.



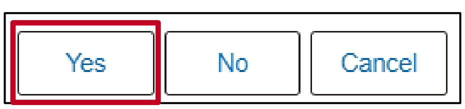
22. On the new line (e.g., **Line 2**), select the **Amount Only** checkbox.



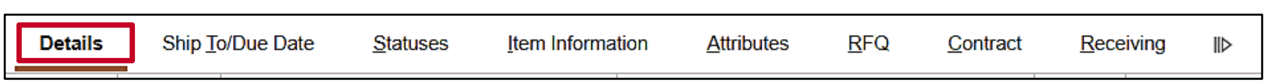
A notification message pops up.



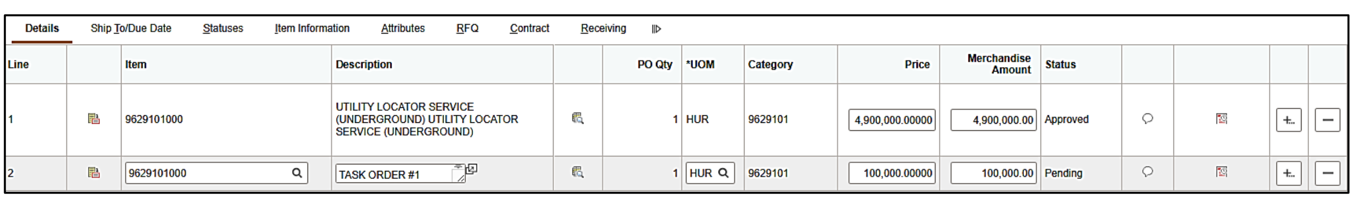
23. Click the **Yes** button.



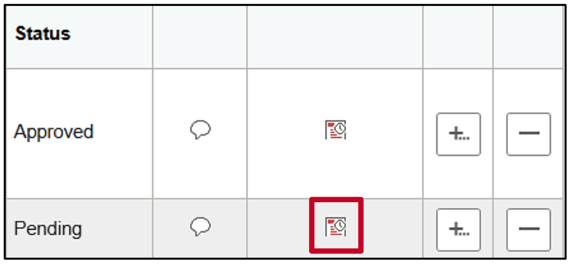
24. Click the **Details** tab.



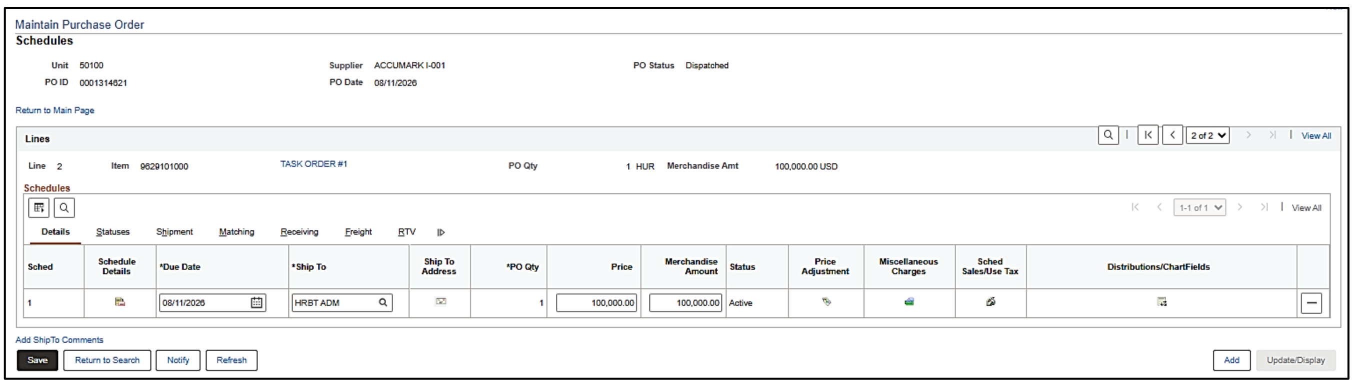
The **Details** tab displays.



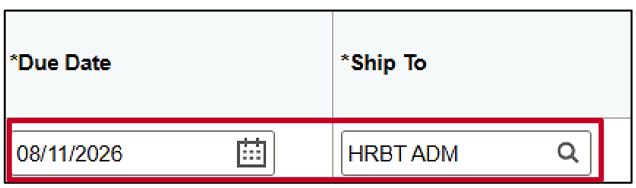
25. On the new line (e.g., **Line 2**), click the **Schedule** icon.



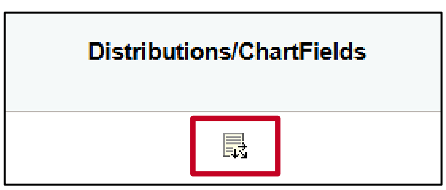
The **Maintain Purchase Order Schedules** page displays.



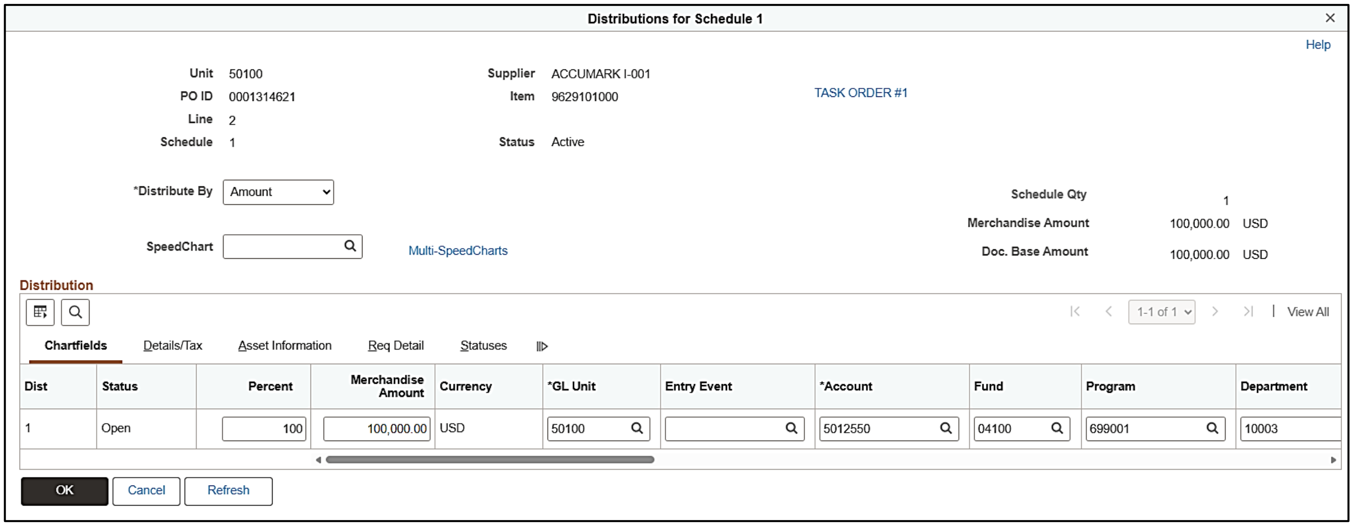
26. Edit the **Due Date** and **Ship To** fields specific to this task order as applicable.



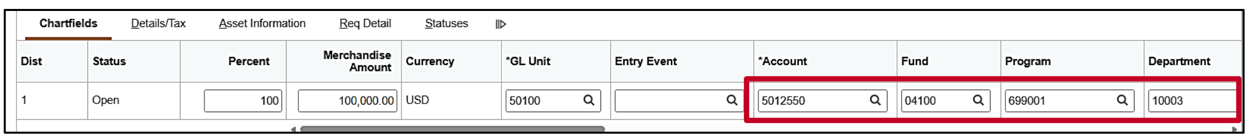
27. Click the **Distribution/ChartFields** icon.

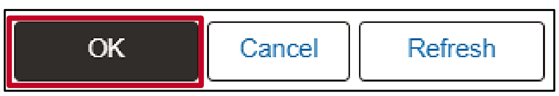


The **Distributions for Schedule 1** page displays in a pop-up window.

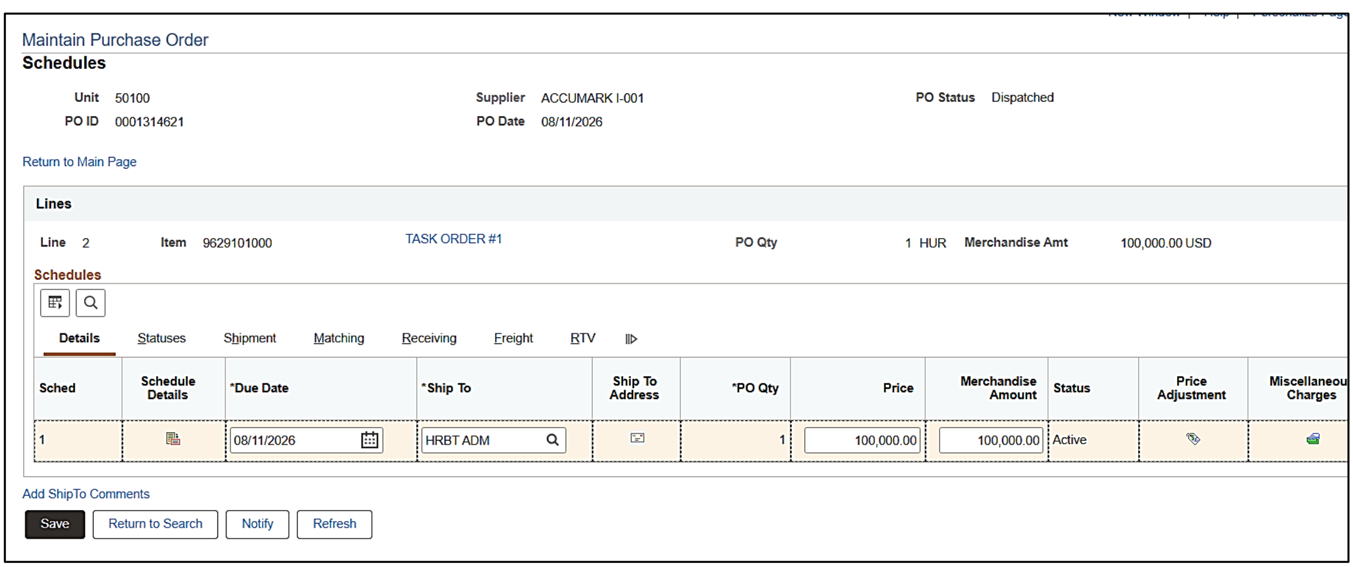


28.	Enter the accounting distribution specific to the task order.
29.	Click the **OK** button.



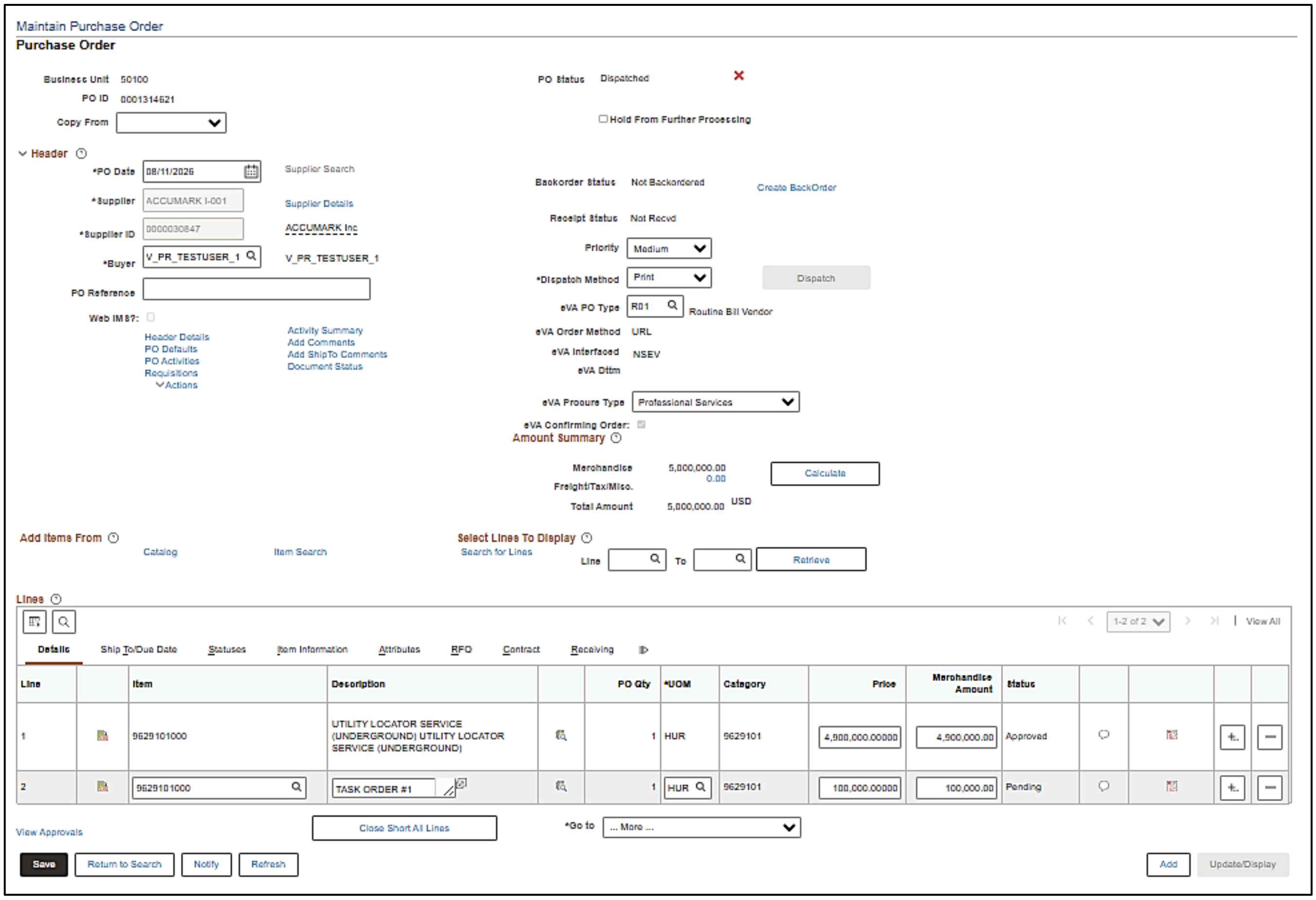


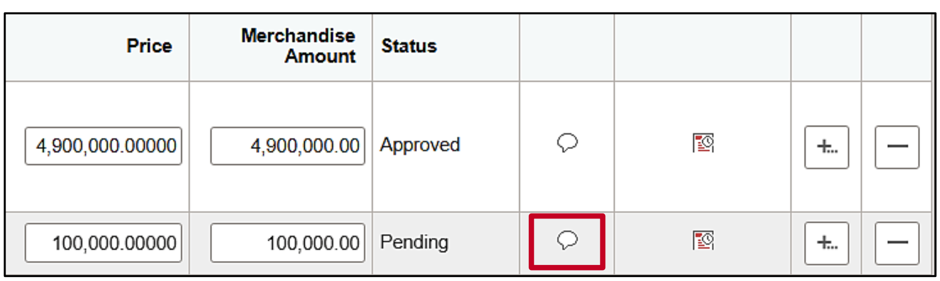
The **Maintain Purchase Order Schedules** page displays.



30.	Click the **Return to Main Page** link. 

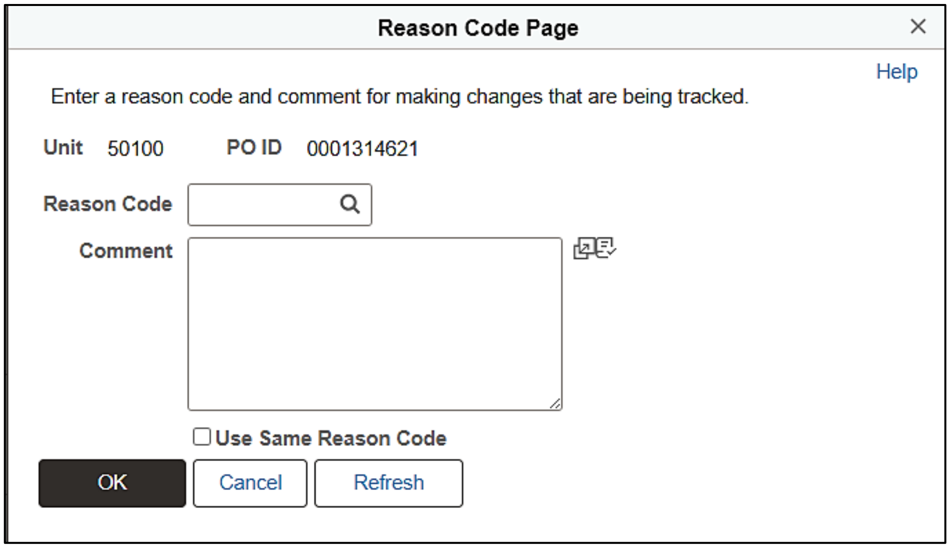
The **Maintain Purchase Order Purchase Order** page displays.



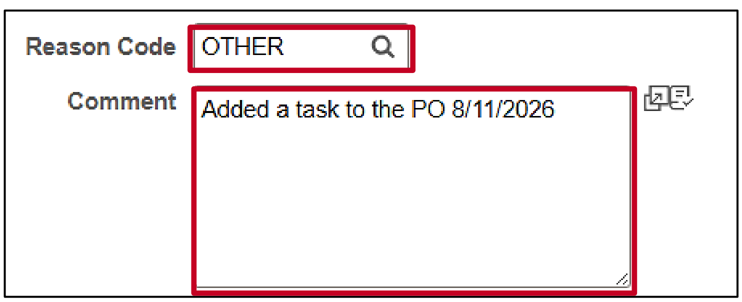
31.	Click the **Comments** icon to add comments and attachments as applicable to the newly added task order line on the PO. 

32. Click the **Save** button.

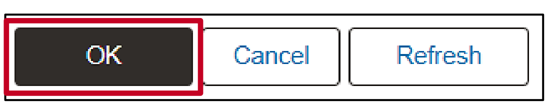
The **Reason Code Page** displays in a pop-up window.



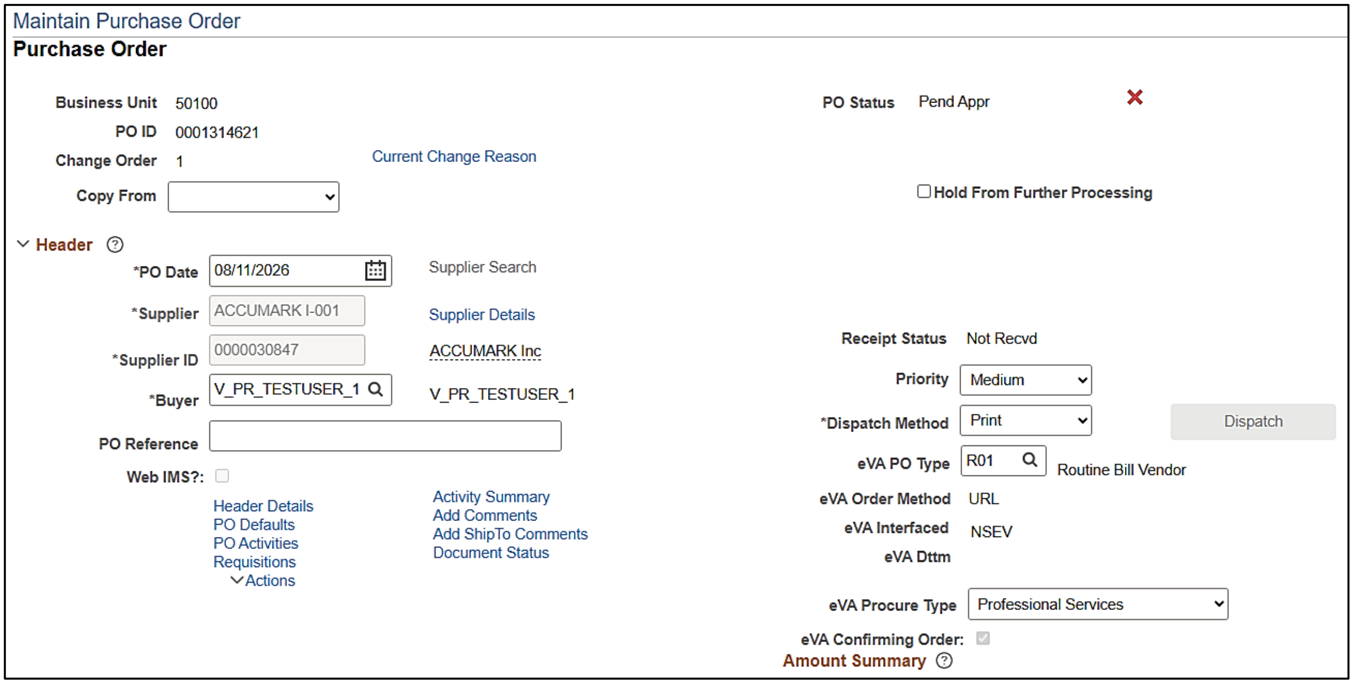
33. Enter values in the **Reason Code** and **Comment** fields.



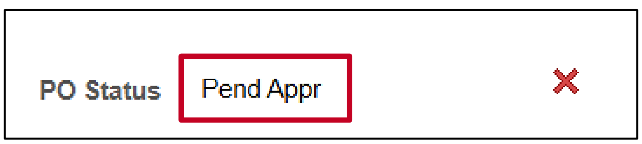
34. Click the **OK** button.



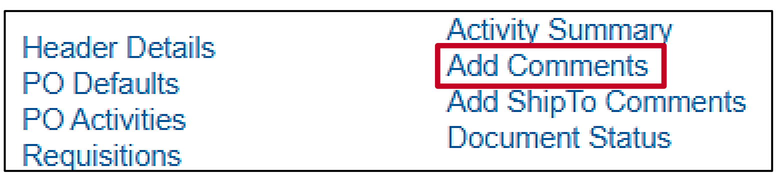
The **Maintain Purchase Order Purchase Order** page displays.



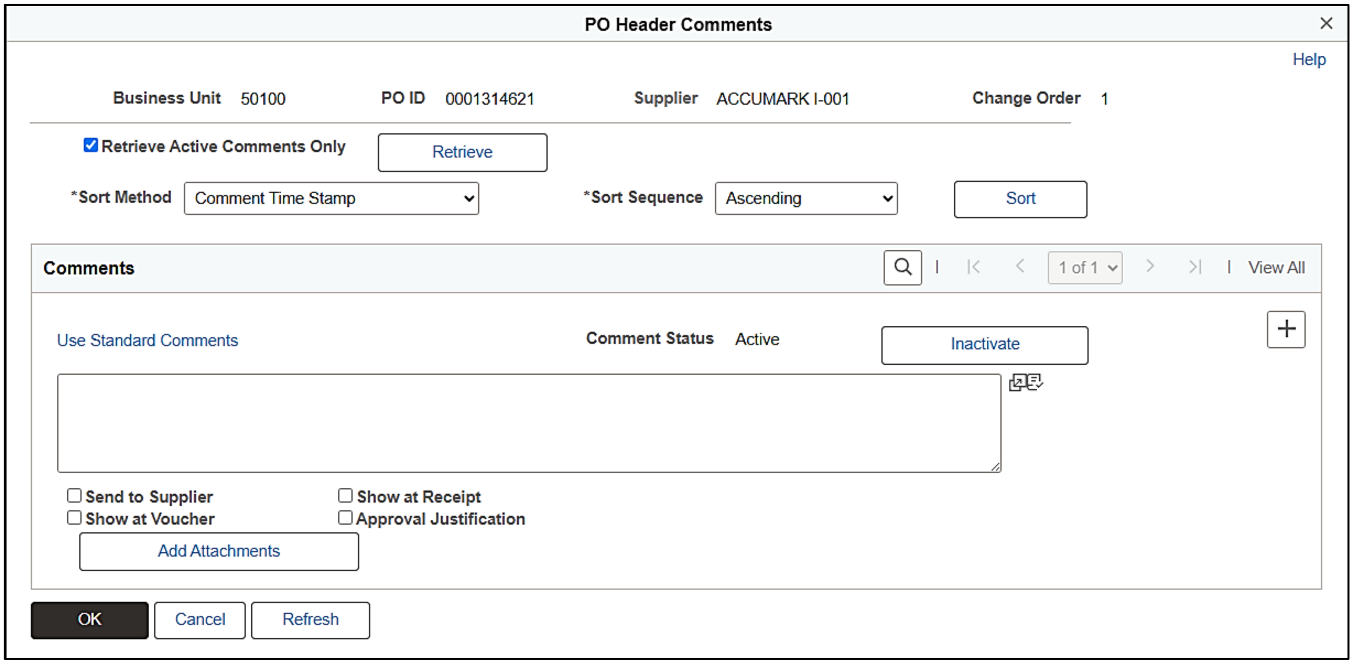
The **PO Status** is updated to **Pend Appr** (i.e., pending approval).



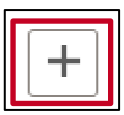
35. Click the **Add Comments/Edit Comments** link to add/edit required comments at the PO level.



The **PO Header Comments** pop-up window displays.

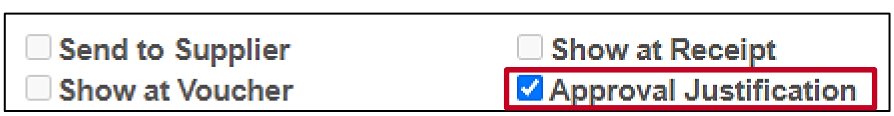


36. Click the **Add a New Row** (**+**) icon to add a new comment if necessary.

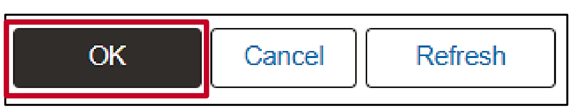


37. Enter comment(s) specific to this task order for approval justification.

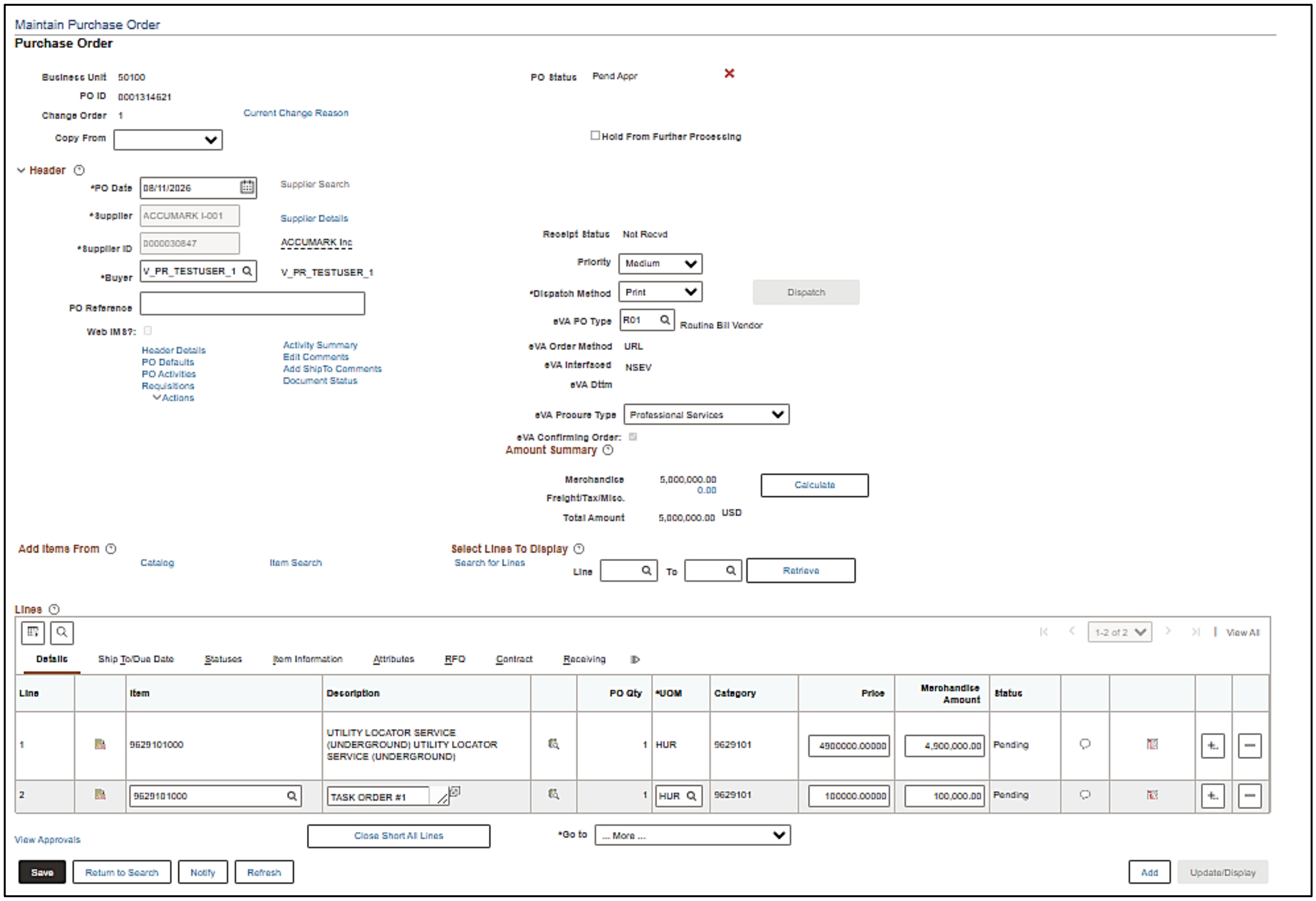
38. Select the **Approval Justification** checkbox option.

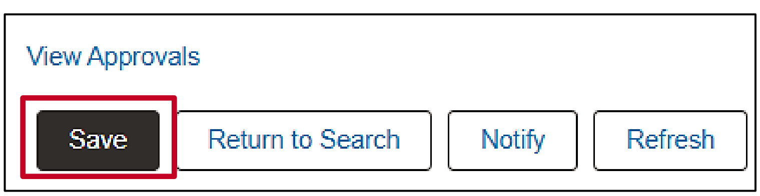


39. Click the **OK** button.

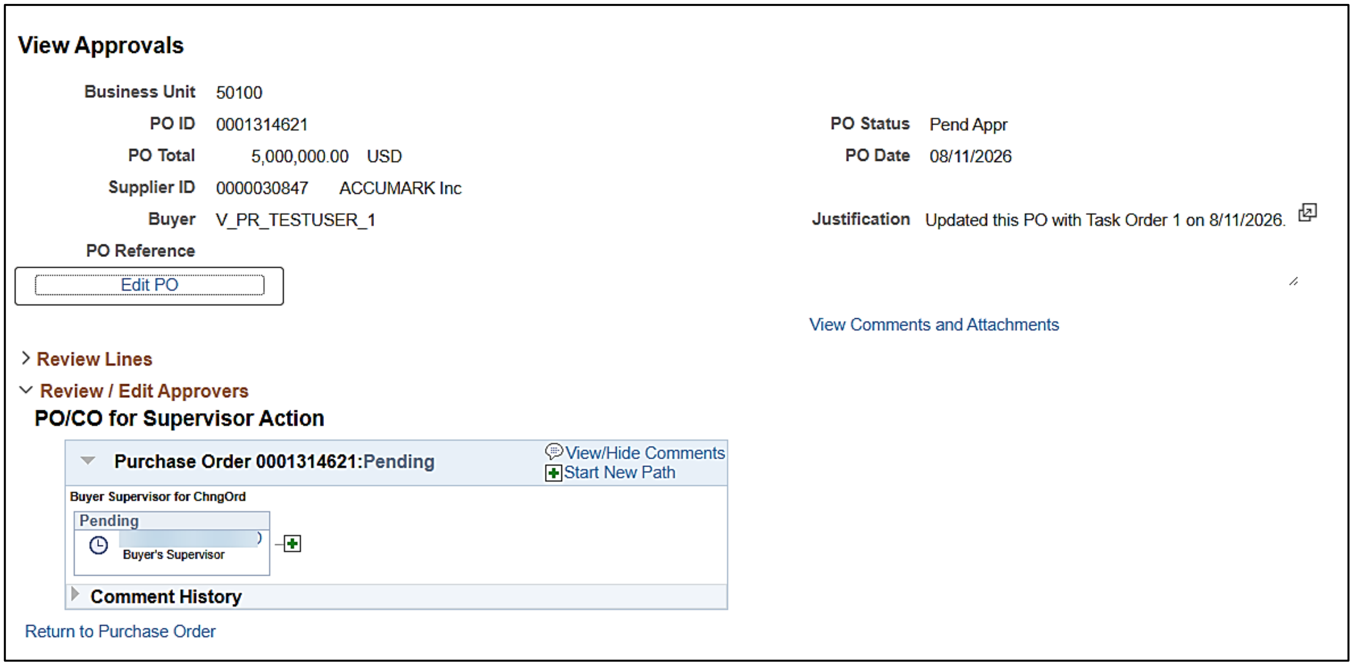


The **Maintain Purchase Order Purchase Order** page displays.



40.	Click the **Save** button. 
	The PO will route to the supervisor for approval. Task order approval is required by the supervisor because there was an insertion of a new task order line.
41.	Click the **View Approvals** link to view the **Justification** comment. 

The **View Approvals** page is shown and the **Justification** comment displays.



ℹ	The PO will continue on through normal PO processing. Once the Purchase Order is dispatched, the PO is complete and ready to accept vouchers.