


Change Order Guide

Change Order Request

Available Actions: Add and go to Cart

Go Close

Instructions ?



Please see the "[Change Order Guide](#)" for guidance on completing this form.

1. Use this form to request:

- A change to a **BearBuy** Purchase Order that has been sent to the supplier
- Closing a PO and removing the lien

NOTE: Chartfield changes on a PO will apply only to future invoices. To request for a chartfield change to a **voucher**, contact **Accounts Payable**. If a PO is already fully or over-invoiced and fully matched, the chartfield of a PO can no longer be changed.

To request changes to **vouchers**, contact **Accounts Payable**.

2. Fill out all required fields shown in **bold text**.

3. Ensure your chartfield combination is valid before submitting a chartfield change. The [SpeedType Search and Chartfield Validator](#) tool can be used to validate chartfields.

4. If you are closing multiple POs **from the same fund/dept ID**, complete and attach [this form](#) to your Change Order form.

WARNING

Do not mix the Change Order Request Form with catalog items or any other form. The BearBuy system will automatically return your

Change Details

PO Number 1

Closed POs or canceled PO lines are not sent to the vendor to avoid order duplication. Contact the vendor directly to cancel your order. 2

Send Change to Vendor?

No 3

Yes

Type of Change 3

If the **PO Total** has changed, enter the new PO total **excluding tax and shipping**. Leave the default value of **\$0.01** if you are closing a PO, changing chartfields, or if the PO total has not changed.

New PO Total 4

Fully and clearly describe the PO changes. For PO close requests, provide an explanation as to why the PO is no longer needed.

Change Request Details

change the unit price to \$150 5

1971 characters remaining expand | clear

Internal Attachments 6

Add Attachments

You are now ready to submit this Change Order Form.

- This form will be routed to your department Requisition Approver regardless of dollar amount
- Your request will then route to Supply Chain Management (SCM) for further processing

For Internal SCM Use Only

Supplier SCM - FOR CHANGE ORDER REQUEST ONLY

Fulfillment Address Fulfillment Address 1:

***WARNING:** Do not mix this form with catalog items or any other BearBuy forms when submitting your request. Your request will be returned to you.

- | | | | |
|---------------------------|-------------------|---------------------------|----------------------|
| 1) PO Number | 3) Type of Change | 5) Change Request Details | 7) Available Actions |
| 2) Send Change to Vendor? | 4) New PO Total | 6) Internal Attachments | 8) Go |

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Instructions

1) PO Number

- Enter the PO number you wish to request a change
- When entering the BearBuy PO Number (i.e. B000099999), verify you entered **all** the digits in the PO number **accurately**. Check for missing digits, transposing of numbers, or a wrong PO number.

2) Send Change to Vendor

- Specify if you would like to send the revised PO to the vendor
- **Choose No**, if you are closing POs, canceling PO lines, requesting chartfield changes, or any other internal changes. Most revised POs will not be sent to vendors. The default value is no.
- **Choose Yes**, ONLY if the vendor requires a copy of the modified PO
- **Note:** We **do not** send closed POs or canceled PO lines to vendors since some vendors duplicate orders instead of canceling. Please **contact the vendor directly to cancel** your item/order. We will process your request to close the PO and remove the liens after the order has been cancelled with the supplier.

3) Type of Change – select the change you wish to request

Please select...	
A	Close Entire PO (and Remove Lien)
B	Cancel PO Line
C	Change Line Quantity
D	Change Unit Price/Amount (Forms Orders Only)
E	Chartfield Change (Account Code)
F	No Cost Extension
G	Re-open PO
H	Other

A. Close Entire PO (and Remove Lien)

- Please choose this if you are **closing your entire PO**.
- Reasons for choosing this option may be the:
 - Items are no longer needed
 - Item(s) backordered too long
 - Item(s) discontinued
 - Vendor canceled the order
 - Wrong vendor was selected
 - Vendor 's new address prevents the vendor from processing the request
 - PO is paid in full (i.e. you paid a lower price than originally stated on the PO and you no longer need the remaining balance of the PO)
- **Do not choose** this drop-down option **if you are moving funds**, choose Chartfield Change and specify new funding
- If you need a PO canceled, please choose this option to have the PO closed

B. Cancel PO Line

- **This is not reversible.** When making this request, confirm that you will not receive an invoice for the item(s).
- Some reasons for canceling PO lines include:
 - You no longer need the item(s)
 - Item(s) is backordered too long
 - Item(s) is discontinued
 - Vendor canceled the item(s)
- If all other PO lines have been invoiced, select Close Entire PO (and Remove Lien) as the type of change instead of cancelling a PO line.

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C. Change Line Quantity

- You may **increase or decrease your PO line quantity**
- If you are decreasing your line quantity to match invoiced quantity, select Close Entire PO (and Remove Lien) instead
- If you are increasing above your delegated authority, your request will be forwarded to a Supply Chain Management (SCM) Buyer for processing
- Requesting a line quantity change will not resolve your match exceptions. Work with your Match Exception Handler to resolve the match exception instead.

D. Change Unit Price/Amount (Non-Catalog Only)

- Increase or decrease the unit price or amount of one or more PO lines
- **Catalog prices cannot be changed**
- If you are lowering the unit price or amount of the PO to match the paid amount, select Close Entire PO (and Remove Lien) instead
- Requesting a change in unit price or amount will not resolve your match exceptions. Work with your Match Exception Handler to resolve the match exception instead.

E. Chartfield Change (Account Code)

- Select this option to request a change to new Fund(s), Project(s), Accounts(s), or other chartfields
- Changes are only made for **future invoices only** and will not change chartfields on pending or paid invoices
- If you have invoices in match exception or voucher approval, please contact Accounts Payable (AP) at SCMAP@ucsf.edu to correct the funding
- Confirm that your Chartfield percentages add up to 100%

F. No Cost Extension

- Extending the project date when there is no change to the amount of the PO

G. Re-open PO

- When selecting this type of change in a PO, you must enter a valid reason for re-opening the PO
- Requests are evaluated and POs are re-opened at SCM's discretion

H. Other

- Choose this option when the requested change is not specified by any other option in the drop-down list
- Examples include:
 - o Changing the PO between taxable and non-taxable
 - o Changing the Payment Terms, Shipping Terms, Net Terms, and clauses
 - o Change description (and resend to vendor)
 - o Adding attachments or external comments
- Unit of Measure (UOM) discrepancies do not cause match exceptions in BearBuy. There is no need to submit a request to change the UOM to resolve a match exception.

4) New PO Total

- The new PO total is the sum of the current PO amount (regardless of invoices applied to the PO) plus the amount it is being increased by. The new PO total is before tax and shipping
- If the PO Total has **changed**, enter the new PO total **excluding tax and shipping**
- **Leave the default value of \$0.01** if:
 - o The PO total has not changed
 - o You are closing a PO

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- You are changing chartfields
- You are requesting any other change that does not affect the PO total

5) Change Request Details - IMPORTANT

- **Fully and clearly describe your changes**
 - If you are not clear in your instructions, your request will be **delayed or returned**
- Provide **reasoning for your change**
- If you are changing the chartfield, you must specify which chartfield is being replaced specially if the PO has multiple chartfields or funding
- If you are closing a PO, you must provide the reason why the PO is being closed. Examples of change descriptions
 - We no longer need the items & the order was cancelled
 - The items are backordered too long
 - Change unit price on PO Line #1 from \$10 to \$12
 - Change quantity on PO Line #2 from 2 to 12
 - Change funds from 1234 to 4567
 - PO Line #3, item is discontinued
 - Extend the project time from end date December 31, 2018 to January 31, 2019

6) Internal Attachments

- If you have documentation to include with your request, please attach the documents to the form

7) Available Actions

- When you have completed your request, select **Add and go to Cart**
- Alternatively, you may add another change order request to the requisition using the **Add to Cart and Return** option

8) Go

- After selecting an option from the Available Actions drop-down, click Go to continue

Submitting your Change Order Request

- **Shoppers** (if a Shopper started the request)
 - Review information for accuracy and completeness
 - Assign the Cart to your Requester to submit
- **Requesters**
 - Review request for accuracy and completeness
 - Click Proceed to Checkout
 - Use the appropriate Procurement Dept Code so it will route to the proper Requisition Approver for approval
 - Use any valid chartfields and Ship-To address to submit the request. These values do not need to match the original PO you are requesting to be changed or closed. These values will not be reviewed or used to complete your request.
- **Requisition Approvers**
 - Review the accuracy of the request
 - Click Approve/Complete Step to submit the request
- After the Requisition Approver approves of the request, CPC receives the request and will manually process or forward the requests as necessary

Important Items to Note:

- 1) Changes (i.e. chartfield changes, quantity or amount changes, etc.) cannot be made on purchase orders that do not contain the new Chart of Account Accounting Code values. Generally, these are POs that were created before early November 2012.
- 2) Change Order requests should be treated like a requisition

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- 3) Do not assign carts with Change Order Requests to SCM Personnel. A Requester must **Proceed to Checkout** and submit the form.
- 4) **Do not mix** a Change Order Request Form with any other form or catalog/punch out item
- 5) If you submitted a request to **Close Entire PO (and Remove Lien)**, please **allow at least two business days after change order completion** for the change to appear in My Reports
- 6) If your PO has been processed by the vendor and you have a Ship To change, your department should contact the vendor directly to correct the address
- 7) Do not submit a Change Order Request to change a Voucher. Please contact Accounts Payable (SCMAP@ucsf.edu) directly to inquire about these changes.
- 8) Do not submit a Change Order Request to change or cancel a Payment Request. Please contact Accounts Payable (SCMAP@ucsf.edu) directly to inquire about these changes.
- 9) If you made a mistake after approval, the Requester may withdraw the request, you may contact the person assigned to the change order, or you can email bearbuy@ucsf.edu.
- 10) Check the status of your Change Order by searching for the requisition number in BearBuy through the Quick Search or Document Search
- 11) Please allow five to seven business days from the date the change order is received for it to be processed by SCM. It may take longer during UCSF's fiscal year end or when there is a high volume of requests.

Completed Change Order Requests

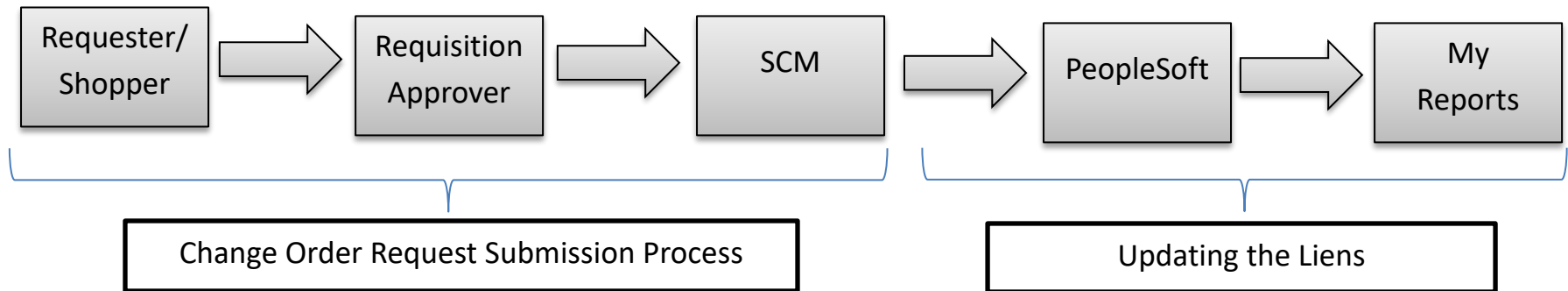
- Once your Change Order Request is completed, your Change Order requisition will be approved.

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Request	Change Order	Cannot Process	Contact	Comment
Quantity				
Change Quantity on Catalog Order		✓	Vendor	Only the vendor can change a catalog quantity
Change Quantity on Forms Order to match paid Invoices		✓		Request Close Entire PO in Change Order instead
Change Quantity on Forms Order with no Invoices	✓			
Change Quantity to resolve a Match Exception		✓	Match Exception Handler	Resolve the match exceptions - no change order necessary
Price/Amount				
Change Price on Catalog Order		✓		
Change Price/Amount on Forms Order to match paid Invoices		✓		Request Close Entire PO in Change Order instead
Change Price on Forms Order with no Invoices	✓			
Increasing Amount on Forms Order	✓			Processed on case-by-case basis
Decrease Amount on Forms Order with no Invoices	✓			
Change Price/Amount to resolve a Match Exception		✓	Match Exception Handler	Resolve the match exceptions – no change order necessary
Chartfield Change				
Vouchers in Match Exception / Voucher Approval (Invoices, Credit Memos, Debit Memos, etc.)		✓	CO Solution Center	AP will evaluate your requests
Vouchers already Paid		✓		You must complete a cost transfer
POs with no Invoices or partially Invoiced	✓			Changes affect future invoices ONLY
POs fully invoiced		✓		
Close PO/Cancel PO Line				
PO is Partially/Fully/Over Invoice and not Matched		✓	Match Exception Handler	ME Handler must resolve the match exceptions before closing PO
PO is Invoiced, but at least one Invoice is not Paid		✓		We ask that you wait for payment before requesting this
Paid Invoice Amount less than PO Amount	✓			You may request closure of PO
Paid Invoice Amount greater than or equal PO Amount	✓			You may request if you need the PO closed earlier than the batch closing process
Cancel PO Line with Invoices with Status "In Process"		✓	Match Exception Handler / Voucher Approver	ME Handler resolves match exceptions or Voucher Approver approves of voucher before requesting PO line cancellation
Other				
Wrong Vendor/Vendor Address Change		✓		Request Close Entire PO and create a new PO
Description/PO Clause/Terms Change	✓			Only request if PO needs to be sent back to vendor
Ship-To/UOM Change on Catalog Orders		✓	Vendor	Vendor already received PO and is processing the order
Ship-To/UOM Change on Forms Orders	✓		Vendor	Contact the vendor before requesting change
Change Tax Status on PO with no Invoice	✓			
Change Tax Status on PO with Invoice in Match Exception		✓	Match Exception Handler	We can only change the PO to affect future invoices ONLY

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Change Order Request Process for PO Close



Sample of Requests

PO Close

Change Order Request Available Actions: Add and go to Cart Go Close

Instructions ?	Change Details ?
<p>Please see the "Change Order Guide" for guidance on completing this form.</p> <p>1. Use this form to request:</p> <ul style="list-style-type: none"> A change to a BearBuy Purchase Order that has been sent to the supplier Closing a PO and removing the lien <p>To request changes to vouchers, contact Accounts Payable.</p> <p>2. Fill out all required fields shown in bold text.</p> <p>3. If you are closing multiple POs, complete and attach this form to your Change Order form.</p>	<p>PO Number: 8000123456</p> <p>Closed POs or canceled PO lines are not sent to the vendor to avoid order duplication. Contact the vendor directly to cancel your order.</p> <p>Send Change to Vendor? <input checked="" type="radio"/> No <input type="radio"/> Yes</p> <p>Type of Change: Close Entire PO (and Remove Lien)</p> <p>If the PO Total has changed, enter the new PO total excluding tax and shipping. Leave the default value of \$0.01 if you are closing a PO, cancelling PO lines, changing chartfields, or if the PO total has not changed.</p> <p>New PO Total: 0.01</p> <p>Fully and clearly describe the PO changes. For PO close requests, provide an explanation as to why the PO is no longer needed.</p> <p>Change Request Details</p> <p>The PO is no longer needed because the items have been discontinued.</p>

Chartfield Change

Change Order Request Available Actions: Add and go to Cart Go Close

Instructions ?	Change Details ?
<p>Please see the "Change Order Guide" for guidance on completing this form.</p> <p>1. Use this form to request:</p> <ul style="list-style-type: none"> A change to a BearBuy Purchase Order that has been sent to the supplier Closing a PO and removing the lien <p>To request changes to vouchers, contact Accounts Payable.</p> <p>2. Fill out all required fields shown in bold text.</p> <p>3. If you are closing multiple POs, complete and attach this form to your Change Order form.</p>	<p>PO Number: 8000654321</p> <p>Closed POs or canceled PO lines are not sent to the vendor to avoid order duplication. Contact the vendor directly to cancel your order.</p> <p>Send Change to Vendor? <input checked="" type="radio"/> No <input type="radio"/> Yes</p> <p>Type of Change: Chartfield Change (Account Code)</p> <p>If the PO Total has changed, enter the new PO total excluding tax and shipping. Leave the default value of \$0.01 if you are closing a PO, cancelling PO lines, changing chartfields, or if the PO total has not changed.</p> <p>New PO Total: 0.01</p> <p>Fully and clearly describe the PO changes. For PO close requests, provide an explanation as to why the PO is no longer needed.</p> <p>Change Request Details</p> <p>Please change the Fund, Department ID, and Activity Period because the current funding has expired. Change the existing Fund and Department ID from 1234-654321-01 to the following funds: 50% - 4567-987654-01 50% - 8910-123456-02</p>