# Change Order Guide

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 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.

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**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.

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<tr>
<th>Instruction</th>
<th>PO Number</th>
<th>Send Change to Vendor?</th>
<th>Type of Change</th>
<th>New PO Total</th>
<th>Change Request Details</th>
<th>Internal Attachments</th>
<th>Available Actions</th>
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</tbody>
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For Internal SCM Use Only

<table>
<thead>
<tr>
<th>Supplier</th>
<th>SCG - FOR CHANGE ORDER REQUEST ONLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>Fulfillment Address 1:</td>
</tr>
</tbody>
</table>

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Change Order Guide Apr 2019
**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. 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

   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.
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:
     - Changing the PO between taxable and non-taxable
     - Changing the Payment Terms, Shipping Terms, Net Terms, and clauses
     - Change description (and resend to vendor)
     - 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:**
     - The PO total has not changed
     - You are closing a PO
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

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**Submit 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

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**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
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.
## Change Order Guide

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

1. Requester/Shopper
2. Requisition Approver
3. SCM
4. PeopleSoft
5. My Reports

Change Order Request Submission Process

Updating the Liens

Sample of Requests

PO Close

<table>
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<tr>
<th>Change Order Request</th>
<th>Change Details</th>
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</thead>
<tbody>
<tr>
<td>Available Actions:</td>
<td>Add and go to Cart</td>
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</tbody>
</table>

- **PO Number**: B020123-456
- **Closed POs or canceled PO lines are not sent to the vendor to avoid order duplication. Contact the vendor directly to cancel your order.**
- **Send Change to Vendor?**
  - No
  - Yes
- **Type of Change**
  - Close Entire PO (and Remove Lines)
- **New PO Total**: 0.01
- **Fully and clearly describe the PO changes. For PO close requests, provide an explanation as to why the PO is no longer needed.**
  - The PO is no longer needed because the items have been discontinued.

Chartfield Change

<table>
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<tr>
<th>Change Order Request</th>
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</thead>
<tbody>
<tr>
<td>Available Actions:</td>
<td>Add and go to Cart</td>
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</table>

- **PO Number**: B002654321
- **Closed POs or canceled PO lines are not sent to the vendor to avoid order duplication. Contact the vendor directly to cancel your order.**
- **Send Change to Vendor?**
  - No
  - Yes
- **Type of Change**
  - Chartfield Change (Account Code)
- **New PO Total**: 0.01
- **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**
  - Please change the Fund, Department ID, and Activity Period because the current funding has expired. Change the existing Fund and Department ID from 1234-456789 to 01. The following funds:
    - 50% - 4567-98765-01
    - 50% - 8910-123456-02