Single Accounting Distribution
Instructions for Completing Change Order Request Form
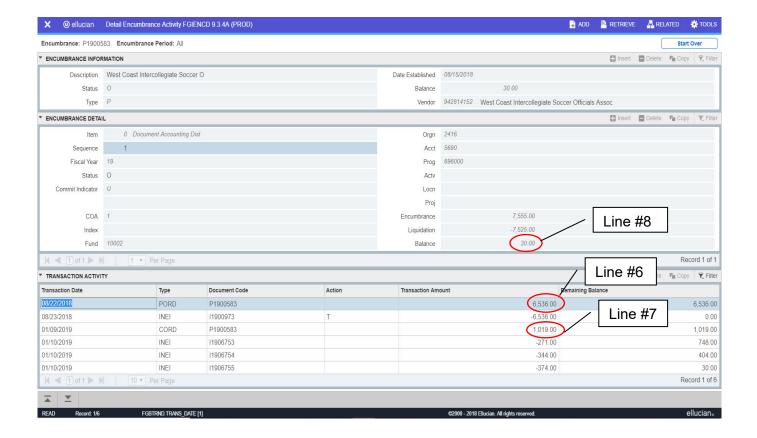
Use this form to request a Change Order on a Purchase Order which has only one accounting distribution (FOAP) and one sequence. If you will be increasing and/or decreasing more than one line item be sure to complete a new form for each additional line item. This form can be found on the Purchasing/General Services Downloads page under Change Order Request Forms and Instructions.

A "Change Order Request Form" must be submitted if any one of the following changes are required on a Purchase Order (1) increase the dollar amount, (2) decrease the dollar amount, or (3) change the accounting distribution (FOAP). For additional line items submit a separate change order form. If there is an agreement in place, be sure to verify that the change order does not exceed the agreement amount. If it does, please contact the Business Office.

Once completed, this form must be forwarded to your District Buyer via email and placed in the Change Orders folder \\appserv1\purchasing\Backups\Change Orders (be sure to copy your Approver, Budget Officer and Accounts Payable personnel on the email).

STEP 1. Verify your account's budget availability (**FGIBAVL**) and if necessary, complete a budget transfer (**FGAJVCD**).

STEP 2. Go to the *Detail Encumbrance Activity* screen (**FGIENCD**), enter your Purchase Order number in the *Encumbrance* field and **Press GO or ALT + Page Down** to view the Purchase Order's current activity.

Note: If you do not know the Purchase Order number go to **FOIDOCH**, enter your Requisition number and **Press GO or ALT + Page Down** to display the corresponding document numbers.

To view additional details for any of the transactions listed, place your cursor in the *Transaction Date* field for that line entry, go to the *Related* menu and select **Query Document** and **Press GO or ALT + Page Down** to view through the document.

STEP 3.   Complete the *Change Order Request Form* as outlined below:

Line 1.   Enter the Date of Request.

Line 2.   Enter the Purchase Order number.

Line 3.   Enter the name of the vendor.

Line 4.   Enter the *current* accounting distribution (FOAP) as shown on the FGIENCD screen.

Line 5.   If applicable, enter the *new* accounting distribution (FOAP); complete this line ONLY if you wish to *change* the account charged on the Purchase Order.

Line 6.   Enter the *original* Purchase Order Amount; this is available on FGIENCD under the transaction listing with the type code of "PORD."

Line 7.   If applicable, enter the dollar total of any *previous* change orders; this is available on FGIENCD under the transaction listing with the type code of "CORD." Be sure to include all increase and decrease change orders.

Line 8.   Enter the *Current* Purchase Order Balance; this is available on FGIENCD under the heading Encumbrance Information.

Line 9.   If applicable, reference the line item # you wish to *increase* and then enter the amount you wish to **INCREASE** the Purchase Order.

Line 10.   If applicable, reference the line item # you wish to *decrease* and then enter the amount you wish to **DECREASE** the Purchase Order.

Line 11.   This field will ***automatically*** calculate to reflect the **New Purchase Order Balance** (the sum of Lines 8, 9 and 10). Please do NOT enter *anything* in this cell.

Line 12.   This field will ***automatically*** calculate to reflect the **New Purchase Order Amount** (the sum of Lines 6, 7, 9 and 10). Please do NOT enter *anything* in this cell.

Line 13.   Enter the reason for this change order.

Line 14.   Enter the Requestor's name (normally the person who created the Change Order).

Line 15.   Enter your College/Department.

Line 16.   The requestor must have someone at the managerial level sign the Change Order Request Form. This needs to be a digital or wet signature.

This completed change order must be forwarded to your District Buyer via email and placed in the Change Orders folder \\appserv1\purchasing\Backups\Change Orders (be sure to copy your Approver, Budget Officer and Accounts Payable personnel on the email).

Form Sample

SAN MATEO COUNTY
COMMUNITY
COLLEGE DISTRICT

Cañada College • College of San Mateo • Skyline College

Change Order Request Form
Single Accounting Distribution (FOAP)

Use this form to request a Change Order on a Purchase Order which has only one accounting distribution (FOAP) and one sequence. If you will be increasing and/or decreasing more than one line item be sure to complete a new form for each additional line item.

Instructions:

(1) Check your budget availability (FGIBAVL) before completing this request.
(2) Review your Purchase Order's encumbrance balance (FGIENCD) to be certain that it is NOT in deficit. If sufficient budget is available and your PO isn't in deficit, proceed with request.

1. Date of Request:
2. Purchase Order Number:
3. Name of Vendor:

Accounting Distribution Information   **[Fund-Org-Acct-Program]**

4. *Current* Accounting Distribution (FOAP):
5. **NEW** Accounting Distribution (FOAP):   *(if applicable)*

Historical Financial Information *(use FGIENCD to view previous changes)*

6. *Original* Purchase Order Amount (PORD):
7. Previous Change Order(s) (CORD):   *(if applicable)*

8. *Current* Purchase Order Balance (FGIENCD):

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*Submit a separate Single Accounting Distribution Change Order Request form for each additional Line Item.

9. **INCREASE** Line Item # _____ by:
10. **DECREASE** Line Item # _____ by:
11. **NEW** Purchase Order Balance (FGIENCD):   **$ 0.00**
   (Current PO Balance +/- This Change Order)

12. **NEW Purchase Order Amount:**   **$ 0.00**
   Original Purchase Order Amount (PORD): +/- Previous Change Order(s) +/- this Change Order)

13. **Reason For Change:**

14. Requested by:
15. College/Department:

16. Managerial Approval:

Revised: June 2019