



# **SAN JOSÉ STATE UNIVERSITY**

## **Change Order Request**

## Overview

This business process guide demonstrates how to make a change order request. The purpose of a change order request is to make official changes to an existing purchase order (PO). POs are identified by their identification number and also by the line number. If a PO only has one line, it is understood that any changes will involve that one line. However, if a PO has more than one line, you will need to identify which line you are requesting the changes for.

## Change Order Actions:

Department users can submit a change order request for any of the following actions:

- **Clear an open encumbrance:** Used when PO items have been paid for, but there is a remaining open encumbrance on the Cognos report and the **CSU PO Remaining Balance** page.
- **Cancel a PO in its entirety:** Used only if the PO has not had receipts or invoices entered against it.  
*Note: Once a receipt or invoice has been entered against a PO line, the PO cannot be closed in its entirety. It can only be closed for the remaining open amount because there has been activity deducted against it.*
- **Cancel a PO line in its entirety:** Used only when receipts and/or invoices have not been entered against this line.
- **Increase or decrease a PO line:** Used to change the not-to-exceed amount of a blanket PO.  
*Note: A PO line cannot be decreased for an amount less what remains open, that is, consideration must be given to receipts or invoices entered against the line.*
- **Change the description or specification of a PO line:** Used to change item description.
- **Change unit price or number of units on a PO line:** Use to change quantity and/or unit price.

*Note: The from amounts and to amounts must be specified. For example, "Please change line 5 from \$7.00 per unit to \$8.25 per unit" or "Please change line 6 from 3 units to 5 units."*

- **Close the remaining open encumbrance on a PO or Blanket PO:** Remember to verify that all invoices have been received and entered against the PO. If there is an outstanding invoice, remember to deduct the amount from the current open encumbrance balance.

For example, if a PO has an open encumbrance of \$600.50, but there is still an outstanding invoice for \$150.30, request that the PO line be reduced by \$450.20 so that the invoice can be paid once it is received.

- **Add a new PO line:** Used to add additional lines.
- **Cancel a PO line with incorrect ChartFields and create a new line with the correct ChartFields:** Once a PO line has been created, the system will not allow any ChartFields changes. Corrections to Chartfields are made by cancelling the PO line entirely and then adding a new line with the correct ChartFields.

*Notes: PO lines cannot be cancelled if any receipts or invoices have been posted. Check PO ChartFields (before line has been received or invoiced) to make sure expenses go to the correct ChartFields. The Account code will not always be changed due to CSU reporting requirements.*

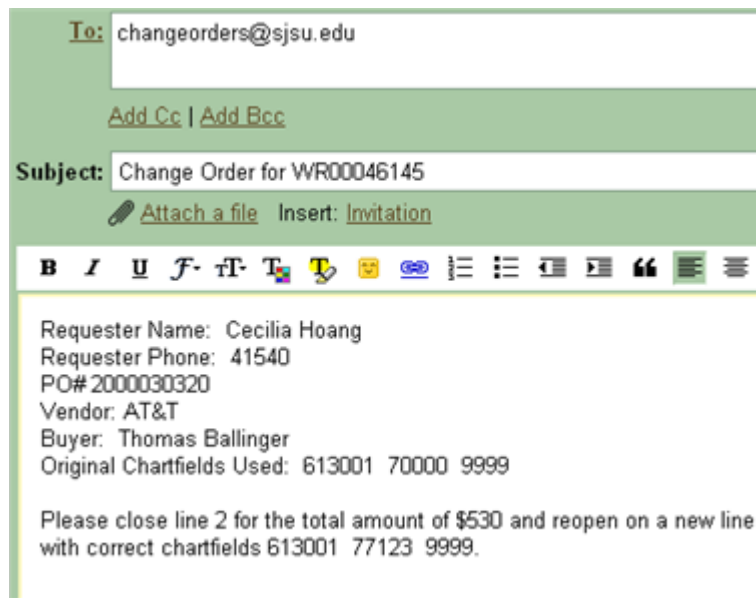
- If the PO line has not been received or invoiced, request that the line be closed in its entirety and a new line created with the same information except using the correct ChartFields.
- If the PO line has been received or invoiced in full, you cannot change ChartFields. Instead, transfer the expense by entering a **Web Expense Journal Transfer** in the Finance Web Component.
- If the PO line has been partially received or invoiced, request the PO line be closed by the remaining open amount, and a new PO line created for the remaining open amount with the correct ChartField. As for the expense for items already posted, transfer the expense by entering a **Web Expense Journal Transfer** in the Finance Web Component. For example, Line 8 on the PO had an original amount of \$800. Invoices totaling \$450 have been entered against the line leaving an open encumbrance of \$350. Request that line 8 be decreased by \$350 and a new line be created for the same item in the amount of \$350 for the new ChartFields. Then, access the Finance Web Component Expense Transfer and transfer the expense to the correct ChartField.





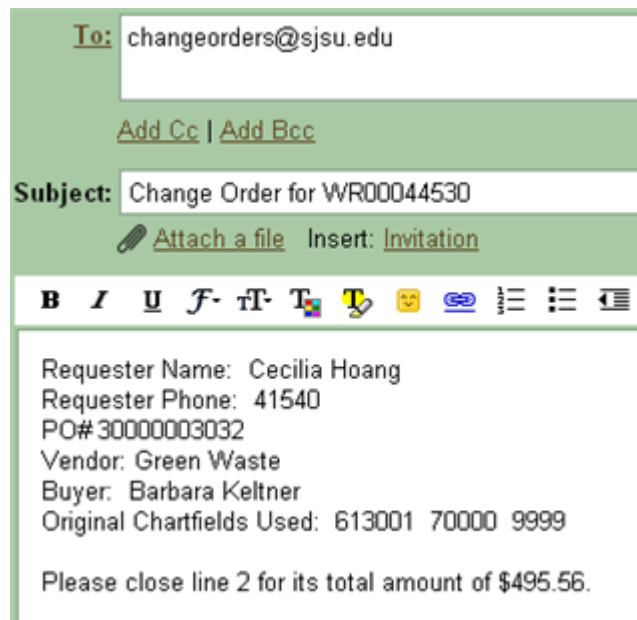
**Action Example 3:  
Close PO line with incorrect  
ChartFields and reopen  
with correct ChartFields:**

- 6. To change ChartFields, write your action request similar to the following example:
  - Please close line 2 for its total amount of \$530 and reopen a new line with correct ChartFields 613001-77123-9999 for the same total amount.



**Action Example 4:  
Close a PO line in its  
entirety:**

- 7. To close a PO line in its entirety, write your action request similar to the following example:
  - Please close line 2 for its total amount of \$495.56.



**Action Example 5:  
Close a PO with partial  
encumbrance remaining:**

8. To close the remaining open encumbrance on a PO or blanket PO, write your action request similar to the following example:

- Please close line 2 for its remaining amount of \$120.60.
- Original line amount is \$240.62.
- New line amount will be \$120.02.

The screenshot shows an email composition window with the following content:

**To:** changeorders@sjsu.edu

[Add Cc](#) | [Add Bcc](#)

**Subject:** Change Order for WR00044530

[Attach a file](#) Insert: [Invitation](#)

**B I U F- rT T** [Icons for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Quote, Unquote, Link, Unlink, Spell Check, and Placeholder]

Requester Name: Cecilia Hoang  
 Requester Phone: 41540  
 PO# 30000003032  
 Vendor: Clean Source Inc.  
 Buyer: Karen McCall  
 Original Chartfields Used: 613001 70000 9999

Please close line 2 for its remaining amount of \$120.60. Original line amount is \$240.62, new line amount will be \$120.02

9. **Additional Comments:** Enter any other changes, notes or comments.

*Note: No matter how insignificant you think a bit of information is, include it in your email. This helps the Buyer understand what changes need to be made and it will expedite the processing of the Change Order.*

10. **Send Change Order Request Email:** Click Send.

*Note: The email must be sent from the Approving Official. If you are not the Approving Official, please send your email to the Approving Official and have that person forward it to the Change Orders Inbox ([changeorders@sjsu.edu](mailto:changeorders@sjsu.edu)).*

- **Processing Time:** Change order requests containing all required information and with proper approval will be processed in the order received within five (5) to seven (7) business days.

*Note: All increases that bring a PO or Requisition to a value greater than \$50,000 are subject to verification of funds and additional approval by Accounting Services.*

- **Confirmation:** After Purchasing has processed the change order request, the requestor (as listed in the request) will receive an electronic confirmation in the form of a copy of the revised PO or an email confirming the action taken (i.e., your requisition has been cancelled).
- **Help:** If you have questions concerning your Change Order request, contact the Buyer listed on the original PO. If you have general questions or need training assistance contact Amy Chan, PASS Liaison/Trainer at 408-924-1538, or the CMS Help Desk (CMSHelp@sjsu.edu) at 408-924-1530.