

Department Buyer Change Order Process for Goods & Services

NOTE: This Change Order Matrix is a summary of the steps involved in making the following changes to a PO. This matrix does not include all required steps. Please see the *Managing POs Manual* for the full process.

\$ Amount of PO:	<\$5,000	>\$5,000 **	Any \$ Amount
Buyer of Record:	Dept Buyer	Dept Buyer	CPBC Buyer
Cancel entire PO	<ul style="list-style-type: none"> Inform Requester of change Add applicable comments to go to Vendor and Receiver: <ul style="list-style-type: none"> PO line# Quantity and/or Amount changes Cancel entire PO 	<ul style="list-style-type: none"> Inform Requester of change Add applicable comments to go to Vendor and Receiver: <ul style="list-style-type: none"> PO line# Quantity changes Update Buyer ID to SFMATPUR and Save Notify purchasing@ucsf.edu 	<ul style="list-style-type: none"> Inform Requester of change Complete online Change Order Request Form and email to purchasing@ucsf.edu
Individual line changes such as: -Cancel line -Decrease/Increase Quantity -Decrease/Increase Amount -Change line due to Match Exception	<ul style="list-style-type: none"> Inform Requester of change Add applicable comments to go to Vendor and Receiver: <ul style="list-style-type: none"> PO line# Quantity and/or Amount changes Make changes to PO and update status to Pending (PO status updates to Approved at next scheduled PO Approval Workflow) 	<ul style="list-style-type: none"> Inform Requester of change Add applicable comments to go to Vendor and Receiver: <ul style="list-style-type: none"> PO line# Quantity changes Update Buyer ID to SFMATPUR and Save Make changes to PO Notify purchasing@ucsf.edu 	<ul style="list-style-type: none"> Inform Requester of change Complete online Change Order Request Form and email to purchasing@ucsf.edu
Change Ship-To	<ul style="list-style-type: none"> Attach approval email from Requester* Add applicable comments to go to Vendor and Receiver: <ul style="list-style-type: none"> PO line# Ship-To changes Make changes to PO and update status to Pending (PO status updates to Approved at next scheduled PO Approval Workflow) 	<ul style="list-style-type: none"> Attach approval email from Requester* Add applicable comments to go to Vendor and Receiver: <ul style="list-style-type: none"> PO line# Ship-To changes Update Buyer ID to SFMATPUR and Save Make changes to PO Notify purchasing@ucsf.edu 	<ul style="list-style-type: none"> Complete online Change Order Request Form, email to purchasing@ucsf.edu, and attach approval email from Requester*
Update Chartfields	<ul style="list-style-type: none"> Attach approval email from Default Approver* Add applicable comments to go to voucher: <ul style="list-style-type: none"> PO line# Chartfield changes Make changes to PO (Change Order not created) 	<ul style="list-style-type: none"> Attach approval email from Default Approver* Add applicable comments to go to voucher: <ul style="list-style-type: none"> PO line# Chartfield changes Update Buyer ID to SFMATPUR and Save Make changes to PO (Change Order not created) Notify purchasing@ucsf.edu 	<ul style="list-style-type: none"> Complete online Change Order Request Form, email to purchasing@ucsf.edu, and attach approval email from Default Approver*

*If Dept Buyer is also the **Requester**, the attached email approval must be from the **Default Approver**

*If Dept Buyer is also the **Default Approver**, the attached email approval must be from a higher level of fiscal responsibility in the department (i.e., Finance Mgr or MSO).

** If Original PO is <\$5000, but change order increased to >\$5000 and Department Buyer is the Buyer of Record