

Instructions for Preparation of University of Hawaii
Hard Copy Purchase Order Change Form

a. General Guidelines

The purchase order change form (POCF) should be issued to a vendor when there are any material changes to the original order, where the change to the original order will result in a purchase which exceeds the limits of a fiscal officer's purchasing authority, and/or to record changes to the accounting data.

Copies of the POCF should be distributed as follows:

- Vendor
- OPRPM
- Requisitioner
- Fiscal Officer
- Disbursing

b. Completion Instructions

All fields must be completed unless noted as optional.

- | | |
|--------------------------|------------------------------------------------------------------------------|
| 1) Campus | Enter Campus Code originally indicated on the purchase order. |
| 2) Department | Enter organization for which the purchase was made. |
| 3) Vendor | Enter name and address of vendor to whom original purchase order was issued. |
| 4) Date of Change | Enter date form is prepared (mm/dd/yy). |
| 5) Purchase Order Number | Enter original purchase order number that is to be changed. |
| 6) Requisition Number | Enter requisition number that initiated original purchase (if applicable). |
| 7) Vendor Code | Leave vendor code blank. |

- 8) Requisitioner/Tel. No. Enter requisitioner's name and telephone number.
- 9) Type of Change Place "X" in the appropriate box(es). Note: If change is internal to the University **only** e.g. account code and/or object code distribution, POCF should **not** be sent to vendor.
- 10) Original Order Reads Enter text as originally appeared in these fields on the purchase order.
- . Item No.
 - . Quantity
 - . Description
 - . Object Code
 - . Unit Price
 - . Amount
- 11) Change Order To Read Enter changes to these fields as applicable.
- . Item No.
 - . Quantity
 - . Description
 - . Object Code
 - . Unit Price
 - . Amount
- If there is an increase in the total amount of the purchase order which would exceed the fiscal officer's delegated authority, the change order shall be sent to a designated departmental fiscal officer with greater purchasing authority or to OPRPM, as applicable, for approval. For modifications, list items to be changed as they should appear. For partial cancellations, list items to be cancelled. For total cancellations, indicate that the order is totally cancelled.
- 12) Net Change Enter net change in amount resulting from this purchase order change (difference between original amount and changed amount) then check whether this amount is an increase or a

decrease. If there is no change to the amount, enter -0-.

- | | |
|-------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 13) Summary of Account Code/Object Code Changes | Enter detailed changes to account code/object code distribution. Net summary of debit (increase) and credit (decrease) amounts should be equal to Item 12, Net Change. |
| 13a) Account Code | Enter appropriate 6-digit account code. |
| 13b) Object | Enter appropriate 4-digit object code. |
| 13c) Amount | Enter encumbrance adjustment amount. |
| 13d) Debit (D)/
Credit (C) | Enter "D" for Debit to denote an increase to an account code/object code distribution or "C" for Credit to denote a decrease to an account code/object code distribution. |
| 14) Reason for Change | Enter concise reason why the change is necessary. |
| 15) Approving Authority/
Title | Signature of individual (including title) authorized to certify that the purchase order change supports program objectives. |
| 16) Purchasing Officer
Signature/Date | Signature of the appropriate Purchasing Officer from a University program or from the Office of Procurement and Real Property Management. |
| 17) Fiscal Officer/
FO Code No. | Signature of Fiscal Officer authorized to certify as to availability of funds for the account code(s) cited and as to compliance with applicable |

University policies and procedures. Include appropriate F.O. code number. If Fiscal Officer is the same as Purchasing Officer, it is not necessary to sign here.

18) Copy For

- Vendor
- OPRPM
- Fiscal Officer
- Requisitioner
- Disbursing Office

Make copies of the completed Purchase Order Change form, check appropriate boxes for distribution to affected parties, and then distribute accordingly.