

Carbondale Campus End User Instructions FORM – Purchase Order Revision Request

Use: To request adjustment to the encumbered amount of a purchase order; to request a change to the Budget Purpose and/or Departmental Activity of the order; and/or to request a change to Item Descriptions. This form may not be used to change a supplier. A change in supplier necessitates a new purchase order. This form can also be used to change the coding.

Access: Access the form via the E-forms web site (<http://eforms.siu.edu/>). Adobe Reader must be installed on your computer.

Instructions: Complete the form using the following instructions: (Unless noted, all fields are **REQUIRED**.)

Header Information Section: Provide basic contact information.

*Procurement Services
Use Box*

Leave blank; for Procurement Services use only.

Preparer Name

Name of the person preparing the revision request.

*Preparer Phone
Number*

Preparer's telephone number.

*Preparer E-mail
Address*

Preparer's electronic mail address.

*Date of Revision
Request*

Date of this revision request. (Format DD Mmm YYYY). The system will automatically enter the current date. (Not Required)

*Purchase Order
Number*

Number of the Purchase Order to be revised.

PO Revision Number

Number of this revision corresponding to the Purchase Order.

Supplier Name

Supplier's name as listed on the Purchase Order.

Fiscal Year

Fiscal year of the Purchase Order. (i.e., 2005, 2006)

*Reason for Revision
Request*

Detail the reasons for this revision request.

Purchase Order Revision Form

Encumbrance Adjustment Section: Use this section to adjust the encumbered amount of a line an AIS purchase order. If adjusting the encumbered amount of more than one line, an additional Encumbrance Adjustment Section can be found on Page 2 of the form.

Line Item No. Enter the line item number of the item to be adjusted.

Increase Purchase Order Total Encumbrance By

If requesting an increase to the original encumbered amount of the Purchase Order, enter the dollar amount which corresponds to the exact amount by which you want to increase the purchase order.

Decrease Purchase Order Total Encumbrance By

If requesting a decrease to the original encumbered amount of the Purchase Order, enter the dollar amount which corresponds to the exact amount by which you want to decrease the purchase order.

Cancel Purchase Order Encumbrance

If requesting that a Purchase Order encumbrance be cancelled, enter the dollar amount which corresponds to the exact amount remaining in encumbrance on the purchase order.

Adjusted Balance of Purchase Order

Enter the total of the purchase order after adjustments. This figure can be derived by taking the original encumbrance of the purchase order plus any increases less any decreases. For Cancellations, the Adjusted Balance will be "-0-".

Charge Account Information Section: Use this section to change the Budget Purpose, the Department Activity 1, and/or the Department Activity 2 Values of the Accounting Flexfield of a line of an AIS Purchase Order. If changing the account information of more than one line, an additional Change Account Information Section can be found on Page 2 of the form.

Line Item No. Enter the line item number of the item to be adjusted.

Change Budget Purpose Value

- From: Enter the Budget Purpose value which was originally charged within the Accounting Flexfield.
- To: Enter the new Budget Purpose value to which the Accounting Flexfield should be changed.

****NOTE:** When changing the Budget Purpose value, the Fiscal Officer of the originally charged Budget Purpose and the new Budget Purpose must be the same.

Purchase Order Revision Form

Change Department Activity 1 Value

- From: Enter the Department Activity 1 value which was originally charged within the Accounting Flexfield.
- To: Enter the new Department Activity 1 value to which the Accounting Flexfield should be changed.

Change Department Activity 2 Value

- From: Enter the Department Activity 2 value which was originally charged within the Accounting Flexfield.
- To: Enter the new Department Activity 2 value to which the Accounting Flexfield should be changed.

Change Description of Item Section: Use this section to change the description of the AIS Purchase Order item. If changing the description of more than one item, an additional Change Description of Item Section can be found on Page 2 of the form.

Line Item No. Enter the line item number of the item to be adjusted.

Change Item Description to Read New/revised item description for the purchase order.

Other:

Notes to Buyer Optional; provide any additional information of use to the process; attach sheets as necessary.

Fiscal Officer Approval And Date Signature of fiscal officer is required. Please include date of signature.

Fiscal Officer Email Address (PRINT or TYPE) (Required) Provide the email address of the Fiscal Officer. Must be printed or typed.

Vice Chancellor Approval And Date Signature of the appropriate Vice Chancellor is required on all purchase order encumbrance increases. Please include date of signature.

Routing: Print this form, have the fiscal officer sign it, and mail it to:

Procurement Services, Mail Code, 6813.

**** If page 2 was not used/needed, the printing of page 2 is not required.****