

Santa Clara County  Office of Education

HOW TO FILL OUT A

PURCHASE ORDER CHANGE ORDER FORM

REVISED FORM APRIL 2018

HOW TO FILL OUT THE PURCHASE ORDER CHANGE FORM

A Purchase Order Change Order (POCO) allows changes to the purchase order detail with date sensitive encumbrance changes.

Accounting Services has authorization to pay up to 10% or \$100.00, whichever is less without having the program submit a change order form.

Any purchase order increase or decrease in funds, change in the account string (fund, resource code, object code, cost center, etc..) must be signed off by the program's accountant.

Non-contractual agreements that will take the total amount of the purchase order over \$10,000 needs the approval of the branch chief.

Contract related changes that will take the total amount of the purchase order over \$3,000 require the approval of the branch chief. If the original contract amount is exceeded, the approved contract amendment RM# must be listed on the POCO Description field.

Purchase Order Change Order (POCO) forms must be submitted to the appropriate buyer in Purchasing with all required signatures in order for the change to be processed.

PURCHASE ORDER CHANGE ORDER FORM (POCO)
Purchasing Department MC254B

From: Mail Code: Department: Date:
 PO Number Vendor Buyer

Availability of funds has been verified for PO increase

Full Account String											Original PO Amount	Current PO Amount (After Previous POCOs)	Increase/Decrease	Amount	New PO Total			
<input checked="" type="checkbox"/>	FND	RESC	Y	OBJT	SO	GOAL	FUNC	CSTCTR	STE	MNGR			Increase					
<input checked="" type="checkbox"/>	FND	RESC	Y	OBJT	SO	GOAL	FUNC	CSTCTR	STE	MNGR			Increase					
<input checked="" type="checkbox"/>	FND	RESC	Y	OBJT	SO	GOAL	FUNC	CSTCTR	STE	MNGR			Increase					
<input checked="" type="checkbox"/>	FND	RESC	Y	OBJT	SO	GOAL	FUNC	CSTCTR	STE	MNGR			Increase					
	FND	RESC	Y	OBJT	SO	GOAL	FUNC	CSTCTR	STE	MNGR			Increase					
Totals											\$	\$ 0.00	\$	\$ 0.00	\$	\$ 0.00	\$	\$ 0.00

Reason for change:

- If the original contract amount is exceeded, please list approved contract amendment RM# in description
- Change of Cost Center or Resource Code requires Program Manager and Program Accountant only
- All original approvers must sign POCO form prior to submission to Purchasing
- Branch Chief approval required: For non-contractual agreements that will take the total amount of the purchase order over \$10,000 (AR 3310)
- Branch Chief approval required: For contract related changes that will take the total amount of the purchase order over \$3,000 (BP 3312)

Authorizing Signatures

Manager/Supervisor:	<input type="text"/>	_____	Signature	Date:	<input type="text"/>
	Print Name				
Director	<input type="text"/>	_____	Signature	Date:	<input type="text"/>
	Print Name				
Branch Chief	<input type="text"/>	_____	Signature	Date:	<input type="text"/>
	Print Name				
Accountant	<input type="text"/>	_____	Signature	Date:	<input type="text"/>
	Print Name				
Buyer	<input type="text"/>	_____	Signature	Date:	<input type="text"/>
	Print Name				

HOW TO FILL OUT THE PURCHASE ORDER CHANGE FORM


THE PURCHASE ORDER CHANGE FORM CAN BE ACCESSED ONLINE ON THE INTRANET → FORMS & TEMPLATES → BUSINESS TAB → PURCHASING → PURCHASE ORDER CHANGE (pdf VERSION) <https://intranet.sccoe.org/rsc/forms/pa.asp>

PLEASE DOWNLOAD AND SAVE THE FORM ON DESKTOP OR FOLDER PRIOR TO ENTERING INFORMATION ON THE FIELDS.

1. **“FROM”** → NAME/ORIGINATOR OF THE POCO FORM
2. **“MAIL CODE”** → PROGRAM OR DEPARTMENT MAIL CODE
3. **“DEPARTMENT”** → PROGRAM OR DEPARTMENT NAME
4. **“DATE”** → DATE OF WHEN THE POCO IS ORIGINATED
5. **“PO NUMBER”** → PURCHASE ORDER, BLANKET PURCHASE ORDER OR THE EMERGENCY PURCHASE ORDER NUMBER
6. **“VENDOR”** → VENDOR NAME AS STATED ON THE PURCHASE ORDER
7. **“BUYER”** → THIS IS A DROP DOWN OPTION TO SELECT APPROPRIATE BUYER
 - *It is crucial the correct buyer is selected from the drop down as the respective buyer processes his/her Purchase Order Change Orders.*
8. **“FULL ACCOUNT STRING”** → 35-DIGIT ACCOUNT STRING
 - *If the Purchase Order consists of more than one account string, please make sure to list all account strings on the spaces provided even if no changes are to be done against the other account strings.*
9. **“ORIGINAL PO AMOUNT”** → REFERS TO THE ORIGINAL PURCHSE ORDER AMOUNT WHEN IT WAS ISSUED.
10. **“CURRENT PO AMOUNT (AFTER PREVIOUS POCOs)”** → REFERS TO THE PO AMOUNT IF A PREVIOUS POCO HAS BEEN PROCESSED AGAINST THE PURCHASE ORDER. OTHERWISE, USE “ORIGINAL PO AMOUNT.” IF THERE HASN'T BEEN A PREVIOUS POCO, ENTER THE ORIGINAL PO AMOUNT.

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11. **“INCREASE/DECREASE”** → THIS IS A DROP DOWN OPTION TO SELECT AN INCREASE OR DECREASE TO THE PO AMOUNT
12. **“AMOUNT”** → ENTER AMOUNT FOR INCREASE OR DECREASE
13. **“NEW PO TOTAL”** → TOTAL AMOUNT OF PO AFTER INCREASE OR DECREASE
 - *This number will automatically populate once the Original PO amount, Current PO amount, Increase or Decrease option and Amount fields are entered.*
14. **“REASON FOR CHANGE”** → REASON FOR CHANGE
15. **“MANAGER/SUPERVISOR”** → PROGRAM MANAGER OR SUPERVISOR
16. **“DIRECTOR”** → PROGRAM DIRECTOR
17. **“BRANCH CHIEF”** → BRANCH CHIEF SIGNATURE (IF NEEDED)
 - **NON-CONTRACTUAL: THE BRANCH CHIEF ONLY SIGNS IF THE AMOUNT TAKES THE PO TOTAL OVER \$10,000**
 - **CONTRACTUAL: THE BRANCH CHIEF SIGNS IF THE AMOUNT TAKES THE PO TOTAL OVER \$3,000**
18. **“ACCOUNTANT”** → THE PROGRAM ACCOUNTANT
19. **“BUYER”** → THE RESPECTIVE BUYER FOR THE COMMODITY WHO REVIEWS AND APPROVES THE CHANGE ORDER REQUEST

THE  BUTTON CLEARS ALL ENTERED INFORMATION.

PURCHASE ORDER CHANGE FORM

→ ACCOUNTING SERVICES AND/OR PURCHASING MAY RETURN THE POCO TO THE PROGRAM/ORIGINATOR IF:

→ THE OLD POCO FORM IS USED.

→ THERE ARE INSUFFICIENT FUNDS TO PROCESS THE CHANGE.

→ THE ACCOUNT STRING IS INCORRECT.

- *IF THERE IS CORRECTION ON THE ACCOUNT STRING AND ACCOUNTING REFERS THE POCO FORM BACK TO THE PROGRAM/ORIGINATOR, A REVISED FORM WITH THE CORRECTED CHANGE CAN BE ATTACHED AND SUBMITTED ALONG WITH THE ORIGINAL FORM. THERE IS NO NEED TO ROUTE THE FORM FOR CHANGES.*

→ THE AMOUNT TOTALS ARE INCORRECT.

- *IF THERE IS CORRECTION ON THE AMOUNT FIELDS WHICH WILL CHANGE THE AMOUNT OF THE PO, A REVISED FORM WITH THE AUTHORIZED SIGNATURES NEED TO BE RE-SUBMITTED.*

→ THERE ARE HANDWRITTEN CHANGES MADE ON THE POCO FORM.

- *HANDWRITTEN ADDITIONS TO THE "REASON FOR CHANGE FIELD" WILL BE ACCEPTED AS ADDITIONAL INFORMATION MAY NEED TO BE INCLUDED AS NOTES ON THE PO.*

→ THERE ARE MISSING APPROVAL SIGNATURES.

PURCHASE ORDER CHANGE FORM

ONCE THE ACCOUNTANT HAS REVIEWED AND APPROVED THE CHANGE REQUEST/S, THE POCO FORM AND ACCOMPANYING DOCUMENTS (IF ANY) WILL BE SCANNED TO THE RESPECTIVE BUYER AND COPY TO THE ORIGINATOR FOR PROCESSING.

THE BUYER WILL PROCESS THE CHANGE ORDER REQUEST WITHIN 24 HOURS OF RECEIPT OF THE CHANGE ORDER FORM AND CONFIRM THAT THE CHANGE IS READY IN QCC BY EMAILING THE ACCOUNTANT, THE ACCOUNT TECHNICIAN AND THE PROGRAM.

PURCHASING HEIRARCHY

BUYER 1 CHANGE ORDERS → PROCESSED BY PAULA CARDOZO (paula_cardozo@sccoe.org)

- IN PAULA'S ABSENCE, FORWARD BUYER 1 CHANGE ORDERS TO JOSEPHINE DY-LIACCO (josephine_dy-liacco@sccoe.org)

BUYER 3 CHANGE ORDERS → PROCESSED BY NADA CAVIGLIANO (nada_cavigliano@sccoe.org)

- IN NADA'S ABSENCE, FORWARD BUYER 3 CHANGE ORDERS TO JOSEPHINE DY-LIACCO

BUYER 4 CHANGE ORDERS → PROCESSED BY KAREN DONOHO (karen_donoho@sccoe.org)

- IN KAREN'S ABSENCE, FORWARD BUYER 4 CHANGE ORDERS TO PAULA CARDOZO

BUYER 5 CHANGE ORDERS → PROCESSED BY PAULA CARDOZO

- IN PAULA'S ABSENCE, FORWARD BUYER 5 CHANGE ORDERS TO KAREN DONOHO

BUYER 6 CHANGE ORDERS → PROCESSED BY JOSEPHINE DY-LIACCO

- * IN JOSEPHINE'S ABSENCE, FORWARD BUYER 6 CHANGE ORDERS TO NADA CAVIGLIANO

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