

Changing or Canceling a District Purchase Order, Independent Contract,
or Agreement for Services

Responsibility	Action
1. Requestor	<p>Prior to making the change or cancellation, submits a District Purchase Requisition to District Purchasing Services that lists the relevant Purchase Order Number, describes the desired cancellation or change, explains why the cancellation or change is necessary, and lists the dollar amount of all unpaid invoices, less any credits due, to be expensed against the referenced Purchase Order. The Budgeter(s) for the affected District accounts must sign the Purchase Requisition.</p>
2. Requestor	<p>If the Purchase Order to be changed or cancelled is for an Independent Contract or Agreement for Services, the Requestor completes a Change Form for Independent Contract or a Change Form for Agreement for Services, obtains the contractor's signature on the Change Form, obtains the signature of the District employee who signed the original contract, and attaches the Change Form to the Purchase Requisition in Step 1 above. Change Forms are available on the District Purchasing Services website.</p> <p>NOTES: (A) If the Independent Contract or Agreement for Services is being cancelled, a letter signed by the contractor that shows the contractor's agreement to the terms of the cancellation may be substituted for the Change Form.</p> <p>(B) If the Board of Trustees approved or ratified the contract that is being changed or cancelled, Board approval or ratification of the change or cancellation may be required.</p> <p>(C) If a contract change will cause the contract value to increase above the authorization limit of the person who originally signed the contract, then the contract Change Form will require either authorization by the Board of Trustees or signature by a person with sufficient Board-delegated contractual authority to approve the higher contract value.</p>

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3. Requestor	<p>If goods will be returned or exchanged: (I) For one-time purchase orders, also known as “A” orders, contacts the Buyer listed on the Purchase Order and makes arrangements;</p> <p>(II) For Open Purchase Orders, also known as “E” orders, requestor is responsible for returns and exchanges. Requestor returns the items to the store or contacts vendor and arranges for pick-up of goods by vendor from requestor’s location.</p>
4. District Purchasing Services Buyer	<p>Contacts the vendor or contractor as necessary to ensure mutual agreement to the Change or Cancellation. Except for Open Purchase Orders, negotiates and organizes return of goods, refunds, or exchanges. Ensures that the Purchase Order encumbrance will be increased or decreased by the correct amount to facilitate the desired change or cancellation and to meet all District financial obligations to the vendor or contractor.</p>
5. District Purchasing Services Buyer	<p>Enters the appropriate Purchase Order Revision to the District’s Financial Records System and increases or decreases the Purchase Order encumbrance as appropriate.</p>
6. District Purchasing Services	<p>Distributes a copy of the completed Purchase Order Revision or cancellation to District Accounting, the Requestor, and the vendor or contractor.</p>