Encumbrance Adjustment Form
Requisitions, POs, SCRs, Research Contracts, Postage, Telephone, and Long Distance

PO Bus Unit: __________ Req ID: ___________ PO ID: ___________ Vendor Name: __________________________

- [ ] Cancel the requisition. Do not place the order. *(Send form to Purchasing.)*
- [ ] Cancel the entire PO. No payment was or will be issued on a PO voucher. *(Send to AP for POs; GA for SCRs; OCG for research contracts.)*
- [ ] Adjust encumbrance as indicated below. *(Send to AP for POs; GA for SCRs; OCG for research contracts; Fin Svs-Admin for postage; Computing & Telecommunication Services for telephone or long distance.)*

<table>
<thead>
<tr>
<th>Item</th>
<th>Line No.</th>
<th>Sched No.</th>
<th>Distrib No.</th>
<th>(A) Original Encumbrance &amp; Change Orders</th>
<th>(B) Current Encumbrance Balance</th>
<th>(C) Requested Increase (+) or Decrease (-)</th>
<th>(A + C) Revised Total Encumbrance</th>
<th>(B + C) Revised Encumbrance Balance</th>
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<th>Project/Grant</th>
<th>Budget Period</th>
<th>Account</th>
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Comments: ______________________________________________________________________________________
______________________________________________________________________________________________

Department Contact: ___________________________ Phone: ___________________________
Certifying Signature: ___________________________ Date: ___________________________

For Office Use Only

Accounts Payable Approval: ___________________________ Date: ___________________________
Financial Svs-Admin Approval: ___________________________ Date: ___________________________
Computing & Telecom Approval: ___________________________ Date: ___________________________
Adjustment Completed By: ___________________________ Date: ___________________________

Revised May 6, 2002  Page 1 of 2
Encumbrance Adjustment Form Instructions
Requisitions, POs, SCRs, Research Contracts, Postage, Telephone, and Long Distance

1. Enter the PO business unit:
   00730 for UH POs or encumbered research contracts
   00783 for UH System POs or encumbered research contracts
   SC730 for UH encumbered SCRs, postage, telephone, and long distance
   SC783 for UH System encumbered SCRs, postage, telephone, and long distance

2. Enter the requisition ID, if one was created (reqs are not created for SCRs or research contracts).

3. Enter the purchase order ID, if one was created.

4. Enter the name of the vendor.

5. Check one of the three boxes to indicate the requested action.

6. If the last box is checked (adjust encumbrance), complete the table below as follows:
   Line No: PO line number to be adjusted
   Sched No: Schedule number on the PO line to be adjusted (almost always 1)
   Distrib No: Distribution number on the PO line to be adjusted
   A: Original encumbrance for the distribution, plus any change orders
   B: Current encumbrance balance for the distribution
   C: Requested increase (+) or decrease (-) to the distribution encumbrance

   Note: PO and research contract encumbrances can only be increased with this form if the increase will correct a previous mistaken decrease in encumbrance. An increase in quantity, unit price, or a change in the cost center requires a Change Order Request to Purchasing for POs or an amendment to the Office of Contracts and Grants for research contracts. SCRs and long distance encumbrances can be adjusted up or down and changes can be made to the cost center with this form. Telephone encumbrance adjustments also require a Telecom Work Request.

7. Enter the cost center, budget period, and account that corresponds to the PO line above.

8. Enter comments needed to explain unusual or complex requests, if needed.

9. Enter the name and phone number of the person to call in the department if there is a question.

10. The appropriate certifying signator signs and dates the form. Forms initiated by one of the processing units below do not require a certifying signature.

11. Mail or fax the completed form to the appropriate office, as indicated on the form.
   Purchasing - Mailcode 5015, FAX x35672, Phone x35671
   General Accounting - Mailcode 0902, FAX x38799, Phone x39024
   Office of Contracts and Grants - Mailcode 2015, FAX x39227, Phone x39232
   Accounts Payable - Mailcode 0900, FAX x38709, Phone x38700
   Financial Services - Administration - Mailcode 5011, FAX x35851, Phone x35591
   Computing & Telecommunication Services - Mailcode 1001, FAX x30980, Phone x31537

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