

Team 2 (ERSO) Programmatic BluCard Holder Purchasing Process

Step	Owner	Steps (assumes file retention in BearBuy)	Comments/Notes
1	Programmatic BluCard Holder	<p>Purchase</p> <ul style="list-style-type: none"> • Procures goods/services with BluCard and compiles required documentation per Bus 43, Part 8 ¹ • In BearBuy, completes the Non-Catalog Form <ul style="list-style-type: none"> ○ Select supplier “BluCard Tracking” ○ Enter Supplier information (i.e. name, contact information) ○ Select appropriate purchase status from drop-down menu ○ Complete General Info section ○ Include internal attachments if needed (see Comments sidebar) • Adds ‘PURCHASED_XX’ in the <i>Dept Ref No.</i> field of the cart, (where ‘XX’ denotes BC holder’s initials) • Fills in the <i>BluCard Holder</i> field (<i>Internal Notes and Attachments</i> section of cart) • Assign completed Cart to Unit’s Cart Authorizer ² 	<p>¹ Contact RSO as needed prior to procuring goods/services, to resolve questions regarding allowability or fund balances.</p> <p>² Internal unit purchase approval/ authorization process may be incorporated on this step; authorization must meet Team 2 (ERSO) purchase approval standards.</p>
2	Cart Authorizer	<p>Purchase Authorization</p> <ul style="list-style-type: none"> • Reviews Cart, selects Org Node and speedtype; submits Cart for processing ³ 	<p>³ If BluCard holder also holds a CA role AND submits the cart, written documentation of purchase approval by an additional individual with fund authority must be uploaded to BearBuy. This documentation step may be bypassed by assigning the cart to another designated CA for authorization and submission.</p>
3	ERSO Purchasing	<p>BearBuy Processing</p> <ul style="list-style-type: none"> • Requisition is Approved; BearBuy CC tracking number is generated. 	
4	Programmatic BluCard Holder/ Reconciler	<p>BluCard Reconcile in BFS (within 10 days of staging)</p> <ul style="list-style-type: none"> • Matches BFS transaction with BearBuy CC number; records this number in the Description field ⁴ • Applies charstring ⁵ • Applies correct sales/use tax • Uploads required backup documentation to BearBuy CC number through <i>Attachments</i> tab, per Bus 43, Part 8. 	<p>⁴ Description field naming convention: “CC#####/XX” (where CC##### is the BearBuy PO number, and XX denotes BluCard holder’s initials).</p> <p>⁵ Chartstring must be consistent with authorized approved fund in Step 2.</p>
5	RSO	<p>Approval</p> <ul style="list-style-type: none"> • Reviews BluCard transaction in BFS using source documentation from BearBuy CC number as backup • Approves transaction in BFS within the 15-day staging period 	
6	Programmatic BluCard Holder/ Reconciler	<p>Receiving</p> <ul style="list-style-type: none"> • Uploads documents through the BearBuy <i>Attachments</i> tab after completion of the PO workflow step, applying Team 2 (ERSO) receipt naming convention. ⁶ 	<p>⁶ CC1234_backup.pdf. See Team 2 (ERSO) BearBuy Receiving Guidelines, for reference.</p>