

UCSC - CruzBuy Account Profile Set-up and Authorization

Important: For full functionality, it may be necessary to download a copy of this form to your computer and open with [Adobe Reader](#) or Acrobat Professional. To save a completed form, you may need Acrobat Professional. For technical and accessibility assistance, contact finaff-tech@ucsc.edu. For questions on how to complete form, email: fin_probs@ucsc.edu

Section 1: General Information

Please select UCSC status:

- Staff Student
 Faculty Temp/Other

Name: _____

Last Name, First Name

Email: _____

Must be a valid UCSC email address, e.g. jsmith@ucsc.edu, jsmith@soe.ucsc.edu, etc.

Please select one of the following:

- New Account Modification

Use COMMENTS section, page 2 for special instructions.

Employee ID: _____

FIS Banner UserID: _____

only if applicable

Primary FOAPAL Organization Code:
(must be a six-digit number)

Division: _____

Campus Unit: _____

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Effective Date: _____

Phone: _____

Ship-To Code:

Note: Your Ship-To Code will be the default shipping information in your profile. This is the address where your goods will be delivered. If you do not know your default Ship-To Code, please consult the list available at: https://financial.ucsc.edu/Pages/PS_Ship_To_Codes.aspx

CruzBuy Roles:

This information is required for your CruzBuy profile. You must select at least 1 role. For questions about CruzBuy roles, contact CruzBuy Account Management Support at fin_probs@ucsc.edu.

Select the role descriptions that apply to you :

Requestor:

Add Remove

- Campus Requestor
 Physical Plant Requestor

Approver:

Add Remove

- Budget Approver *(complete Section 2: Budget/Physical Plant Approvals)*
 Physical Plant Approver *(complete Section 2: Budget/Physical Plant Approvals)*
 Food & Entertainment Approver *(complete Section 3: Food & Entertainment Approvals)*
 PI/Other Approver *(Principal Investigator or Other - approves orders in addition to Budget/Physical Plant and F&E Approver)*

Section 2: BUDGET/PHYSICAL PLANT Approvals

Do **NOT** complete this section unless you are requesting the Budget Approver or Physical Plant Approver role.

If you do not know your delegated budget authority, please consult with your manager or unit/divisional business manager.

Note: Budget Approvers and Physical Plant Approvers who are also Requestors are restricted to \$500 approval limit.

Check the boxes for the dollar amount of orders you will approve, up to your budgetary authorization limit. The approval limit selection is mandatory if you have selected the Budget or Physical Plant Approver role.

- Up to \$500 Up to \$2,500 Up to \$5,000 Up to \$10,000 Over \$10,000

Only level 2, level 3 or level 4 organization codes are accepted.

Section 3: FOOD & ENTERTAINMENT Approvals

Do **NOT** complete this section unless you are requesting the Food & Entertainment Approver role.

IMPORTANT: Your requested approval limit and org codes MUST match your Event Expense Certifier (EEC) or Event Order Approver (EOA) authorization. If you do not know your delegated EEC/EOA authority, please consult with your manager or unit/divisional business manager.

Check the boxes for the dollar amount of orders you will approve, up to your EEC/EOA authorization limit. The approval limit selection is mandatory if you have selected the Food & Entertainment Approver role.

- Up to \$300
 Up to \$500
 Up to \$1,000
 Up to \$5,000
 Up to \$10,000
 Up to \$15,000
 Up to \$25,000
 Up to \$100,000
 Up to \$250,000
 Over \$250,000

Only level 2, level 3 or level 4 organization codes are accepted.

Section 4: Comments

Use this section to provide any additional information about your request.

Section 5: Authorization

Providing incomplete or incorrect information in this section will delay account processing. All signatures are required.

CruzBuy Divisional Access Authorizer and Primary Contact List is available at: https://financial.ucsc.edu/Pages/Access_Authorizers_CruzBuy.aspx

Signing indicates agreement to abide by UCSC Information Security policy as specified at:

Employee Signature:	Print Name:	Date:
Supervisor Signature:	Print Name:	Date:
CruzBuy Divisional Access Authorizer Signature:	Print Name:	Date:

Section 6: Next Steps / Submit Information

Scan and email the completed, fully-authorized form in PDF format to fis_probs@ucsc.edu; or send through campus mail to CruzBuy Account Management Support, mailstop: Accounting Office. You will be notified by email when your account is ready with instructions on how to pick up your account login information.