

# UCSC - CruzBuy Account Profile Set-up and Authorization

**Important:** Form must be filled out in [Adobe Reader](#) or Acrobat Professional 8.1 or above. To save completed forms, Acrobat Professional is required. For technical and accessibility assistance, contact [finaff-tech@ucsc.edu](mailto:finaff-tech@ucsc.edu). **Form questions:** Email [fis\\_probs@ucsc.edu](mailto:fis_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.

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

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Division: \_\_\_\_\_

Employee ID: \_\_\_\_\_

FIS Banner UserID: \_\_\_\_\_

*only if applicable*

Campus Unit: \_\_\_\_\_

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:

**CruzBuy Roles:**

This information is required for your CruzBuy profile. You must select at least one role. For questions about CruzBuy roles, contact CruzBuy Account Management Support at [fis\\_probs@ucsc.edu](mailto:fis_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](https://financial.ucsc.edu/Pages/Access_Authorizers_Cruzbuy.aspx)

Signing indicates agreement to abide by UCSC Information Security policy as specified at: <http://its.ucsc.edu/security/restricted.html>

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

### Section 6: Next Steps / Submit Information

**Please submit this form to Enterprise Financial Systems:**

Scan and e-mail to [fis\\_probs@ucsc.edu](mailto:fis_probs@ucsc.edu) or mail to FIS Account Administration Mailstop: Accounting Office

**IMPORTANT:** Completion of the [Access to Information Statement](#) is required for all **new** CruzBuy accounts. (CruzID Gold login required.) For more information, please visit: <http://its.ucsc.edu/accounts/forms.html#buy>

**You will be notified by email when your account is ready with instructions on how to pick up your account login information.**

For more information, please visit [https://financial.ucsc.edu/Pages/Systems\\_cruzbuyguide.aspx](https://financial.ucsc.edu/Pages/Systems_cruzbuyguide.aspx).