

How to Record EPP/SABRC in FI\$Cal Supplemental Job Aid 1.0

Date: August 13, 2019

Target Audience: Department Buyer, Department Advanced Buyer, and Department PO Processor

Purpose: The purpose of this supplemental job aid is provides basic instructions on how to record EPP and SABRC in FI\$Cal.

1.0 Introduction:

In order to designate a purchase as Environmentally Preferable (EPP), the purchase must fulfill one or more of the following criteria:

1. Acquired through an EPP Item
2. Meet a DGS Purchasing Standard
3. Include Third-Party Environmental Certifications
4. Include the availability of a Take-Back program
5. Be State Agency Buy Recycled Campaign (SABRC) compliant
6. Get recorded in FI\$Cal as EPP

Purchases that meet one or more of the listed criteria are considered EPP and must be reported within FI\$Cal.

Specific EPP terms are used within FI\$Cal. For definitions of the EPP Terms used, see *Buying Green: EPP Terms*.

The EPP FI\$Cal Job Aids are a comprehensive “how-to” series that provides detailed instructions on how to buy green. Visit the Supplemental Job Aids & Training Tips FI\$Cal link to access the complete Buying Green Job Aids.

2.0 What is EPP in FI\$CAL:

The EPP Program incorporates EPP into FI\$CAL to promote and encourage green purchasing. To assist state departments with the reporting of products that meet EPP criteria, the Department of General Services Environmentally Preferable Purchasing (EPP) Program has established this document.

3.0 When to Record EPP in FI\$Cal:

Departments shall record EPP purchases in FI\$Cal. By recording EPP attributes within FI\$CAL, in accordance with the Buying Green Procedures, departments will be able to monitor the green purchasing progress through FI\$CAL reports.

4.0 How to Record EPP in FI\$Cal:

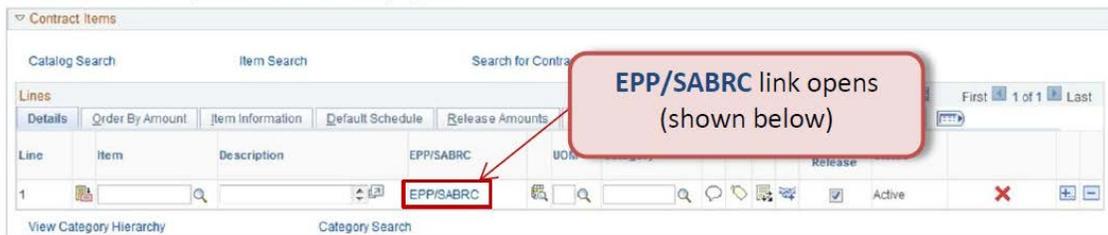
Record a Purchase via an Item

The simplest way to buy green and report green purchases is to purchase through an EPP Item. If purchasing EPP Items, no further action in FI\$Cal is required. As applicable, EPP Items will incorporate third-party environmental certifications, take-back, and/or SABRC information into your FI\$Cal record.

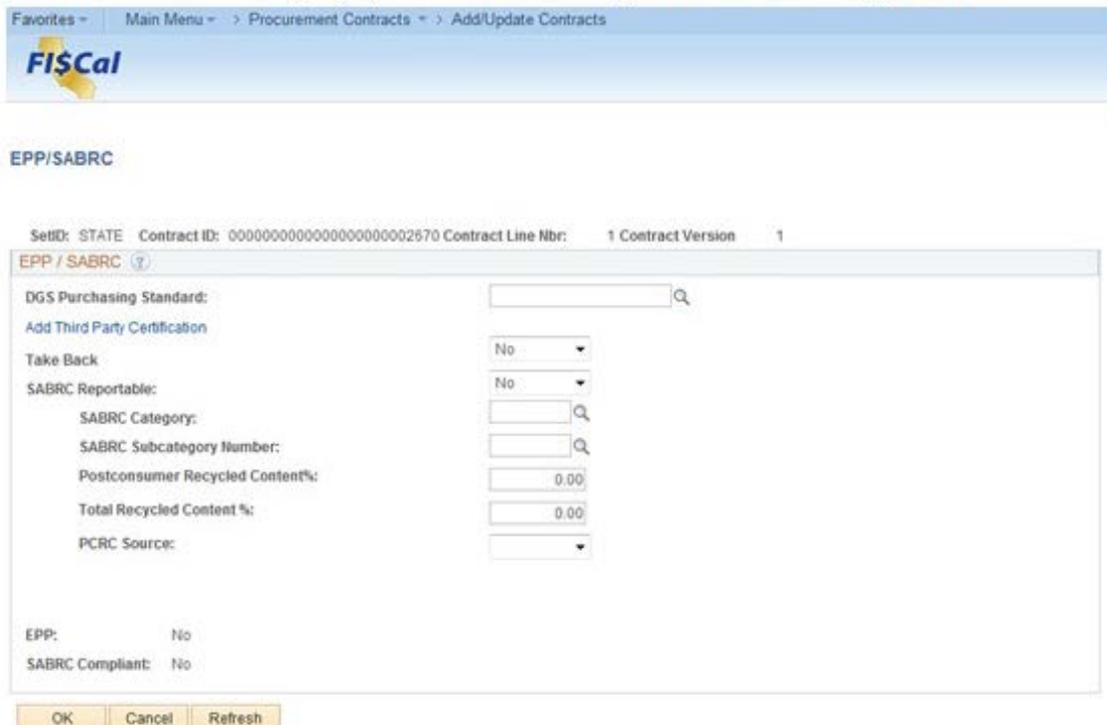
Record a Purchase Line with EPP Criteria

For all EPP and SABRC reportable purchases, other than those being purchased through an EPP Item, apply the following steps to report your environmentally preferable purchases in FI\$Cal:

1. Click on the link to open the EPP/SABRC page.



2. Open the EPP/SABRC page, enter the following information as applicable:



14. EPP/SABRC information is tracked at the line item level. Repeat step for each line item as applicable.

15. EPP/SABRC Page (completed view):

Favorites ▾ Main Menu ▾ > Procurement Contracts ▾ > Add/Update Contracts

FI\$Cal

EPP/SABRC

SetID: STATE Contract ID: 0000000000000000000000002670 Contract Line Nbr: 1 Contract Version 1

EPP / SABRC ?

DGS Purchasing Standard: DGS-441200-A Paper, Product Office Supplies

Edit Third Party Certification

Take Back: Yes

SABRC Reportable: Yes

SABRC Category: 1 Paper Products (PP, 30% Min. PC)

SABRC Subcategory Number: 1A Paper Products (PP, 30% Min. PC)

Postconsumer Recycled Content%: 10.00

Total Recycled Content %: 30.00

PCRC Source: Catalog

EPP: Yes

SABRC Compliant: No

OK Cancel Refresh

These fields automatically update based on information entered on the EPP/SABRC page.

Click "OK" to return to Main Contract page.

5.0 References & Resources:

Buying Green Guide DGS publishes a best practices manual, the [Buying Green Guide](#). The guide provides state buyers and suppliers with a single source of up-to-date EPP Contracts, DGS Purchasing Standards, bid specifications, and buying tips. It also provides access to laws, regulations and standards that shape procurements and provides transparency to the work DGS does.

The EPP FI\$Cal job aids are a comprehensive “how-to” series that provides detailed instructions on how to buy green and how to record those purchases in FI\$Cal. Visit the [Buying Green](#) website to access the full series:

1. How to Purchase Through an EPP Item
2. How to Apply DGS Purchasing Standards
3. How to Apply Third-Party Environmental Certifications
4. How to Include Take-Back
5. How to Apply State Agency Buy Recycled Campaign (SABRC)
6. How to Record EPP/SABRC in FI\$Cal

Contact the Environmentally Preferable Purchasing Program with Buying Green questions by emailing buygreen@dgs.ca.gov