

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.

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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:

Catalog	Sea	arch	Item Search		Search	n for Contra				li.			h		
Lines							EPP/SA					15	First	1 of 1	E Last
Details	1	Order By Amount	Item Information	fault Schedule	<u>R</u> elease A	mounts	(sh	ow	/n l	bel	ow)				
Line		Item	Description	EPP/	SABRC	uon		-	_	-	Release				
1		a		EPP	SABRC	6 Q	Q	0	10	1	e 💌	Active	3	×	E

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

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

2670 Contract Line Nbr: 1	Contract Version 1	
1	Q	
No 👻		
No 👻		
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	No • No • 0.00	No • No • 0.00 0.00

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3. DGS Purchasing Standard: Use magnifying glass to select the applicable DGS purchasing standard. If DGS purchasing standard does not apply, leave blank. Visit the *FI*\$*Cal Job Aid: How to Apply DGS Purchasing Standards* for more help with this topic.

ntract Version 1
ntract Version 1
9
Click to add DGS
Purchasing Standard
Furchasing Standard

4. Add Third-Party Certifications: click link to open the Third-Party (environmental) Certifications page, and select up to three third-party certifications. Visit the *FI\$Cal Job Aid: How to Apply a Third-Party Environmental Certification* for more help with this topic.

Favorites -		Contracts -> Add/Update Contracts	
Third Party (Certification	Use lookup to se Party Certifi	
SetID: S Version: 1			Click (+) to add
Number	Personalize Third Party Certification	Find View All 🔄 🔠 First 🗹 1 of 1 🗷 Las Title	additional certifications
OK	Cancel Refresh		

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Favorites - M	ain Menu 👻 ≻ Procurement (Contracts ~ > Add/Update Contracts		
Third Party Cer	tification			
SetID: STAT				
Version: 1	Line Nbr: 1 Personalize F	Find View All [코] 웹 First 🖪 1-2 of 2	Last	
Number	Third Party Certification	Title		
1 16 Q	EPEAT	EPEAT	+ -	
2 3 Q	ENERGY STAR®	ENERGY STAR® Program Requirements Product Specification for Computer Servers	+ -	Click " OK " to return to EPP/SABRC page.
ок 🗧 Са	ancel Refresh			

5. Take-Back: Select "Yes" from the drop-down list if the contractor, supplier, and/or vendor **provides** a take-back option for this item. Visit the *FI\$Cal Job Aid: How to Incorporate Take-Back* for more help with this topic.

EPP/SABRC			
SetID: STATE Contract ID: 00000000000000000000000000000000000	70 Contract Line Nbr: 1 Co	ontract Versi	Take-Back Yes/No field
DGS Purchasing Standard:	DGS-441200-A	Q F	
Edit Third Party Certification Take Back	Yes V		
SABRC Reportable: SABRC Category:	1 Q	Paper Pro	
SABRC Subcategory Number:	1A Q	Papar Pro	

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70 Contract Line Nbr: 1 Contr	ract Version 1
	Q.
No •	
No 🔫	
Q	SABRC fields must be
Q	completed for all SABRC
0.00	
0.00	Reportable purchases.
_	
	No • No • Q Q 0.00

- SABRC Reportable: Select "Yes" from drop-down if item falls within one or more of the SABRC reportable categories, regardless of whether the item meets the minimum recycled content. See FI\$Cal Job Aid: How to Apply SABRC
- 7. SABRC Category: If item is SABRC reportable, use lookup icon (i.e., magnifying glass) to select applicable SABRC Category (e.g. "6 Plastic Products").
- SABRC Subcategory: If item is SABRC reportable, use lookup icon (i.e., magnifying glass) to select applicable SABRC Subcategory Number (e.g. "6C – Carpet").
- Postconsumer Recycled Content % (PCRC): Enter PCRC percentage for item in number format (i.e. "5" = 5% PCRC).
- 10. Total Recycled Content % (TRC): Enter TRC percentage for item in number format (i.e. "10" = 10% TRC). TRC is the sum of PCRC and any additional pre-consumer recycled content, thus TRC must be equal to or greater than PCRC.
- 11. PCRC Source: Select source of PCRC information from drop-down (Product Label, Product Specifications, Catalog, OEM Website, Vendor, Other).
- 12. Click "OK" button to return to main Contract page.
- 13. Click "Save" button on the bottom of Contract page to save changes.

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



Favorites - Main Menu - > Procurement Contracts	Add/Update Contracts		
FI\$Cal			
EPP/SABRC			
SetID: STATE Contract ID: 00000000000000000000000000000000000	70 Contract Line Nbr: 1	Contract Version 1	
EPP / SABRC (2)			
DGS Purchasing Standard:	DGS-441200-A	Paper, Product Office Supplies	
Edit Third Party Certification			
Take Back	Yes 👻		
SABRC Reportable:	Yes 👻		
SABRC Category:	1 Q	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		These fields automa based on informatic the EPP/SABR	on entered on
OK Cancel Refresh			
	k " OK " to return ain Contract pag		

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5.0 References & Resources:

Buying Green Guide DGS publishes a best practices manual, the <u>Buying Green Guide</u>. 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 <u>buygreen@dgs.ca.gov</u>