BFSv9 Exception Request Form – bluCard Program

Part 1 – Cardholder and Department Information

Cardholder Name (please print):	☐ New Cardholder (Attach Exception Request to Cardholder Account Form) ☐ Current Cardholder		
Department Name:	Processing Unit ID:	Employee ID:	Date:

Part 2 - Merchant Category Code(s) to Unblock

Section 2A – Standard Exceptions

Select which of the following merchant category code(s) to unblock to enable purchases allowed by standard policy.

☐ 5411 GROCERY STORES   (for non-entertainment* purchases)
  *ENT Policy: **http://policy.ucop.edu/doc/3420364**

☐ 3501-3800, 7011 HOTELS   (for non-travel** purchases)
  TRV Policy: **http://policy.ucop.edu/doc/3420365

Section 2B – Other Merchant Category Codes to Unblock

Provide Code & Description of MCC not listed in Section 2A.

☐ _____ _____
☐ _____ _____
☐ _____ _____
☐ _____ _____

Part 3 – Special Card Types

☐ **Dedicated Card for Special Purpose**

Dedicated cards are used for a particular commodity and/or supplier. Card use shall be in the form of releases against a Department Master Blanket Contract, campus contract, University systemwide agreement, eProcurement or for a commodity paid on an express voucher, such as utilities. If this will result in a cardholder having more than one card, combine the justification with the one required below.

☐ **Multiple Cards per Cardholder**

It is generally the policy of the University to restrict the number of cards to one per employee. Please provide the business reason in Part 4 for requesting the additional card(s). Include the internal control procedures for ensuring proper accountability in their use.

☐ **Card for MSO or Department Business Mgr** Attach detailed description of the internal control procedures in place to meet the requirements of UC BUS 43, Part 8, Section V, A, signed by the person who will approve charges.
For policy BUS-43, Part 8 go to:
http://policy.ucop.edu/doc/3220485

Part 4 - Purpose and Controls: Complete for all requests.

Section 4A - Business Purpose? (Attach additional sheet if needed):

Section 4B - Control Procedures? (Attached additional sheet if needed):

Departmental control procedures that will ensure that exceptional purchases made with the bluCard are solely for the reason(s) stated herein for which the exception was granted. These may include card security, special order forms, a log for the purchases, pre-authorization, a special file, etc.

Control Unit Approval Signature Required for Exceptions in Section 2B and/or Part 3:

Name (please print):	Signature:	Date:

Part 5 – Department Approvals Required for All Exception Requests

Cardholder Signature Required:

I agree to always observe UC purchasing policy and procedure as outlined in the Cardholder's User Guide, on the web and elsewhere. If this exception request is approved, I agree to use my bluCard for the purpose(s) stated herein and abide by the controls that are included with this request. I understand that misuse of the card could result in the cancellation of my bluCard and/or other consequences up to and including disciplinary action.

Cardholder Signature:	Date:

Authorized (or Delegated) Signer Signature Required:

I understand it is my responsibility to ensure the designated cardholder has been trained and will follow all applicable University and program policies and procedures.

Name (please print):	Signature:	Date:

Part 6 – UC Berkeley Card Program Services Approval

Card Programs Manager (or Designee):	☐ Approved	☐ Denied
Name (please print):	Signature:	Date: