



# Transition Guide for Direct Customers

Valuable information regarding the continued  
integration of Bard Access Systems, Inc.  
(Bard Access) with BD

**Effective July 2022**

**Updated May2022**



# Contents

- Introduction..... 3
- Account Setup..... 4
- Electronic Data Interchange (EDI) Setup ..... 5
- Unit of Measure Reclassification ..... 5
- Lockbox Key Information ..... 6
- Order Management .....7
- Distribution and Transportation.....7
- Claims Resolution and Return Requests .....7
- Contracts..... 8
- Cutover and Go-Live ..... 8
- Summary..... 9
  - Summary of Changes..... 9
  - Contacts for Additional Information and Support ..... 10
  - Readiness Checklist and Customer Action Items..... 11
  - Frequently Asked Questions ..... 12

Updated May 2022



**Note:** Updates have been made to this document. Some messaging has been voided, as it is no longer valid, and some messaging has been added to identify changes in the integration process to provide clarity.

Voided example: All voided text will appear in this font color

New addition example: All newly added text will appear in this font color

# Introduction





As trusted partners in healthcare, we want to inform you of upcoming improvements we're making to simplify our systems. Effective July 1, 2022, the operational systems of Bard Access Systems, Inc. (now part of BD) will be transitioned to the BD Enterprise Resource Planning (ERP) platform. This operational integration is a major step forward in our continued journey to provide you with a simplified and improved experience working with BD.

This transition guide outlines the changes and provides guidance to help customers who purchase directly from Bard Access prepare for the upcoming integration of Bard Access products into the BD systems.

All products sold by Bard Access are considered in-scope and include Peripherally Inserted Central Catheters, Acute Dialysis Catheters, Midline Catheters, Port Access, Intraosseous devices, Ultrasound and Tip Confirmation systems and accessories and Stabilization Devices. A complete list of in-scope products is available through our ERP project site at [bd.com/ERP2022](https://bd.com/ERP2022).



**Note:** Legacy C.R. Bard (Bard) divisions of Bard Medical/Urological, Bard Davol and Bard Peripheral Vascular are not affected by this change and will remain in their separate enterprise system.

In-scope	BD Business Unit	Legacy Bard Division
	BD Medication Delivery Solutions - Vascular Access Devices	Bard Access Systems, Inc.
	BD Surgery	Bard Davol
	BD Urology and Critical Care	Bard Medical/Urological
	BD Peripheral Intervention	Bard Peripheral Vascular



**Note:** Please share this guide with the appropriate departments and individuals within your organization.

# Account Setup

Bard Access Sold-To / Ship-To Account numbers will be converted to BD account numbers, which are 10 numeric characters in total and begin with: 100XXXXXXX. If no BD account number currently exists, one will be assigned. Retired legacy Bard Access account numbers, contract numbers, and other identifiers will be cross-referenced to the corresponding BD master files.

For information related to your account number cross-reference, please contact us through our ERP project site at [bd.com/ERP2022](https://bd.com/ERP2022).

Effective Friday, July 1, (but not earlier than close of business on Thursday, June 30) the BD account number must be used for all transactions, including order placement. Additionally, Bard Access products must be reassigned to the BD Medical Vendor Code/ID.

Reassigning the Bard Access products to the BD Medical Vendor Code/ID will result in the following:

- The BD W-9 form will apply. Requests for this form can be directed to [crednasc@bd.com](mailto:crednasc@bd.com)
- Tax Certificates referencing Becton Dickinson as the seller are required to be on file for all accounts
- BD Regional lockbox keys will be used for invoice payments



**Note:** Continue to use your existing Bard account numbers for legacy Bard divisions of Bard Medical/Urological, Bard Davol and Bard Peripheral Vascular.

A Sales & Use Tax Exemption certificate, referencing Becton Dickinson as the seller, is required to be on file to avoid tax charges on future BD invoices. Existing Bard Access customers that do not already have an exemption certificate on file with BD will need to submit one prior to July 1.

Updated exemption certificate issued to seller **Becton Dickinson** can be emailed to [Taxinquiries@bd.com](mailto:Taxinquiries@bd.com) or mailed to BD, Attn. Indirect Tax, 5859 Farinon Dr. San Antonio, TX 78249.

For your convenience, a blank Uniform Sales & Use Tax Exemption/Resale Certificate – Multi-jurisdiction can be found on [mtc.gov/Resources/Uniform-Sales-Use-Tax-Exemption-Certificate](https://mtc.gov/Resources/Uniform-Sales-Use-Tax-Exemption-Certificate). Please complete the seller portion of the form; the seller is now **Becton Dickinson, 5859 Farinon Dr., San Antonio, TX 78249**. If you do business under multiple company names/entities, please include a DBA list.



**Note:** If you are a Tax-Exempt account, please send your Tax Certificates to BD prior to July 1. Accounts without a valid exemption certificate on file will be set up as taxable.

Effective July 1, customers registered with the BD Customer Care Portal will be able to use their current BD registration for Bard Access inquiries. This portal allows you to view information and manage inquiries relating to order status, BD product information, and recalls notification and management.

## Licenses

With federal regulations restricting the sale of some of our products to healthcare professionals or other authorized channels, our order management system must verify customer qualifications based on license information and effectiveness dates stored within your account profile. If this information is not available through our database resource, we will request a copy of your license information as authorization verification to purchase these restricted products. This is informational only and no action is needed at this time.

# Electronic Data Interchange (EDI) Setup

Please continue to use your current Bard Access vendor EDI setup until June 30, 1:30 p.m. EST. After this time, we will stop processing incoming EDI transactions for legacy Bard Access products until our cutover activities are completed.

- Discontinue using the Bard Access vendor EDI setup June 30, 1:30 p.m. EST
- Hold all Bard Access EDI orders from June 30, 1:30 p.m. EST through July 5, 9:00 a.m. EST
- Begin using the BD vendor EDI set up as of July 5, 9:00 a.m. EST and resume order placement

Beginning July 5, transactions for Bard Access products must use the BD Medical vendor/EDI setup. Orders placed under the wrong Vendor Code/ID will result in an order error and BD will contact you to re-submit the order.

No changes are required for other legacy Bard divisions/products.

~~Bard Access products should not be mixed with other BD products on the same purchase order.~~

For EDI specific questions, please contact us at [EDI-ERP2022@bd.com](mailto:EDI-ERP2022@bd.com). If you use GHX for your EDI services, they will also be communicating this change and you may contact them directly for assistance in moving your EDI transactions to BD Medical.



**Note:** Continue to use your existing Bard Vendor Code/ID for transactions for legacy Bard divisions of Bard Medical/Urological, Bard Davol and Bard Peripheral Vascular.

## Unit of Measure Reclassification

The current Bard Access ERP system utilizes “Each” and “Case” as salable Units of Measure (UoM). As part of a FUTURE alignment, Bard Access will transition a sub-set of product codes to the BD ERP configuration of “Each”, “Shelfpack”, and “Case”.

**At this time, no customer action is needed.** We wanted to make you aware of this upcoming change, as you may start to see reference to “Shelfpack” in certain situations. To ensure uninterrupted order placement and shipments:

- BD will internally convert your UoM on EDI orders to “Shelfpack” for the applicable product codes. The conversion will occur on inbound and outbound data to present a transparent process.
- Customer Care will manage the UoM conversion for manual sales orders

Although orders will be placed using your existing UoM, the term “Shelfpack” will be represented on some documentation and through the BD customer Care Portal. The packing slip and pallet content label will reflect the ordered UoM.



**Note:** Continue to place orders in the same unit of measure as you do today. BD will provide future communications with appropriate timing to make the needed changes.

# Lockbox Key Information

State	Lockbox	State	Lockbox
AK	WEST	MT	CENT
AL	CENT	NC	EAST
AR	CENT	ND	CENT
AZ	WEST	NE	CENT
CA	WEST	NH	EAST
CO	CENT	NJ	EAST
CT	EAST	NM	CENT
DC	CENT	NV	WEST
DE	EAST	NY	EAST
FL	CENT	OH	CENT
GA	CENT	OK	CENT
HI	WEST	OR	WEST
IA	CENT	PA	EAST
ID	CENT	RI	EAST
IL	CENT	SC	EAST
IN	CENT	SD	CENT
KS	CENT	TN	CENT
KY	EAST	TX	CENT
LA	CENT	UT	CENT
MA	EAST	VA	EAST
MD	EAST	VT	EAST
ME	EAST	WA	WEST
MI	CENT	WI	CENT
MN	CENT	WV	EAST
MO	CENT	WY	CENT
MS	CENT		

## EAST - JP Morgan Chase

Mailing Address	Wiring Instructions
Becton, Dickinson & Co. PO Box 28983 New York, NY 10087-8983	ABA 021000021 Acct 700605699 Swift CHASUS33

## WEST - JP Morgan Chase

Mailing Address	Wiring Instructions
Becton, Dickinson & Co. PO Box 100921 Pasadena, CA 91189-0921	ABA 021000021 Acct 700605699 Swift CHASUS33

## CENT - JP Morgan Chase

Mailing Address	Wiring Instructions
Becton, Dickinson & Co. 21588 Network Place Chicago, IL 60673-1215	ABA 021000021 Acct 700605699 Swift CHASUS33

### Overnight Address:

JPMorgan Chase – Lockbox Processing  
 Attn: BD and Company  
 Box Number - 28983  
 4 Chase Metrotech Center  
 7th Floor East  
 Brooklyn, NY 11245

# Order Management

Order placement for Bard Access products will continue to be made available via EDI, email, fax, or phone call. ~~Other than changing to a new Vendor/ID Code, continue to place your orders for Bard Access products as you do today.~~ As part of the harmonization and alignment to the BD Vendor Code, products will be aligned to the BD Terms and Conditions effective July 1. Orders can continue to be submitted separately or can now be combined with your BD Medical orders. To avoid the BD manual order fees as per the BD Terms and Conditions please place all orders via EDI including rush orders. The Bard Access products will continue to be distributed from a different Distribution Center network, and shipments will not be combined with other BD products.



**Note:** While you may either place separate orders for Bard Access products or combine your orders with BD, effective July 1, the Bard Access products will be governed by BD's Terms and Conditions of Sale.



**Note:** Please continue to place orders through your current order channel. ~~Please do not combine your Bard Access orders with other BD products, as~~ the Bard Access products are distributed from a different Distribution Center network.

Any unfilled/backordered products will be transferred to the BD system as part of the cutover process. The original Purchase Order number reference will be retained, and a new BD Sales Order number assigned for the unfilled products. There will be no second order acknowledgement; however, order status inquiries can be made using the BD Customer Care Portal located at [bd.com/customercare](https://bd.com/customercare).

Existing BD customers registered with the BD Customer Care Portal will be able to use your current BD registration for your Bard Access inquiries. This website allows you to view information and manage inquiries relating to order status, BD product information, and recalls notification and management.

## Distribution and Transportation

Bard Access products will continue to be shipped from the Bard Global Distribution Center in Covington, GA, and will not be combined with shipments of other BD products. Packing lists and documentation will transition to an external label and will no longer be located inside the package.

## Claims Resolution and Return Requests

[SLC.CS@bd.com](mailto:SLC.CS@bd.com) will continue to serve as a single point of contact regarding order fulfillment, discrepancies, or issues for Bard Access products, including shipments (shortage, overage, incorrect product etc.), pricing and billing, return requests and disputes (i.e., claim denials). ~~Product returns will be governed by the BD Terms and Conditions of Sale.~~

Product returns will require a pre-authorization from a BD representative, and a new product return address will be provided for authorized Bard Access return requests made on or after July 1.

# Contracts

Bard Access contracts will move “as is” into the BD system, with existing pricing unchanged. A new contract/agreement number will be assigned and will be reflected on future contracts or revisions. Effective July 1, all current and future contract notifications will reference the new BD Contract number and will no longer reference the Bard Access contract number. Customers will continue to receive contract notifications for direct contracts.

Customers authorized to do price searches in the BD Customer Care Portal will need to use the converted contract number for BD contract-specific searches.

## Cutover and Go-Live

BD has conducted extensive detail planning and scheduling for this transition phase, combined with robust testing and in-depth training with our BD teams. Our cutover activities will begin Thursday afternoon, June 30 and run through Monday, July 4. During this period, no orders or shipments will be processed for the in-scope products. Orders and shipments will resume on Tuesday, July 5.

To ensure a smooth system cutover, please follow the below schedule for placing your sales orders during the cutover period.

Order Method	Last June Sales Order Placed with your current Bard Vendor Code/ID	Cutover No transactions processed	First July Sales Order Placed with the BD Medical Vendor Code/ID
Electronic Orders (EDI)	June 30, 2022 1:30 p.m. Eastern time	July 1, 2022 – July 4, 2022	July 5, 2022 9:00 a.m. Eastern time
Non-Electronic Orders (Phone, Email, FAX)	June 30, 2022 2:30 p.m. Eastern time	July 1, 2022 – July 4, 2022	July 5, 2022 9:00 a.m. Eastern time

To help support a smooth transition, customers can place replenishment stocking orders for in-scope products during the last two weeks of June. This will allow the warehouse time to finalize shipments prior to cutover and Go-Live activities.



**Note:** To reiterate, this change affects only the Bard Access products. There will be no impact to products for the legacy Bard businesses of Bard Medical/Urological, Bard Davol and Bard Peripheral Intervention.



# Summary

## Summary of Changes

### **Contracting**

- Customers will be assigned a new SAP contract/agreement number to access contract pricing
- SAP agreement name will denote contract type, product category, and customer

### **Ordering, Distribution and Returns**

- Bard Access customers will convert to the BD customer number
- The BD Medical Vendor ID is to be used for all Bard Access orders
- Packing Slips will originate from the Bard Global Distribution Center and will transition from a pack slip inside the package to an external label
- Invoices will originate from BD and follow the BD format
- Quality certs (CoC) will be available at [bd.com/regdocs](https://bd.com/regdocs)
- Bard Access products will now be governed by the [BD Terms and Conditions of Sale](#)

# Contacts for Additional Information and Support

<b>Customer Support</b>	
9:00 a.m. to 6:30 p.m. Eastern Monday – Friday	844-823-5433 Telephone 801-522-4948 Fax <a href="mailto:slc.cs@bd.com">slc.cs@bd.com</a>
<b>BD Customer Care Portal</b>	
Online Order Status, Claims Resolution and Invoices	<a href="https://bd.com/customer-care">bd.com/customer-care</a>
<b>EDI</b>	
EDI Integration Questions (pre-July 2022)	<a href="mailto:EDI-ERP2022@bd.com">EDI-ERP2022@bd.com</a>
EDI Support (post-July 2022)	<a href="mailto:e_business_prod@bd.com">e_business_prod@bd.com</a>
<b>Product Quality Complaints</b>	
	<a href="mailto:productcomplaint@bd.com">productcomplaint@bd.com</a>
<b>Returns/Credits</b>	
	<a href="mailto:slc.cs@bd.com">slc.cs@bd.com</a>
<b>ERP Integration Project Information</b>	
BD In-scope Product List, FAQ's and Sample Documents located on our project portal	<a href="https://bd.com/ERP2022">bd.com/ERP2022</a>

# Readiness Checklist and Customer Action Items

## Account Information (BD Contract & Account Numbers)

### What will occur

- Bard Access Sold To / Ship To account numbers converted to BD account numbers
- New account numbers will be created if no BD account number currently exists
- Retired Bard Access account numbers, contract numbers, and other master data will be cross-referenced to the BD master data

### Action items

- In-scope materials to reflect the BD Medical vendor ID effective July 1
- The BD account number must be used for all Bard Access transactions after July 1

## Ordering

### What will occur

- Orders to be placed in the BD enterprise system
- All applicable EDI document types will be available for customers currently utilizing EDI

### Action items

- Effective Friday July 1 orders to reflect BD Medical as the vendor
- Continue to place orders for Bard Access products through the same order channel used today
- ~~Continue to place Bard Access sales orders separately—do not combine with other BD or BD-MDS products~~
- You may continue to place orders for Bard Access products separately or you may combine your Bard Access products with your BD Medical order

## Invoicing, Payments, Tax Certificates

### What will occur

- BD W-9 form and Tax Certificates will apply
- Invoices created after July 1 will be generated from BD

### Action items

- Payments for invoices generated prior to July 1 to be made to the C.R. Bard lockbox
- Payments for invoices generated after July 1 to be made to the appropriate BD lockbox
- If you are a tax-exempt account, please send your Tax Certificates to [Taxinquiries@bd.com](mailto:Taxinquiries@bd.com)

## Cutover

### What will occur

- Unfilled orders will be transferred to the BD system on July 1 retaining the original Purchase Order number reference while assigning a new BD sales order number
- A brief interruption in processing sales orders will occur during the cutover activities

### Action items

- Place replenishment stocking orders the last two weeks of June
- Place final June order no later than June 30 at 2:30 p.m. EST
- Do not place sales orders on Friday, July 1
- Begin placing orders as of Tuesday, July 5

# Frequently Asked Questions

## Account Setup

Question	Answer
<b>Do these changes apply to all former Bard businesses?</b>	<p>These changes apply only to the legacy Bard Access business. There is no change to existing business procedures or purchasing practices for:</p> <ul style="list-style-type: none"><li>• BD Peripheral Intervention (legacy Bard Peripheral Vascular)</li><li>• BD Surgery (legacy Bard Davol)</li><li>• BD Urology and Critical Care (legacy Bard Medical/Urological)</li></ul>
<b>Will I retain my current account numbers?</b>	<p>Existing BD customers will retain their BD account number.</p> <p>Bard Access Sold-To / Ship-To Account numbers will be converted to BD account numbers, which are 10 numeric characters in total and begin with: 100XXXXXXX.</p> <p>If no BD account number currently exists, one will be assigned.</p>
<b>When will new BD account numbers become effective?</b>	<p>Effective Friday, July 1, (but not earlier than close of business on Thursday, June 30) the BD account number must be used for all transactions, including order placement. Additionally, Bard Access products must be reassigned to the BD Medical Vendor Code/ID.</p>
<b>Will there be changes to processing Sales &amp; Use Tax Exemptions?</b>	<p>A Sales &amp; Use Tax Exemption certificate, referencing Becton Dickinson as the seller, is required to be on file to avoid tax charged on future BD invoices. Existing Bard Access customers that do not already have an exemption certificate on file with BD will need to submit one prior to July 1.</p>
<b>How can I update or submit my tax exemption certificate?</b>	<p>Updated exemption certificate issued to seller Becton Dickinson can be emailed to <a href="mailto:Taxinquiries@bd.com">Taxinquiries@bd.com</a> or mailed to BD, Attn. Indirect Tax, 5859 Farinon Dr. San Antonio, TX 78249.</p>

# Frequently Asked Questions

## Order Management

Question	Answer
<b>Do I have to make any changes to my current Bard Access product lists?</b>	On Friday July 1, please move all Bard Access products to your existing BD Medical item master. No changes are required for other legacy Bard divisions/products.
<b>Will there be changes to my ordering channel?</b>	Order placement for Bard Access products will continue to be made available via EDI, email, fax, or phone call. Continue to place your orders for Bard Access products through your current order channel, using the BD Vendor/ID code and your new BD account number.
<b>Can I place my orders through EDI?</b>	Existing EDI customers can continue to order Bard Access products using your current Bard vendor EDI setup until June 30, 1:30 p.m. EST.  Effective July 5, orders for Bard Access products must use your BD Medical vendor code/EDI setup.
<b>Can I combine my orders with other BD products?</b>	<del>No, Bard Access products should not be mixed with other BD products on the same purchase order, as these products will be shipped from a separate warehouse.</del>  Bard Access products can be ordered separately, as they are now, or they can be combined with BD Medical orders.
<b>What will happen to unfilled or backordered products during the cutover?</b>	Any unfilled/backordered products will be transferred to the BD system as part of the cutover process. The original Purchase Order number reference will be retained, and a new BD Sales Order number assigned for the unfilled products.
<b>Terms and Conditions of Sale</b>	Effective July 1, Bard Access products will be governed by the BD Terms and Conditions of Sale.
<b>How can I get order status?</b>	Order status inquiries can be made using the BD Customer Care portal at <a href="https://bd.com/customer-care">bd.com/customer-care</a> .
<b>How should I remit payment for products invoiced from BD?</b>	Payments for invoices generated after July 1 to be made to the appropriate BD lockbox as indicated on the invoice. Payments for invoices generated prior to July 1 to be made to the C.R. Bard lockbox as indicated on the invoice.

## Distribution and Transportation

Question	Answer
<b>Will my shipping change?</b>	Bard Access products will continue to be shipped from the Bard Global Distribution Center in Covington, GA, and will not be combined with shipments of other BD products. Packing lists and documentation will transition to an external label and will no longer be located inside the package.

# Frequently Asked Questions

## Claims Resolution & Return Requests

Question	Answer
<b>How will claims and return requests be handled for Bard Access products?</b>	<a href="mailto:SLC.CS@bd.com">SLC.CS@bd.com</a> will continue to serve as a single point of contact regarding return requests and claims.

## Contracts

Question	Answer
<b>Will there be changes to customer contracts in the BD system?</b>	Bard Access contracts will move “as is” into the BD system, with existing pricing unchanged. A new contract/agreement number will be assigned and will be reflected on future contracts or revisions. Effective July 1, all current and future contract notifications will reference the new BD Contract number and will no longer reference the Bard Access contract number.

## Cutover & Go-Live

Question	Answer
<b>When will the BD system go live?</b>	Our cutover activities will begin Thursday afternoon, June 30 and run through Monday, July 4. During this period, no orders or shipments will be processed for the in-scope products. Orders and shipments will resume on Tuesday, July 5.

BD, Franklin Lakes, NJ, 07417, U.S.  
201.847.6800

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