

ESPM

UCB BEARBUY

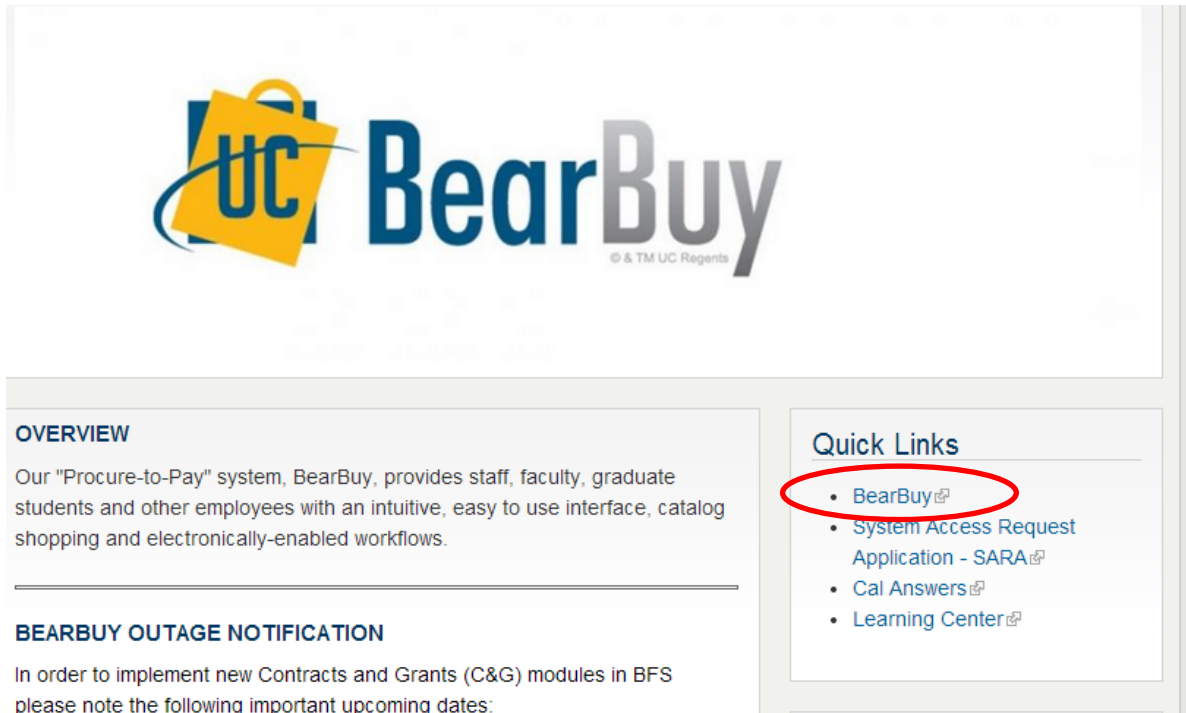
ENVIRONMENTAL
SCIENCE
POLICY
MANAGEMENT

A Tutorial Guide for Domestic Travel Reimbursements in BearBuy

PREPARED BY THE DEPARTMENT OF
ENVIRONMENTAL SCIENCE, POLICY, & MANAGEMENT

Domestic Travel Reimbursement

- Go to the BearBuy homepage (<http://procurement.berkeley.edu/bearbuy>) and select the BearBuy link on the right-hand side



UC BearBuy
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OVERVIEW

Our "Procure-to-Pay" system, BearBuy, provides staff, faculty, graduate students and other employees with an intuitive, easy to use interface, catalog shopping and electronically-enabled workflows.

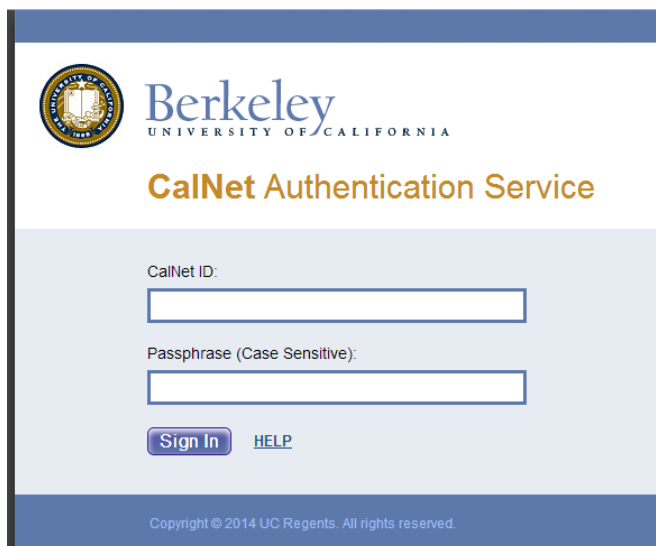
BEARBUY OUTAGE NOTIFICATION


In order to implement new Contracts and Grants (C&G) modules in BFS please note the following important upcoming dates:

Quick Links

- [BearBuy](#)
- [System Access Request Application - SARA](#)
- [Cal Answers](#)
- [Learning Center](#)

- Sign in with your CalNet ID and Password



 **Berkeley**
UNIVERSITY OF CALIFORNIA

CalNet Authentication Service

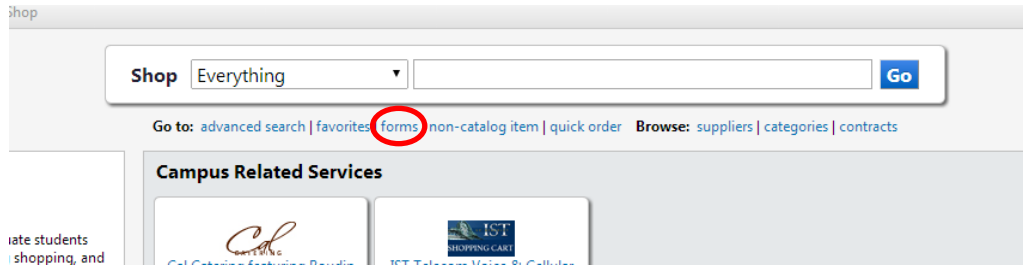
CalNet ID:

Passphrase (Case Sensitive):

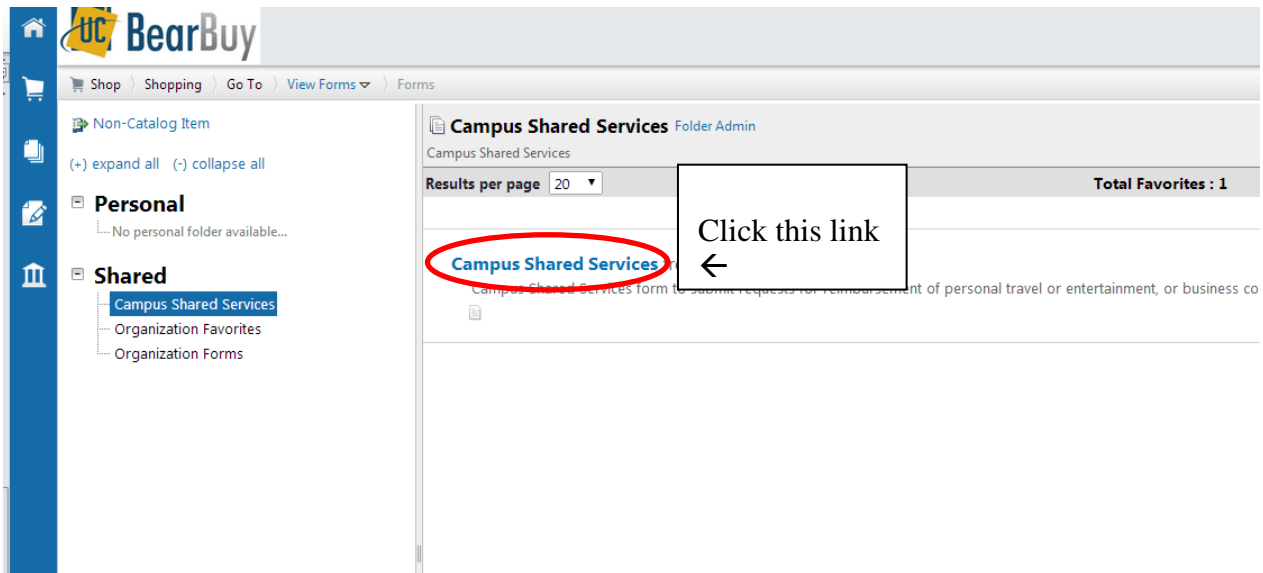
[Sign In](#) [HELP](#)

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- Select the forms link at the top of the page



- Click on the Campus Shared Services link



- A new box should pop-up on your screen. This pop-up is your reimbursement form.
 - a. Enter in your first and last name
 - b. Enter your contact information: email and phone
 - c. You can enter in Alyssa Fong for the Department Contact Name, and a.fong@berkeley.edu; (510)643-4554 for the contact information.
 - d. Select "Travel Reimbursement" for the activity type

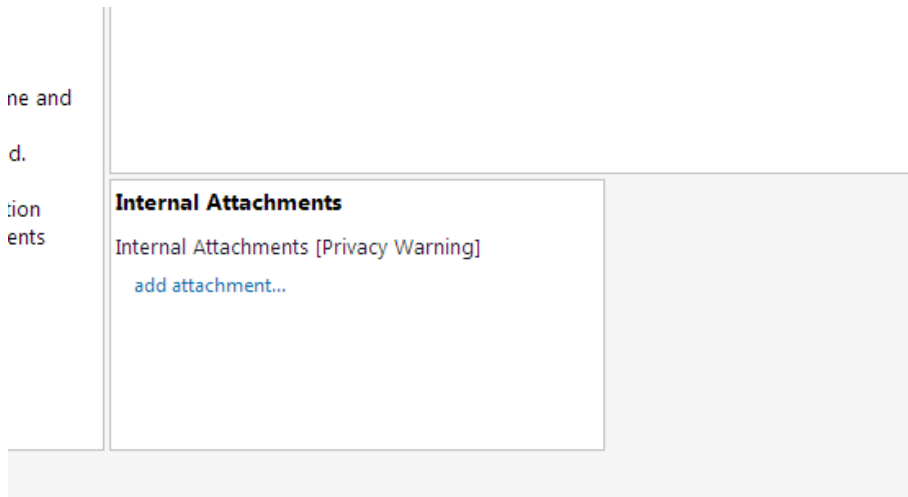
CSS Non-Purchase Request

Supplier	Campus Shared Services
Fulfillment Address	001, BFS ID: 0000822080: 1608 4th Street Berkeley, CA 94704 US
Supplier Phone	+1 (510) 664-9000
Traveler or Host Name	<input type="text"/>
Traveler or Host: Contact Email and Phone	<input type="text"/>
For Business Contracts or Inquiries:	
Department Contact Name	<input type="text"/>
Email and Phone	<input type="text"/>
Please indicate activity type:	<input type="text" value="Travel Reimbursement"/>

- Enter in the item/supplies that were purchased and describe what they were used for.
Enter in the price (include tax)

Expense Information		
Expense Information	Quantity	Estimated Amount
<input style="width: 95%; height: 35px;" type="text"/> <small>254 characters remaining</small>	1	<input style="width: 80%; height: 20px;" type="text" value="1.00"/>
<small>expand clear</small>		
Expense Information Total:		1.0

- Scroll to the very bottom of the page. Upload receipts, event agenda/flyer/poster, attendance list, and the Domestic Travel Reimbursement Form (**See steps 8 & 9**). **Please note that all attachments must be in PDF format.**



- Fill out and attach the Domestic Travel Reimbursement Form. To access the Domestic Travel Reimbursement Form, scroll about midway to the top of the form and select the Domestic Travel Reimbursement Form link. This link will direct you to another shared services link. Please select the first link, “Domestic Travel Reimbursement Form”

- Download and complete the appropriate form for your expense type.
 - [Domestic Travel Reimbursement Request Form](#)
 - [International Travel Reimbursement Request Form](#)
 - [Entertainment Reimbursement Form](#)
- Obtain unit and department approval signatures on the request form. Scan the form and supporting documents.
- On the CSS Non-purchase Request form, enter traveler or host name and contact information.
- Select the activity type from the drop down menu.
- Attach all required documents and receipts using the Internal Attachments tool.

NOTE: Please do not upload personally identified

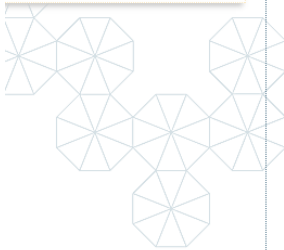
Expense Information	
Expense Information	Quantity
<div style="display: flex; justify-content: space-between; font-size: 0.8em;"> 254 characters remaining expand clear </div>	1
Expense Information Total:	

HOW CAN WE HELP YOU?

- Procurement
- Recharge
- Travel & Entertainment
- Service Level Agreement
- B&FS Process Maps

REQUEST SERVICE

- Telephone
- Email
- Submit a ticket
- Bearbuy Request Service - B&FS



- BUSINESS AND FINANCIAL SERVICES
- HR AND ACADEMIC PERSONNEL SUPPORT
- INFORMATION TECHNOLOGY (IT)
- RESEARCH ADMINISTRATION

Travel & Entertainment Reimbursement Forms

- Domestic Travel Reimbursement Form (New!)**
- Domestic Travel Form Instructions
- About SmartForms
- Hard Copy Printable Blank Form

- International Travel Reimbursement Form
- International Travel Form Instructions
- Fillable PDF form – please use Chrome, Safari, or Internet Explorer, OR download the document and open it in the Adobe Reader program

- Entertainment Personal Reimbursement Form
- Personal Entertainment Form Instructions
- Fillable PDF form – please use Chrome, Safari, or Internet Explorer, OR download the document and open it in the Adobe Reader program

- Entertainment Payment to Vendor Form
- Entertainment Payment to Vendor Form Instructions
- Fillable PDF form – please use Chrome, Safari, or Internet Explorer, OR download the document and open it in the Adobe Reader program

- Domestic Travel Reimbursement Request Form

Berkeley Campus Shared Services

DOMESTIC TRAVEL REIMBURSEMENT CLAIM FORM
Form and all receipts must be submitted within 60 days of completion of travel

[Instructions](#)

Preparer's Name: Phone: Email: Dept.:
(Fill only if other than traveler)

PAYEE

Name: (Last, First) Phone: Email: Dept.: City of Res.:

UCB Employee UCB Student Other Emp/Stu/Ven ID: If not currently a vendor, you will be contacted by CSS for more information

Affiliated Professor/Lab: (Optional) US Citizen/Permanent Resident? Yes No
If no, you will be contacted by CSS for [more information](#) (Passport, I-94, UC-W-8BEN, COAA)

TRIP

Business Purpose: (Attach backup, e.g. Agenda, etc.)

Personal Time/Special Circumstances: (Date(s), time, location, etc.)

Destinations:

Depart: Home Office Date: Time: a.m. p.m.

Return: Home Office Date: Time: a.m. p.m.

PRIVATE CAR Personal Automobile Used?

AIR Air Expenses? (Attach itinerary, showing proof of payment)

OTHER TRANSPORT Other Transportation Used? (Bart, Shuttle, Taxi, Etc.)

OTHER EXPENSE Other Misc. Expenses? (Gas, Tolls, Phone, Internet, Baggage, Etc.)

DAILY EXPENSES Daily Expenses? (Lodging, Meals & Incidentals, Etc.)

		1 Calculate Total Expenses	ESTIMATED TOTAL EXPENSES	\$0.00
Reductions: 1. Travel Advance? <input type="radio"/> Yes <input type="radio"/> No		Attach original request	Amount	-0.00
Enter amount as negative numbers		2. Other Reductions?	Amount	0
		2 Calculate Estimated Reimbursement	ESTIMATED TOTAL REIMBURSEMENT NOT TO EXCEED	\$0.00

COA

ACCOUNT (OPT)	FUND	DEPT. ID	PROGRAM	CF1	CF2	AMOUNT
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00

Check If You Need Additional COA

OPTIONAL: Accounting Approval (Department specific)

CERTIFICATION

I certify that the above is a true statement, that the expenses claimed were incurred by me on official University business on the date shown, and that I have attached original receipts for each expense of \$75 or more, as required by University policy.

Traveler's Signature: Name: Title: Date:

I authorize these expenditures and approve this claim to be submitted for review of University policy compliance.

Authorizer's Signature: Name: Title: Date:

Enter in details about the purpose of the trip

Leave section blank; have PI enter chartstring

PI Signature →

2
 go to cart using the link at the
 Cart Details option using the
 right of the screen.
 de, if missing.
 mit cart option using the button at
 the screen.

is [facilitation or inquiries](#)
 the department contact name and
 on.
 estion in the description field.
 ie amount field.
 rting documents or information
 it using the Internal Attachments

is:

[olicy](#)

Attachments

Privacy Warning: Do not upload any document in BearBuy, or any other website applicatio notice triggering data and the home & family data is blacked out and **completely unreadable** approach is to remove this data from the document before uploading it. [Data Privacy]

Internal Attachments
 Internal Attachments [Privacy Warning]
 add attachment...

Total

- Scroll to the top of the reimbursement form and select “add and go to cart” to assign the cart

Available Actions: Add and go to Cart

CSS Non-Purchase Request

Campus Shared Services
 001, BFS ID: 0000822080:
 1608 4th Street
 Berkeley, CA 94704 US

Phone: +1 (510) 664-9000

IP Host Name:

IP Host: Contact Email and:

Business Contracts or Inquiries:

Department Contact Name:

- Enter in a new cart name that can be easily recognized by your PI and press save

Name before:

Shopping Cart for Alyssa Fong

Save

Cart Name: 2014-05-21 012579068 01

Description:

Priority: Normal

Prepared For: Alyssa Fong

Supplier / Line Item Details

Name after:

Shopping Cart for Alyssa Fong

Save

Cart Name: Supplies purchased for...

Description:

Priority: Normal

Prepared For: Alyssa Fong

- After you have re-named the cart, assign it to your PI by selecting “Assign Cart” in the top right-hand corner

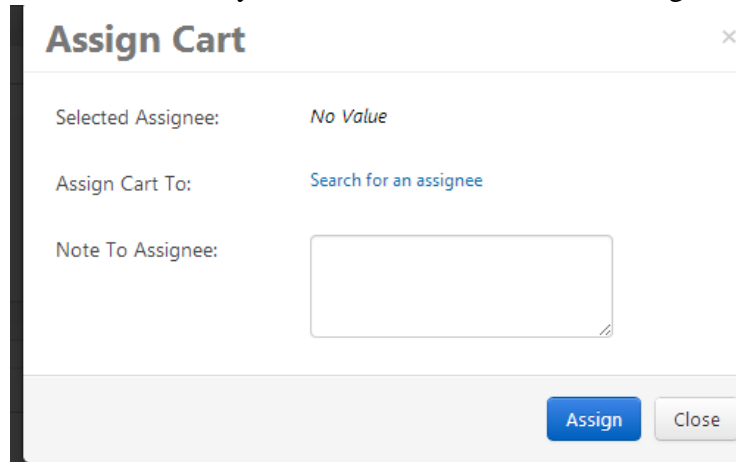
Submitted. the errors.

Continue Shopping

1 Item(s) for a total of 1.00 USD

Save View Cart Details Assign Cart

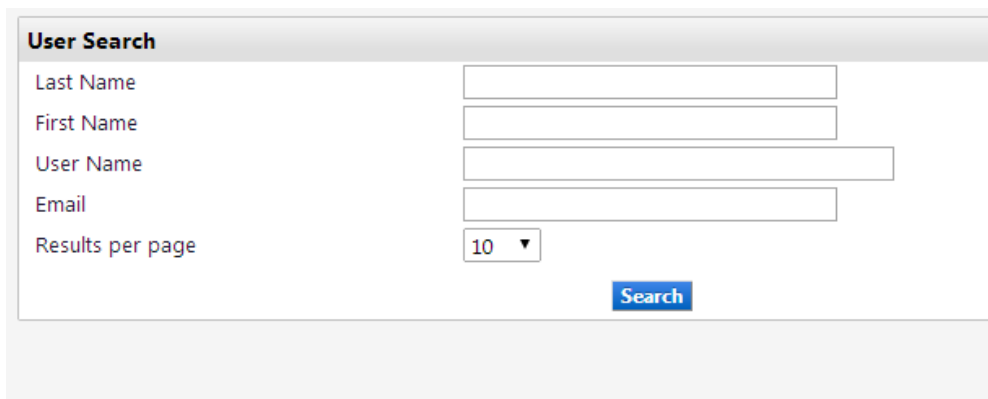
- To choose the name of your PI, select “Search for an assignee”



The image shows a dialog box titled "Assign Cart" with a close button (X) in the top right corner. It contains the following fields and controls:

- Selected Assignee:** No Value
- Assign Cart To:** Search for an assignee (a blue link)
- Note To Assignee:** A text area for entering a note.
- Buttons:** "Assign" (blue) and "Close" (grey).

- Enter in the PI’s last name and first name and then press “search”



The image shows a "User Search" form with the following fields and controls:

- Last Name:** Text input field
- First Name:** Text input field
- User Name:** Text input field
- Email:** Text input field
- Results per page:** Dropdown menu set to 10
- Search:** Blue button

15. Click on the name of the approver and the cart will be assigned for their approval.