

# ESPM

UCB BEARBUY

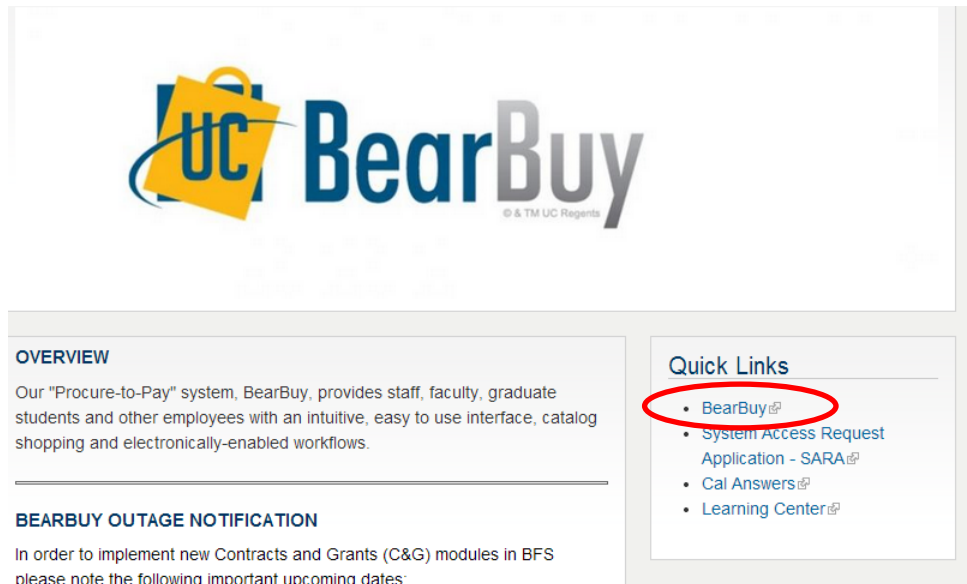
ENVIRONMENTAL  
SCIENCE  
POLICY  
MANAGEMENT

## **A Tutorial Guide for Entertainment Reimbursements in BearBuy**

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

# Entertainment Reimbursement

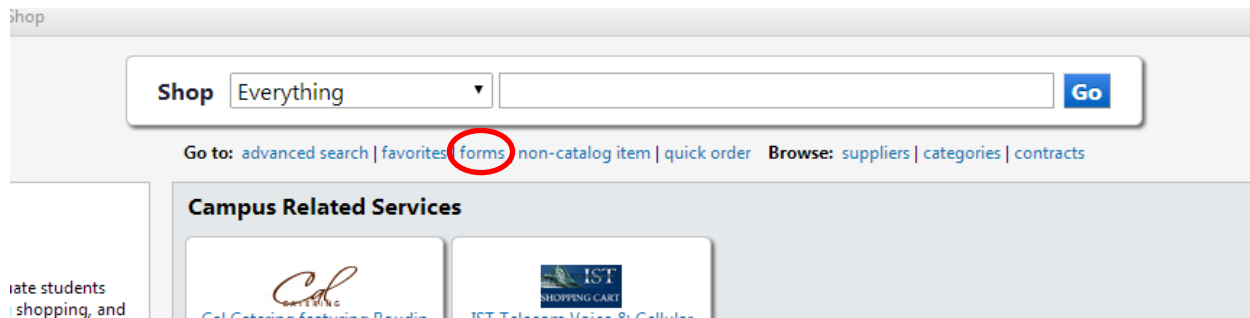
- Go to the BearBuy homepage (<http://procurement.berkeley.edu/bearbuy>) and select the BearBuy link on the right-hand side



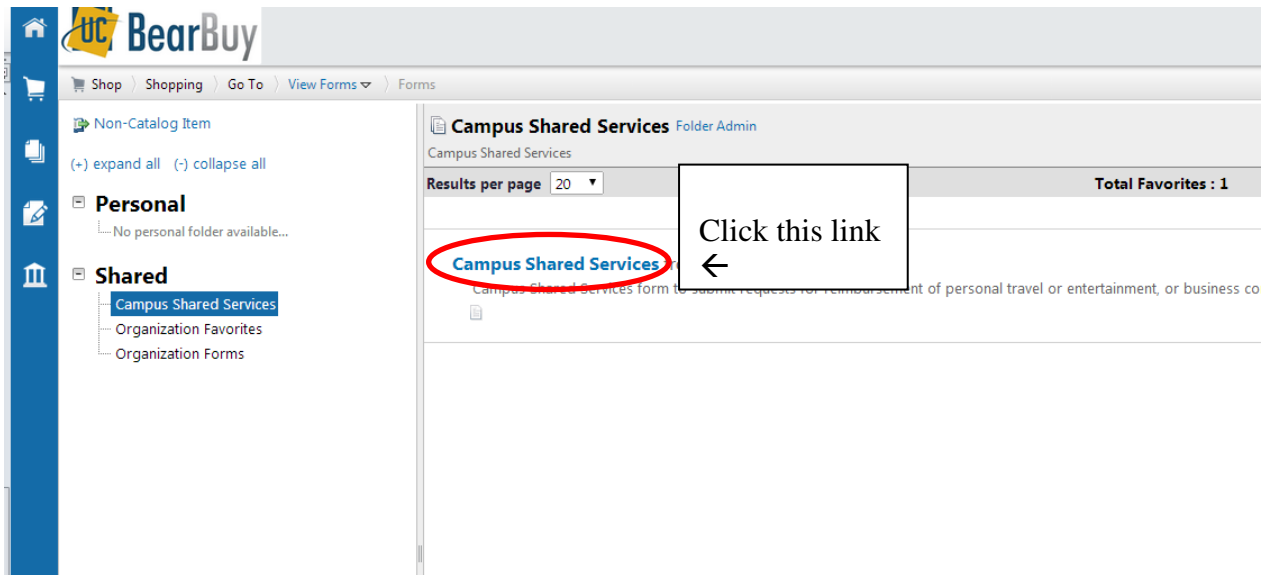
- Sign in with your CalNet ID and Password



- Select the forms link at the top of the page



- Click on the Campus Shared Services link



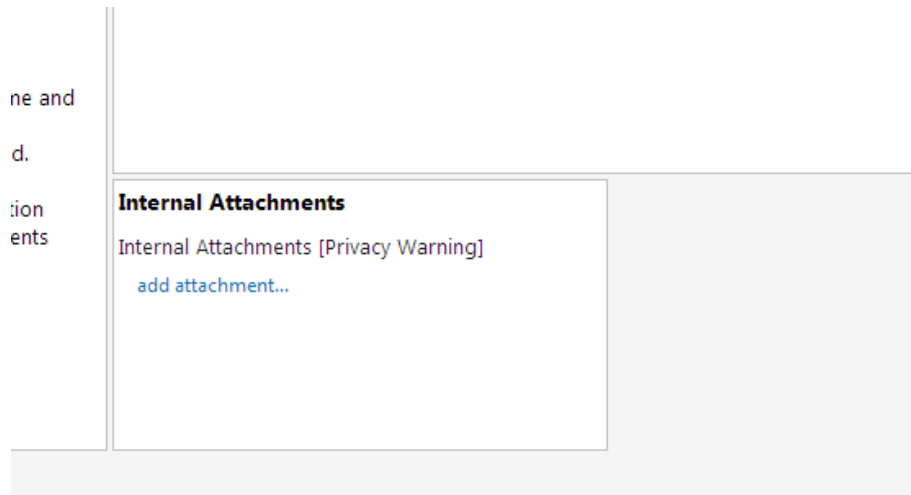
- A new box should pop-up on your screen. This pop-up is your reimbursement form.
  - a. Enter in your first and last name
  - b. Enter your contact information: email and phone
  - c. You can enter in Alyssa Fong for the Department Contact Name, and [a.fong@berkeley.edu](mailto:a.fong@berkeley.edu);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

<b>Supplier</b>	Campus Shared Services
<b>Fulfillment Address</b>	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"/>
<b>For Business Contracts or Inquiries:</b>	
Department Contact Name	<input type="text"/>
Email and Phone	<input type="text"/>
<b>Please indicate activity type:</b>	Entertainment 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 type="text"/>	1	<input type="text" value="1.00"/>
254 characters remaining <a href="#">expand</a>   <a href="#">clear</a>		
<b>Expense Information Total:</b>		<b>1.0</b>

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



- Fill out and attach the Entertainment Reimbursement Form. To access the Entertainment Reimbursement Form, scroll about midway to the top of the form and select the Entertainment Reimbursement Form link. This link will direct you to another shared services link. Please select the third link, "Entertainment Personal Reimbursement Form"

*For Campus Shared Services-supported units only.*

To place a request with **Campus Shared Services, Business & Financial Services** for:  
 Personal Travel & Entertainment reimbursement  
 Business Contracts facilitation

All other purchase requests should be submitted directly via the BearBuy catalogs or appropriate BearBuy form.

**Form Instructions:**

General: Depending on your request type (Travel & Entertainment or Business Contracts), fill out the applicable fields. For technical reasons enter "1" in the Estimated Amount Field. This does not affect the request in any way. Your request will be processed according to the documentation submitted.

[Personal Travel and Entertainment Reimbursement](#)

1. Download and complete the appropriate form for your expense type.

[Domestic Travel Reimbursement Request Form](#)  
[International Travel Reimbursement Request Form](#)  
[Entertainment Reimbursement Form](#)

**For Business Contracts or Inquiries:**

Department Contact Name

Email and Phone

**Please indicate activity type:**

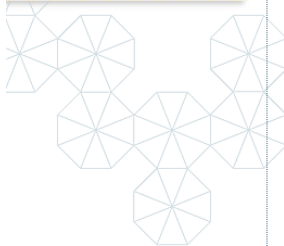
Expense Information <span style="float: right;">?</span>		
Expense Information	Quantity	Estimated Amount
	1	\$00

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

- Entertainment Reimbursement Request Form

## ENTERTAINMENT REIMBURSEMENT REQUEST

FORM AND RECEIPTS MUST BE SUBMITTED WITHIN 21 DAYS OF EXPENDITURE

Date: \_\_\_\_\_ Dept: ESPM Preparer: Your name

Enter in Payee info →

PAYEE	<input type="checkbox"/> UC Employee <input type="checkbox"/> Student <input type="checkbox"/> Existing Vendor <input type="checkbox"/> Other: _____
	Name: _____ Emp/Stu/Ven ID: _____
	E-Mail: _____ Address: _____
	Phone: _____ City/ST/Zip: _____

Enter in Event purpose info →

EVENT PURPOSE	Event Purpose: _____
	Event Date(s): _____
	Event Host: _____ <b>Host must be present at meal</b>
	Event Location: _____
	Meal Type: <b>Attach all receipts showing meal details - maximum per person expenditures include tax, labor, service charge, gratuity</b>
Breakfast \$26.00 maximum    Dinner \$78.00 maximum    Alcohol Served Lunch \$45.00 maximum    Light Refreshments \$18.00 maximum <input type="checkbox"/> Yes <input type="checkbox"/> No	

Enter in Event attendee info →

ATTENDEES	Number of Attendees: _____ Total Cost of Meal: _____ Cost per Attendee: _____																																											
	Additional Costs:																																											
	Room Rental _____ Other _____																																											
	Audio/Visual _____ Explain _____																																											
	Attendee List - Attach separate list if more than 10 guests <b>Include Name, Affiliation, Business Relationship with the University</b>																																											
<table border="1"> <thead> <tr> <th>Attendee Name</th> <th>Institution</th> <th>Affiliation</th> <th>Business Relationship</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>	Attendee Name	Institution	Affiliation	Business Relationship																																								
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If more than 10 guests, please write "see attached guest list"

Leave blank unless stated otherwise →

EXCEPTIONS	<input type="checkbox"/> Social Activities & Entertainment <input type="checkbox"/> Spouse/Partner of University Guest or Host Included <input type="checkbox"/> Employee Morale Building Activity <input type="checkbox"/> Dean Attended <input type="checkbox"/> Amount Exceeded Per Person Limit <input type="checkbox"/> Other _____
	University Business Purpose Justifying Exceptional Circumstances
	_____

Leave blank →

COA	<table border="1"> <thead> <tr> <th>Account</th> <th>Fund</th> <th>Dept</th> <th>Program</th> <th>CF 1</th> <th>CF 2</th> <th>\$ Amount</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>	Account	Fund	Dept	Program	CF 1	CF 2	\$ Amount																													Accounting Approval (Dept Specific)
	Account	Fund	Dept	Program	CF 1	CF 2	\$ Amount																														
	_____																																				

Obtain PI signature ←

Sign and date where it says "host signature" →

HOST CERTIFICATION	I certify that the above is a true statement, that the expenses claimed were incurred by me (if requesting reimbursement) or by my Department for official University business on the date(s) shown, and that the expenses are within the regulations of the University of California.	
	Host Name and Title: _____	Date: _____
	Host Signature: _____	Date: _____
	Fund PI/PD/Designate Name and Title: _____	Date: _____
	Fund PI/PD/Designate Signature: _____	Date: _____
	Exceptional Approval Name and Title: _____	Date: _____
	Exceptional Approval Signature: _____	Date: _____

- Print and attach the Entertainment Form to the “pop-up” reimbursement form. **Please make sure that you have your form signed by your PI before you upload it.**

...to go to cart using the link at the

...with Cart Details option using the right of the screen. ...de, if missing. ...mit cart option using the button at the screen.

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

...: [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 unreada** 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 Go Close

**CSS Non-Purchase Request**

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

Phone +1 (510) 664-9000

Server Host Name

Server Host: Contact Email and

**Business Contracts or Inquiries:**

Business 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

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

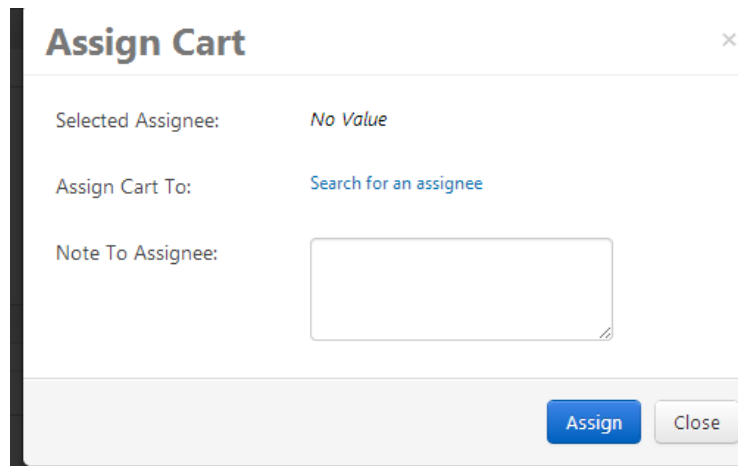
Submitted. the errors.

Continue Shopping

1 Item(s) for a total of 1.00 USD

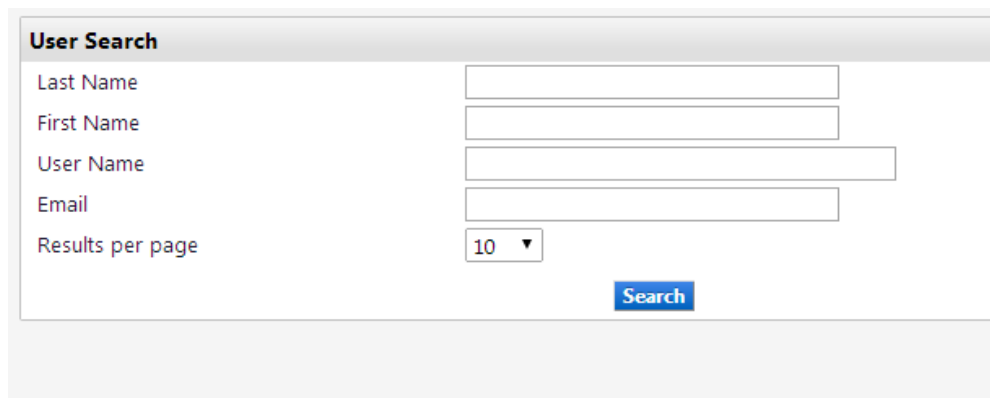
Save View Cart Details Assign Cart

- 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 three fields: "Selected Assignee:" with the value "No Value", "Assign Cart To:" with a blue link "Search for an assignee", and "Note To Assignee:" with an empty text area. At the bottom right, there are two 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 a grey header. It contains five input fields: "Last Name", "First Name", "User Name", "Email", and "Results per page" (a dropdown menu set to "10"). A blue "Search" button is located at the bottom right of the form.

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