

America To Go Requisition/Cart Quality Checklist

This requisition quality check list is designed to aid Requisition Creators in determining what documents/information must be present in the cart/requisition before they can process the order. To view the full Entertainment policy, please refer to the [Expenditures for Business Meeting, and Other Occasions UCOP policy \(BUS-79\)](#)¹.

List of Exceptional Approval Event Types & Required sign-off

Event Type	Host Approval	Exceptional Approval
Recruitment, Employee, Student-Athlete, Scholar	✓	
Entertainment (Donor Meals and Fundraisers)	✓	
Entertainment, Community or Guest Social Activities	✓	
Event Costs Exceeds Dollar Limits	✓	✓
Event Costs Exceeds Dollar Limit by 200% or more	✓	Chancellor (not designees)
Entertainment, Meals to Partners/Spouses	✓	✓
Entertainment, Cash Contribution	✓	✓
Employee Morale-Building Activities	✓	✓

Checklist

	Regular Orders <\$1,000 (not including tax and tip)	Regular Orders >\$1,000 (not including tax and tip)	Exceptional Approval Orders
Singed and completed Entertainment Authorization Form ² : · Entertainment Authorizer name and signature required.	✓	✓	✓
Host name must be listed on the form (a host signature is not required).	✓		
Host name and signature are required.		✓	✓
Guest list – including name, title and affiliation to establish the business-related purpose ³ .	✓	✓	✓
Exceptional Entertainment Section completed and signed by authorized exceptional approver.			✓
Can't be charged to state funds.			✓
Ship to address is present on requisition/cart.	✓	✓	✓
Correct entertainment account code ⁴ used on the transaction.	✓	✓	✓
Line item detail matches information on the Entertainment Authorization Form.	✓	✓	✓
Correct activity type selected – based on the most stringent type of event	✓	✓	✓

For additional information on Entertainment documentation requirements, please contact the Disbursement help desk at disburse@berkeley.edu

For question regarding processing these orders in BearBuy please contact the BearBuy Help Desk at bearbuyhelp@berkeley.edu

For question regarding orders placed with ATG please contact the America To Go Customer Care 866-ATG-TOGO or 866-284-8646

¹ UCOP BUS-79: <http://policy.ucop.edu/doc/3420364/BFB-BUS-79>

² Entertainment Authorization Form: <http://procurement.berkeley.edu/buying/forms>

³ Guest List: If impractical to list each guest based on the open nature of the event, names and titles are not required. Sufficient detail about guest occupations or affiliations must be provided to establish business purpose.

⁴ List of entertainment account codes: <http://controller.berkeley.edu/entertainment-account-codes-0>