20-30 Webinar Series:
#1 After the Fact vs Payment Request
Agenda

1. About this Session
2. After the Fact Form Overview
3. Payment Request Form Overview
4. Resources & Support
5. Question and Answer
About this Session

- Intended for all BearBuy users
- 30 Minutes
- ATF & PRF Overview
- Question and Answer

ATF & PRF Forms  Q&A

15 min  15 min
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AFTER THE FACT FORM (ATF)
ATF Overview

Policy/Guidelines

• After the Fact purchases are "unauthorized purchase" per UCOP Bus 43 (http://policy.ucop.edu/doc/3220485/BFB-BUS-43).
• It is a purchase that has been committed to the vendor without proper authorization.
• After the Fact purchases are against policy and will be tracked for reporting purposes.
• A justification for why this transaction was an after the fact is required.

When & How to use:

• To pay for goods/services for which a purchase order should have been established but was not.
• Each supplier invoice should be submitted on a separate form.
• It is a requirement that you attach an invoice to the After the Fact request.
• Do not complete this form for purchases that have already been paid with a bluCard.

How to Avoid After the Fact Purchases:

• Request a PO prior to requesting services or goods from a supplier.
• Set up a blanket PO for multiple payments to the same supplier for emergency services you may need over a period of time.
• Do not approve a supplier to start services or deliver goods until you have a PO in place.
• Talk to your Central Procurement Buyer for advice on how to better plan purchases so you can avoid After the Fact purchases.
ATF Workflow In BearBuy

- After the Fact Requisition will route to a Requisition Approver (Org Node) regardless of amount.
- After the Fact Requisition will route to a Buyer when the amount >$5,000.
- After the Fact Purchase Orders are not sent to the Supplier.
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PAYMENT REQUEST FORM (PRF)
PRF Overview

Policy/Guidelines

- Payment Request Activities have different documentation requirements which must be attached to the Payment Request Form.
- Detailed information about the requirements is on the Disbursements Website.
- [http://controller.berkeley.edu/disbursements/FAQ/aboutDirectVouchers.htm](http://controller.berkeley.edu/disbursements/FAQ/aboutDirectVouchers.htm)

When & How to use:

- To pay an activity that does not require a Purchase Order (previously known as check requests).
- Each supplier invoice should be submitted on a separate form.
- It is a requirement that you attach an invoice to the Payment Request. Payment will not be processed without one.
- Do not complete this form for purchases that have already been paid with a bluCard.

Examples of usage on Campus:

- Conference Registration
- Donations, Gifts & Contributions
- Entertainment – Catering payment only
- Freight
- Honoraria
- Journal/Subscriptions
- Reimbursement to UC individuals for non-travel & non-entertainment expenses
- Utilities, telephone/data service, etc.
PRF Workflow In BearBuy

- Payment Request Requisitions will route to a Requisition Approver (Org Node) regardless of amount.

- Payment Request Purchase Orders are not sent to the Supplier.
RESOURCES & SUPPORT
Training Resources

• The BearBuy website is the source for the most up to date news, announcements and training resources
  – procurement.berkeley.edu/bearbuy

• BearBuy YouTube Channel
  – youtube.com/user/BearBuyProcurement

• Need more assistance? Contact the BearBuy help desk!
  – (510) 664-9000 Option 1, Option 2, Option 1
  – Mon-Fri 8 AM to 5PM
  – Email BearBuy Help (bearbuyhelp@berkeley.edu)
Thanks For Watching!