

Shopping - CA Partial Sales Tax Exemption Orders

Reminders!

Effective July 1, 2014 through June 30, 2022, the California State Board of Equalization (SBOE) is offering a <u>reduced sales/use tax rate on equipment purchased for research and development in biotechnology, physical engineering, and life sciences.</u>

To determine if a product qualifies for exemption, please visit the <u>Supply Chain Management</u> - <u>CA Partial Sales Tax Rate Exemption webpage</u>. It is the Department's responsibility to ensure the product being purchased qualifies for partial sales tax exemption. If it is later determined that the purchase does not qualify for the sales tax exemption, the department will be responsible for the additional tax assessment, fines, and interest.

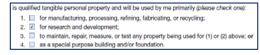
- ➤ UC Berkeley permit number is SR-CH-21-135302
- ➤ A <u>Partial Exemption Certificate for Manufacturing</u>, <u>Research and Development Equipment</u> (<u>BOE-230-M</u>) is required to be completed for every product and attached to every BearBuy cart.
- ➤ All qualifying catalog and non-catalog products, with the exception of Sole Source orders, must be ordered on the **Non-Catalog** form.
- ➤ Qualifying **Sole Source** orders must be placed on the Sole Source Over \$100K form and follow the same process and program requirements.
- ➤ Users cannot mix qualifying and non-qualifying products on the same cart. The cart will not be accepted if submitted with both product types.
- Tax related questions should be sent to Accounts Payable (disburse@berkeley.edu)
- Contact the BearBuy Help Desk for all other questions (bearbuyhelp@berkeley.edu).

Completing the Partial Exemption Certificate for Manufacturing, Research and <u>Development Equipment</u>

- Access the Partial Exemption Certificate for Manufacturing, Research and Development Equipment by going to http://www.boe.ca.gov/pdf/boe230m.pdf.
- 2. Enter Supplier name and order/fulfillment address in the Seller/Lessor name section. If you do not know the Supplier address, you can leave the address section blank.



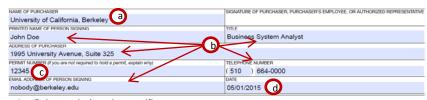
3. Identify how the product will be used by selecting the appropriate checkbox *(check only one)*.



4. Enter a precise description of the product being purchased. If you require additional space, please attach a separate sheet.



- 5. Read and review the purchaser section. Enter:
 - a. University of California, Berkeley as the Purchaser
 - b. The **Shopper's** name, title, address, and telephone number.
 - c. SR-CH-21-135302 as UC Berkeley's permit number (reseller number)
 - d. Date the document was signed.



6. **Print** and **sign** the certificate.

Placing Your Qualifying Order in BearBuy

- 1. Locate the Non-Catalog Form from the Frequently Used Forms section and:
 - a. Enter Supplier Name.
 - b. Enter appropriate Expense Information (Product description, qty, estimated unit price, etc).
 - c. Attach quote/estimate and sales tax exemption certificate as an External Attachment.
- 2. From the Available Actions drop-down menu, select Add and go to Cart, and press Go.

 Available Actions: Add and go to Cart

 Go Close
- 3. Select the **Shopping Cart icon** on the top right banner. From there select **Checkout**.



4. Navigate to the Buyer Info section within Requisition - Summary and select edit.



Select the CA Partial Sales Tax checkbox and click Save.



Continue to add the sales tax exemption certificate and/or additional comments, navigate to the Comments tab, and select Add comment.

Click the browse button to select the *partial sales tax exemption certificate*. Select the Add Comment button.

 Complete the shopping process: Populate the remaining requisition fields (e.g. ship to, Org Node, etc) and when ready, Assign or Submit the cart. Instructions on completing a BearBuy requisition can be found on the <u>Supply Chain Management BearBuy</u> <u>Instructional Resources site</u> (http://supplychain.berkeley.edu/bearbuy/instructional-resources-0).

Version Date 10/16/2015 Page **1** of **1**