



University of California
Berkeley



20/30 Webinar Series: #16

Amount Only vs Service Order Request Form

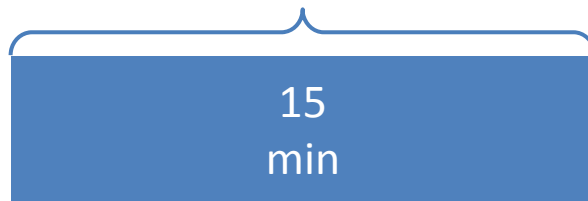
Agenda

1. About this Session
2. Amount Only vs Service Order Request Form
3. Resources & Support
4. Question and Answer

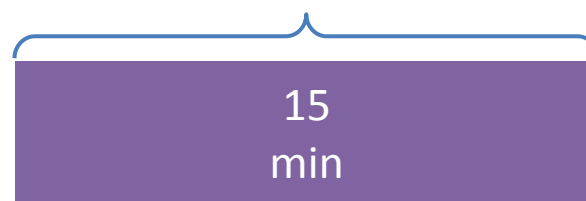
About this Session

- Users with little form knowledge
- 30 Minutes
- Amount vs Service forms
- Question and Answer

Amount vs Service Forms



Q&A



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Amount Only vs Service Request Form



Always Keep In Mind:

- **Competitive bidding should be conducted for non-contract based orders \geq \$5k**
- **Source Justification* is needed when:**
 - An item or service costs \$5,000 or more, Federal Funds are being used and no other product or service is available meeting the requirements.
 - An item or service costs \$10,000 or more and no other product or service is available meeting the requirements.
 - An item or service costs \$100,000 or more, the requirement **MUST** be competitively bid by an officially authorized University buyer.
- **Insurance Requirement:**
 - Suppliers, Independent contractors, consultants, and/or other service providers performing work/services under a PO for the University must include as part of their contractual obligation a provision to defend and hold the University harmless from any loss, injury, or damage occurring during the performance of their work, and must indemnify The Regents for any loss suffered as a result of negligence on the part of the contractors, consultants, affiliates, or service providers, including their employees, agents, and sub-contractors.

* The Source Justification documents that there is no alternative to the unique item or service specified on the Requisition.

Amount Only Form

When to use:

- When multiple bills are anticipated for a single item such as equipment rentals or fabricated equipment.
- To request 'amount-only' purchases for services and tangible goods that need to appear on the same PO.

Form Instructions

- This form will create an amount-only PO in BearBuy and BFS.
- The value entered in the Unit Price field will be the **PO Total**
- The Quantity field will always default to "1".
- Documents that should also be sent to the supplier should be attached as an **External Attachment**.
- All other documents can be attached as **Internal Attachments**

Policy/Guidelines

- BFB BUS-43 Material Management: <http://policy.ucop.edu/doc/3220485/BFB%20BUS-43>
- “It is the practice of the University of California to meet its need for common goods, materials, and services at the lowest overall total cost or best value, as applicable, while affording the maximum opportunity practicable to those who wish to become suppliers to the University. “



Service Order Request Form

When to use:

- To request service related and 'amount only' purchases.
 - Services are defined as labor performed for another, or useful labor that may or may not produce a tangible commodity.
 - Service includes, but is not limited to: bookstore operation, use of security guards, transportation, computer programming, clothing rental and cleaning, laundry, tests and analysis, film processing, janitorial work, window washing, rubbish and waste removal, and service and repairs to office equipment, transportation equipment, laboratory and medical equipment, and musical instruments.

Form Instructions

- This form will create an amount-only PO in BearBuy and BFS.
- The value entered in the Unit Price field will be the **PO Total**.
- The Quantity field will always default to "1".
- If services should be marked taxable, shopper can select the **Taxable flag**.
- A campus department contact name must be associated to this transaction.
- Documents that should also be sent to the supplier should be attached as an **External Attachment**.
- All other documents can be attached as **Internal Attachments**

Policy/Guidelines

- [BUS 43, Part 1: Purchase Transactions](#), pgs 13-28
- [Statement of Work Guidelines](#)
- [Source Selection Justification](#)




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RESOURCES & SUPPORT



Resources & Support

- The BearBuy website is the source for the most up to date news, announcements and training resources
 - supplychain.berkeley.edu/bearbuy
- BearBuy Job aids, Guides & Materials are available at
 - supplychain.berkeley.edu/bearbuy/instructional-resources-0
- BearBuy YouTube Channel - Short demos videos!
 - youtube.com/user/BearBuyProcurement
 - Subscribe to receive notifications when new videos are posted.
- BearBuy Help Desk #1 place to stop for help:
 - (510) 664-9000 Option 1, Option 2
 - Mon-Fri 8 AM to 5PM
 - [Email BearBuy Help](mailto:bearbuyhelp@berkeley.edu) (bearbuyhelp@berkeley.edu)
- Follow us on Instagram! 
 - Another source of receiving news about upcoming events
 - http://instagram.com/ucb_bearbuy?ref=badge





Questions?

*Please send all related question to
bearbuyhelp@berkeley.edu*