

America To Go Match Exception Quality Checklist

This match exception quality check list is designed to aid Match Exception Preparers in determining what documents/information must be present on an ATG match exception voucher before force matching it. Only if the voucher should be paid, should the Match Exception Preparer force match the voucher.

All match exception resolutions must be completely documented using the comments feature in BearBuy. Instructions on resolving Match Exceptions in BearBuy can be found on the [BearBuy Instructional Resources webpage](#)¹.

To view the full Entertainment policy, please refer to the [Expenditures for Business Meeting, and Other Occasions UCOP policy \(BUS-79\)](#)².

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 | ✓ | ✓ |

To comply with Entertainment Policy, America To Go match exceptions that include approving increases in quantity or price must include the following:

| On all ATG Match Exceptions | |
|-----------------------------|--|
| | A revised cost per person dollar amount that reflect the actual expenditures for the event. |
| | A final guest list – detailing name, title and affiliation with University. |
| | Approval from the Event Host (visible on the revised Entertainment Authorization Form) |
| | Approval from the Event Approver for the increase (visible on the revised Entertainment Authorization Form) |
| | An exceptional approval signature is required for all exceptional entertainment expenses (as shown in chart above) |
| | Expenses requiring exceptional approval, and amounts in excess of per-person limits can't be charged to state funds |

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 BearBuy Instructional Resources website: <http://procurement.berkeley.edu/bearbuy/instructional-resources>

² UCOP BUS-79: <http://policy.ucop.edu/doc/3420364/BFB-BUS-79>