Supply Chain Management

Using the Services and Non-Tangible Items Form in BearBUY
For more information and training resources, please see the BearBUY website.

⚠ IMPORTANT THINGS TO KNOW BEFORE YOU PROCEED... ⚠

Use this form for:
- Services (quoted, independent contractor, software, cloud services, and/or restricted) and any associated goods.

Do NOT use this form for:
- Recurring rental expenses.
- Goods and associated services.

You do NOT need to fill out the bottom sections (Price Rationale and Source Justification) of this form if:
- The order is less than $10,000.
- A contracted supplier is used.

Need to place an order that exceeds $10,000 or have an order that falls under the Special Considerations category? Consult with a Buyer, PRIOR to completing your order.

Still unsure? Check out the “What Form Should I Use?” page for assistance.

After selecting your supplier, check to see if there is an existing contract to add to your form by selecting select contract...

Existing Contracts:
- The fastest procurement option is to use an existing contract. To see a list of potential contracts: UCB BearBuy Contracts Module. For access to UCOP’s CalUsource systemwide contracts, contact your Buyer.
- If the supplier has an existing agreement in Bear Buy, click on “SELECT CONTRACT...” to associate it to the order.

Contract:

If a contract exists, make the appropriate selection (if multiple contracts exist) and click OK to add it to your form.

Select Contract

Select Contract
- No Contract
- 92UIT-2020-24 (Xerox-2021)

Time Saving Tip! If a contract is selected, this form will skip buyer review and save you time!

Next, fill out the Order Information section accordingly. Please Note: The fields in bold text are required. If a required field is not applicable to your order, please enter N/A in the field.

Order Information

Proposal/Quote No.
Prior Year PO Number (if applicable)

Estimated Frequency of Service*

Service Start Date

[Please select...]

Once you reach the last question in the Order Information section, you can scroll up to the top of the form and select Add and go to Cart from the dropdown list at the top right to proceed with your purchase IF you were able to apply an existing contract to your form or your total purchase is less than $10,000.

Available Actions: Add and go to Cart ⚡ Go Close
ATTENTION:

- IF your total purchase is between $10,000 and $100,000, please complete the Price Rationale section. NOTE: This section does NOT need to be filled out IF an existing contract is selected or the total purchase is under $10,000.

![Price Rationale Time Saving Tip! Skip this section for orders under $10,000 OR if you selected a contract number above!](image)

How do you know that your intended purchase is reasonably priced? Check all that apply and include an explanation below.

<table>
<thead>
<tr>
<th>Quotes</th>
<th>Published Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compared to quotes received from</td>
<td>Compared to current published</td>
</tr>
</tbody>
</table>

- IF your order is federally funded and over $10,000 or over $100,000, skip the Price Rationale section and attach a Source Selection and Price Reasonableness form at the end of this form.

![Source Justification](image)

If you did not choose the lowest price of the pricing options presented to you, tell us why. Check all that apply and include an explanation below.

<table>
<thead>
<tr>
<th>Research Continuity</th>
<th>Unique Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item needed to maintain research</td>
<td>Item has unique features that meet</td>
</tr>
</tbody>
</table>

**Campus Record Retention**

The below forms can be found on the [Procurement Forms page](#).

1. After the Fact form, if applicable
2. Supplier's Proposal or existing agreement
3. Rejected Proposals or Quotes
4. Source & Price Justification Form - Required for Federally funded purchases greater than or equal to $10,000 and Non-Federally funded purchases greater than or equal to $100,000
5. Statement of Work
6. Insurance Certificate
7. Contract of Interest
8. Internal Attachments (e.g., specifications, permits)

**Be sure to attach a Source & Price Justification form if your order is over $100,000 OR if Federal Funds are being spent!**

- IF the total purchase is over $1,000, you must create a receipt for the order to be paid due to 3-way match rules.

Once you complete the form accordingly, you can scroll up to the top of the form and select Add and go to Cart from the drop down list at the top right to proceed with your purchase. IMPORTANT: IF you need to add more lines, you can select Add to Cart then Go to write over the line description, info, and price for each line so that your previously filled out information does not get wiped out.

**Support**

- **First Line of Support**: BearBUY Help Desk
  - Available Mon. – Fri. from 8AM to 5PM, Phone: 510-664-9000 Option 1, Option 2
  - Email: BearBUYhelp@berkeley.edu
- **Regional Group Purchasing Inquiries**: [https://portal.berkeley.edu/regions](https://portal.berkeley.edu/regions)
- **Invoice Inquiries**: [https://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors](https://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors)
- **Inquiries for High Value Goods and Services over $10,000**: [https://supplychain.berkeley.edu/procurement/contact-your-buyer](https://supplychain.berkeley.edu/procurement/contact-your-buyer)