

After The Fact & Payment Request Form Specific

(Q) Are certificate of insurance required even for After the Fact Orders?

(A) Yes. A certificate of insurance is required regardless if the transaction is after the fact. A certificate of insurance should be provided when a vendor is performing services on campus. This applies to suppliers fixing servers on site, photographers, performers, etc.

(Q) I hired a tech provide to go in and fix our field office server in Salinas. I had him go in and do the work before creating a PO. Is this considered unauthorized?

(A) Yes. This is an After the Fact purchase. This is a huge risk to the University since we have not verified that the vendor has a current certificate of insurance, etc. To avoid this kind of unauthorized activity, either set up the PO beforehand with a quote from this tech provider. If this type of maintenance will be ongoing and unscheduled we would suggest setting up a blanket PO with this supplier. This ensures we have current documentation and policy requirements even though we will not know when services will be needed.

(Q) What did you mean when you say Payment Requests or After The Facts will not be sent to the supplier when you were discussing the workflow of each?

(A) Both these forms are designed to facilitate payment. The Purchase Order is not sent to the supplier via CXML, fax or email. This prevents duplicate orders being sent to the supplier. For all other forms, once processed in BearBuy the Purchase Order is sent to the supplier so the supplier can fulfill the new order.

(Q) Would the After The Fact form be used for entertainment?

(A) No. To pay for a catering invoice directly to the supplier, use the Payment Request Form. By definition, entertainment catering payments will always be after the fact. With that, the Payment Request form has been created to facilitate these payments since they should not be tracked within the After The Fact form.

Which form should I use?

(Q) Which form should I use when I need to pay a performer?

(A) If you can set up the PO before the performance takes place, please use the Service Request Form. If you are unable to set up a PO beforehand, you'll have to use the After The Fact form.

(Q) Which form should I use when I need to pay for printing fees when publishing a journal?

(A) You can use the payment request form and attach the invoice to the form. You can also pay for these expenses using a bluCard if you have access to one and if the vendor accepts payments on a credit card.

(Q) What's the best way to pay for conference registration if the vendor needs payment upfront?

(A) If the vendor accepts payments on a credit card please facilitate payment using a bluCard. If the vendor does not accept credit card payments, use the Payment Request form, attaching the conference registration form with the fees visible on the document.

(Q) Should you use the non-catalog form to set up a PO for entertainment services, (i.e. breakfast from Caterer A)?

(A) No. In this case, since you wish to set up an Entertainment PO beforehand, you should use the Service Request Form. By setting up the PO beforehand you do not need to create a Payment Request form when the invoice comes in. Instead you will pay it against the Service Order Request PO. When the invoice is being processed you still must provide a completed Entertainment Authorization form as well as the guest list.

General BearBuy Questions

(Q) Can we process a requisition when the Supplier Is Not Found?

(A) No. The shopper can submit the requisition with *Supplier Not Found* as the selected supplier. Once the requisition gets to the Requisition Creator, an actual supplier must be selected. If one is not and the transaction is approved, the system will automatically return the cart/req to the individual who first submitted the cart. The Requisition Creator must ensure an actual supplier is selected before approving the transaction in BearBuy.

20-30 Webinar Series

(Q) Where will this presentation be posted?

(A) The presentation, recording and all FAQ's will be posted on the BearBuy webpage. That URL is procurement.berkeley.edu/bearbuy.