

Cost Type	Applies to	Purchasing Method	Required Supporting Documents	Processing Time	Point of Contact	Policies
Conference Registration Fees	Registration fees for attendance at conferences, conventions or meetings of professional or learned societies	bluCard	<ol style="list-style-type: none"> 1. Approved Conference & Membership Registration Form 2. Conference Registration Confirmation Invoice <p>NOTE: Best practice, plan ahead to secure Early Bird Deadline pricing, if available</p>	1-3 weeks	Admin Team <i>Virginia Aban</i> Backup: <i>Amy Yindiphol</i> <i>Maria Martinez</i>	Policy BUS-79, Expenditures for Business Meetings, Entertainment, and Other Occasions
Catering: Contract (no facility rental involved)	Payments to vendors that require campus contract approvals	Event Card	<ol style="list-style-type: none"> 1. Approved LHS Catering Request form 2. Approved Event Planning Card Expense form 3. Participant List 4. Quote/Invoice <p>If applicable:</p> <ol style="list-style-type: none"> 5. Certificate of Insurance for services performed on campus 6. Alcohol permit for campus events 7. VCRO Pre-Approval for Exceptional Expenditure Form for morale-building events, per person over meal-limit, alcohol 	1-3 weeks	Admin Team <i>Amy Yindiphol</i>	Policy BUS-79, Expenditures for Business Meetings, Entertainment, and Other Occasions
Donations, Gifts & Contributions	Non-cash gifts of moderate expense to non-University individuals or organizations when the gifts are made on behalf of the University. Also, non-cash awards of minimal value to length of service, retirement, or gifts as an expression of sympathy.	<ol style="list-style-type: none"> 1. bluCard 2. Event Card 	<ol style="list-style-type: none"> 1. Approved bluCard or Event Card Planner Card Expense Form 2. Letter on official University letterhead which states that the donation was made on behalf of the University (<i>for donations only</i>) 3. Name, title and occupation of the gift recipient(s). 4. Quote/Invoice 	1-3 weeks	Admin Team <i>Virginia Aban</i> Backup: <i>Amy Yindiphol</i>	Policy G-42, Gifts Presented to Non-Employees on Behalf of the University

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Entertainment-Food, Other Goods, and Services	Payments to vendors who do not require contract approvals.	Event Card	<ol style="list-style-type: none"> 1. Approved Catering Request Form 2. Approved Event Planner Card Expense form 3. Participant list 4. Receipt/Invoice/Order Confirmation <p>If applicable</p> <ol style="list-style-type: none"> 5. Certificate of Insurance 6. Alcohol Permit 7. VCRO Pre-Approval for Exceptional Expenditure Form for morale-building events, per person over meal-limit, alcohol 	1-3 weeks	Admin Team Amy Yindiphol	Policy BUS-79, Expenditures for Business Meetings, Entertainment, and Other Occasions
Express Delivery Services-Account Payment	Expedited/overnight delivery services from UPS	BearBuy	Invoice	1 week	Admin Team Maria Martinez	Procurement for Express Delivery Services
Freight	Cost to transport supplies, materials, or equipment via a commercial carrier; also may include packing, crating and handling costs.	BearBuy	Invoice	1-3 weeks	Admin Team Virginia Aban	Policy D-371-28, Disbursements: Freight
Honoraria to non-university personnel (employee or student)	Payment given to an individual in recognition of a distinguished service or achievement for which propriety precludes setting a fixed price. Generally, honoraria are paid to persons of scholarly or professional standing in conjunction with an academic activity (special lecture, participation in panel discussion or workshop). NOTE: Payments are generally <u>not</u> allowable on federal funds unless a contract or grant specially authorizes such payments.	BearBuy	<ol style="list-style-type: none"> 1. Official Lawrence invitation to individual (pre-approved by The Lawrence Business Admin Office) 2. Individual's acceptance (email is acceptable) 3. Approved Lawrence Honorarium Form 4. VCRO Pre-Approval for Honoraria that exceed \$10K <p>NOTE: May require Vendor Set-up if not already in the system. Vendor setup is dependent on new supplier completing the vendoring sign up process and final approval by campus</p>	1-3 weeks	Admin Team Amy Yindiphol Backup: Maria Martinez	Policy D-371-35, Honorarium Payments
Stipend/Participant Support (not an employee or student, non-gift card)	A project-related payment made to non-UC employees or students, intended to defray costs associated with participation in a project.	BearBuy	<ol style="list-style-type: none"> 1. Approved Stipend memo from PI/PD and FA requesting participant payment 2. Spreadsheet with recipient name and a valid email address to track vendor setup. 	1-3 weeks	Admin Team Amy Yindiphol Backup Maria Martinez	Supply Chain Management: Stipends/Participant Support for Non-Employee

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Human Research Payment	Human Subjects Prepaid Card Program. Payments to individuals who are subjects in research experiments or studies For further information, see the matrix		1. Complete and submit Human Subject Fund Application and Prepaid Card Issuer Agreement 2. Completed and approved CPHS consent letter		Accounts Receivables <i>Gricelda Mendez-Zarco</i>	Controller: Billing and Payment Services human Subject Prepaid Card Program
Journals/Subscriptions*	Subscriptions to periodicals such as professional journals and magazines	bluCard if less than \$5K BearBuy ≥ \$5K or bluCard is not accepted	1. Approved bluCard Authorization form 2. Registration Form 3. Invoice/Quote 4. Dept Head Approval Required -Rena Dorph	1-3 weeks	Admin Team <i>Virginia Aban</i> Backup: <i>Amy Yindiphol</i> <i>Maria Martinez</i>	Supply Chain Management: Journals/Subscriptions
Memberships and Memberships renewals	Initiation fees or dues for memberships, usually in organizations that promote the advancement of education and research, enhance the professional standing of administrative personnel, and facilitate favorable community relations	bluCard	1. Approved Conference & Membership Registration Form 2. Invoice/Quote 3. Dept Head Approval Required- Rena Dorph	1-3 weeks	Admin Team <i>Virginia Aban</i> Backup: <i>Amy Yindiphol</i>	Policy G-43, University Membership in Organizations
Reimbursements	Reimbursements of non-travel, non-entertainment (i.e. office supplies, copies, etc.) out-of-pocket expenses when an employee cannot use other alternative procurement methods, such as bluCard	Staff Reimbursement System	1. Pre-approval memo/email from supervisor prior to making the purchase 2. Approved Lawrence Check Request form 3. Itemized paid receipts or invoices showing proof of payment	1 -2 weeks	Admin Team <i>Maria Martinez</i> Backup <i>Amy Yindiphol</i>	Policy G-28: UC Travel Regulations

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Reimbursements - Entertainment	Entertainment (refreshments, breakfast, lunch or dinner for business related event)	Staff Reimbursement System	<ol style="list-style-type: none"> Supervisor pre-approval memo/email prior to making the purchase Approved Entertainment Reimbursement form Itemized receipts showing proof of payment Participant list 	1-2 weeks	Admin Team <i>Maria Martinez</i> Backup <i>Amy Yindiphol</i>	Controller: Entertainment Policy Basics
Royalties	Payment made by licensee to a licensor for the right to make, use, or sell an invention, or payment made to an owner of a copyright for the privilege of practicing a right under the copyright	BearBuy	<ol style="list-style-type: none"> Agreement Invoice 	1-3 weeks	Admin Team <i>Virginia Aban</i> Backup: <i>Amy Yindiphol</i>	Policy G-40, University of California Patent Program
Recurring bluCard Charges	Payment made to a vendor for monthly recurring services	bluCard	<ol style="list-style-type: none"> Approved bluCard Authorization form Approval memo from PI/PD and FA, not to exceed a 12 month period Invoice 	1 week	Admin Team <i>Maria Martinez</i>	Policy BUS-43. Material Management
Gift Cards	Given to participants as incentives (non-employees) or employee recognition awards (employees) For further information, see the matrix	bluCard	<p>For Non-employee incentives</p> <ol style="list-style-type: none"> Approved bluCard Authorization form List of participants names Gift Card serial numbers if purchasint physical gift cards Invoice/Order Confirmation <p>For employee recognition</p> <ol style="list-style-type: none"> Approved Employee recognition Award form bluCard form Gift card serial numbers, purchasing physical gift cards Invoice/Order Confirmation <p>NOTE: Florencia Ramos, Executive Director, Administration Group approves all Gift Card requests</p>	1-3 weeks	Admin Team <i>Virginia Aban</i> <i>Amy Yindiphol</i> Backup: <i>Maria Martinez</i>	Policy G-42. Gifts Presented to Non- Employees on Behalf of the University

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Facility Rentals	Off campus rentals for UC Business	Event Card	<ol style="list-style-type: none"> 1. Approved Event Card Authorization Form 2. Agreement or Contract to be reviewed and forwarded to Real Estate Services 3. Final Invoice <p>(NOTE: Can take up to 4 weeks for signed contract to be returned by campus; additional time may be required if the vendor requires a UCB Certificate of Insurance)</p>	1-6 weeks	Admin Team Virginia Aban Amy Yindiphol	Procurement Policy for Conference Events
Equipment/Supplies/ Goods	Non-computer related	<ol style="list-style-type: none"> 1. BearBuy 2. bluCard 	<p>BearBuy</p> <ol style="list-style-type: none"> 1. Approved BearBuy Request form 2. Quotes or Invoice <p>bluCard</p> <ol style="list-style-type: none"> 1. Approved bluCard Authorization form 2. Quotes or Invoice 	1-3 weeks	Admin Team Virginia Aban Amy Yindiphol Maria Martinez	Policy BUS-43. Material Management
Recurring bluCard Charges	Payment made to a vendor for monthly recurring services	bluCard	<ol style="list-style-type: none"> 1. Approved bluCard Authorization form 2. Approval memo from PI/PD and FA, not to exceed a 12 month period 3. Invoice 	1 week	Admin Team Maria Martinez	Policy BUS-43. Material Management
Equipment, Sole source vendor	Specialized equipment, available from sole vendor	BearBuy	<ol style="list-style-type: none"> 1. Approved BearBuy Request form 2. Sole Source Justification Form 3. Quotes or Invoice 	1-3 weeks	Admin Team Virginia Aban	Policy BUS-43. Material Management
Equipment, Tech Orders	Laptop or Desktop equipment for staff	ITCS ticketing system	<ol style="list-style-type: none"> 1. Approved Tech Order form 2. Name and email for end user 3. Calnet ID for end user for unit imaging set up 	<p>1-6 weeks</p> <p>Request fulfillment depending on onsite inventory availability at ITCS and if new staff members have completed the onboarding process and have a Calnet</p>	Admin Team Maria Martinez IT Anna Maurer (Conducts first login with local/onsite staff once unit has been tagged and encrypted)	ITCS Hardware Catalog

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				ID	BRS IT Staff (Encrypts and conducts first login for off-site/telecommuting staff. LHS drop ships laptop to staff once unit has been tagged)	
Equipment, Maintenance & Repair	Non-computer related	BearBuy	1. Approved BearBuy Request form 2. Quotes or Invoice	1-3 weeks	Admin Team <i>Virginia Aban</i>	Policy BUS-29: Management and Control of University Equipment
Vehicle Charters- including Buses	<u>Contracted Suppliers</u> - See the UC Strategic Sourcing suppliers for charters. Make sure to check the charter service agreements for how to ensure that a vehicle will be available.	BearBuy	Should use UCB Contracted Suppliers with Master Agreement 1. Approved Vehicle Charter Form 2. Approved BearBuy Request form 3. Estimate listing date(s)/ time(s)/ location(s)/ vehicle type 4. Passenger list(s) - Indicate if transporting minors which requires a SPABE Certified driver NOTE: ONLY Campus is authorized to sign contracts	1-3 weeks	Admin Team <i>Virginia Aban</i>	Supply Chain Management: Vehicle Charters
Taxis/Limousines	Taxi or Limousine service for an individual or small group must be paid for by the individual(s) using the service	Travel Reimbursement System	1. Approved Travel Reimbursement Form 2. Receipt from service provider (Date, Name, Charge, Tip) 3. Justification Memo	1-2 weeks	Admin Team <i>Maria Martinez</i>	Procurement Policy for Taxis and Limousines
Temp Staffing	To purchase/request temporary staffing from our strategically sourced contracts, for the following categories: Admin/Clerical, IT Services, Light Industrial, or Trade. Contact Lawrence HR prior	BearBuy	1. Approved Waiver Number (Please Visit HR Website) 2. Approved BearBuy Requisition Request 3. Statement of Work 4. Time Sheets from Contracted Vendor 5. Approved Invoice	4-8 weeks	Human Resources <i>Jasmine Lopez</i>	Supply Chain Management: Temporary Staffing

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Service Agreements	To purchase personal/ professional/ independent contractor or consulting services.	BearBuy	<ol style="list-style-type: none"> 1. Approved BearBuy Requisition Form 2. Selection of Justification (if <\$10K federal funds or \$100K non-federal funds) 3. Pre-Hire Worksheet 4. Insurance Certification 5. Statement of Work 6. Vendor Contract or Agreement 7. Deposit Invoice if required at signing of agreement <p>Rush Criteria-Only label urgent orders as "urgent" if failure to act immediately might result in significant bodily harm, significant property loss or damage, violations of law or of University policies or cause significant liability to the University or to members of the University community.</p> <p>Rush Requests that meet the criteria described above require a Rush Justification Memo</p>	4-8 weeks	Admin Team Virginia Aban	BUS 43, Part 3: Purchase Transactions Supply Chain Management: Professional and Personal Services Supply Chain Management: Independent Consultants
Printing Services	When using a vendor for printing and copying services.	<ol style="list-style-type: none"> 1. BearBuy Non-Catalog Form 2. bluCard 3. UCSF Printing 	<p>BearBuy</p> <ol style="list-style-type: none"> 1. Approved BearBuy Requisition Form 2. Quote or Invoice <p>BluCard</p> <ol style="list-style-type: none"> 1. bluCard Authorization Form 2. Quote or Invoice <p>UCSF Printing Services</p> <ol style="list-style-type: none"> 1. Estimate via email 2. IOC pre-approval 	1-3 weeks	Admin Team Virginia Aban Amy Yindiphol	Supply Chain Management: Copying & Printing Services