



Museum of Vertebrate Zoology

Reimbursements

This document outlines the process for submitting reimbursement requests to campus. It was created to be used as a reference for researchers within the Museum of Vertebrate Zoology, UC Berkeley. Types of reimbursements:

1. Travel Reimbursements (direct entry) - for self if faculty, staff, postdoc, or grad student employee OR for others if you are a designated preparer in the travel system
2. Travel Reimbursements (BearBuy) - for self if grad student non-employee, and for MVZ guest and undergrads (if you are not a designated preparer in the travel system)
3. Entertainment Reimbursements (food and beverage NOT associated with travel)
4. Other Reimbursements (i.e. research supplies)

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[Travel Reimbursements \(direct entry\)](#) - for faculty, staff, postdocs, grad student employees submitting for self

Directly enter your travel information into the [Travel and Reimbursement System](#). Currently, you should only use this system for travel reimbursements. *Entertainment reimbursements (not associated with travel) should be submitted via BearBuy (see below).*

Unless you are a designated preparer, you may only enter travel reimbursement information for yourself.

- If you are **NOT** a designated preparer and need to submit a reimbursement for another individual (e.g. guests or undergrads) then submit through BearBuy (see note below)
- If you are a designated preparer and need to submit a reimbursement for another individual - use the preparer section of the direct entry system and follow the same directions

Enter Travel Information

- Be sure that you have all travel information and receipts with you before you begin
- Follow the [How-To Guide](#) giving you step by step instructions for entering your travel expenses
- Grad Student employees (e.g. GSI's) are considered "staff" – click the "Go" button to proceed
 - *If you are not sure if you are considered an employee, click "Go" - if the system allows you to enter then you are, if not, then submit via BearBuy*
- You must enter a Preferred Approver (see below)
- You must obtain signatures and upload signed report **BEFORE** you submit (see below)

Preferred Approver

- Select the appropriate Financial Analyst (FA) or Research Administrator (RA). They are the first approvers in the reimbursement process and, through the travel system, they will verify that there is funding available in the chartstring you are using.
- MVZ Funds:
 - Rhanee Guzman: for SPO managed grants (NSF, NIH, etc. issued to you or – for grad students, issued to your PI) and faculty start-up funds
 - John Stenske: for MVZ department funds (MVZ Grad Fellowship, MVZ Grad Grant, MVZ Grad Travel award, MVZ Endowment funds)
- Non-MVZ Funds:
 - If you are using funds from IB, ESPM, or other department: please ask someone from that department who you should choose.
 - To select someone from a different department, you may need to select the box next to “Select preferred approver from all departments” in order to see their name in the drop down list

Signatures

Print report, sign and obtain signatures, upload signed report.

- On the “Confirm & Submit” page, click the linked text “expense report” in the bottom box
- The traveler must sign and date this report (Traveler Signature and Date)
- The PI on the funds must also sign this report (Approver Signature and Date – to the right of traveler signature)
- Upload signed report

Submit

When everything is complete and all receipts and documentation are uploaded, including page with signatures, click “Submit to Approver”.

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Travel Reimbursements (BearBuy) - for self (if grad student non-employee), and for MVZ guests and undergrads (if you are NOT a designated preparer in the travel system)

You will complete these reimbursements in BearBuy.

Vendoring (for guests)

For guests (someone not officially affiliated with UCB), check to see if they are in the UCB system, if they are active, and if their information is current.

- Log into BearBuy (<https://bearbuy.is.berkeley.edu>) and follow these instructions to search for supplier:
https://supplychain.berkeley.edu/sites/default/files/searching_viewing_supplier_profiles_in_bearbuy_062017.pdf
- If you need to reactivate the guest, see "Reactivate a supplier":
<https://supplychain.berkeley.edu/vendoring/how>
- If the guest is not in the system, add them: see "New supplier":
<https://supplychain.berkeley.edu/vendoring/how>
 - Send Vendor form AND Conflict of Interest form to the supplier and have them return to you
 - Vendor form:
https://supplychain.berkeley.edu/sites/default/files/ucb_substitute_w-9_and_supplier_information_form_01062015.pdf
 - Conflict of Interest form:
https://supplychain.berkeley.edu/sites/default/files/conflict_of_interest_11-16-2018.docx
 - You complete section 2 of Vendor Form and make sure the field "DESCRIPTION OF BUSINESS OR SERVICE PROVIDING TO UC BERKELEY" is completed in section 1 (e.g. select "Reimbursement")
 - Fax forms together to campus vendoring as directed on vendor form
 - Best Practice: be sure to include a cover page (on clipboard above machine in front office), and request a confirmation report be printed by the front office fax machine

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- Once the information has been entered into the UC Berkeley system you will receive an email notification
- You should review the entry in BearBuy to ensure the information is correct

Submit Reimbursement Request

Complete the [Domestic or International Travel Form](#), obtain appropriate signatures, and make sure you have the signed form, all receipts, and documentation scanned to a single pdf.

- Log into [BearBuy](#)
- Within BearBuy complete a "CSS Travel and Entertainment Reimbursement" form and upload the pdf you created with all documentation to this form using the "Add Attachments" button in the "Internal Attachments" section
 - hover over the shopping cart icon at the top left of the page
 - hover over the word "shopping" in the window on the left
 - then select "view forms"
 - Under "Shared" select "Campus Shared Services"
 - Select "CSS Travel and Entertainment Reimbursement"
- At top of window, choose Available Actions: "Add and go to cart" and click "Go"
- Complete BearBuy cart (including chartstring)
 - The "CSS Travel and Entertainment Reimbursement" form should already be noted on the cart and your attachment should be included in the "Attachment" tab
- Submit

Once your order is in BearBuy you can track the status of your order. See "How to Find the Status of your Order": <https://supplychain.berkeley.edu/procurement/how-find-status-your-order>

Entertainment Reimbursements

For reimbursement of entertainment expenses (food and beverage) not associated with travel (e.g. grad student and postdoc lunch, dinner with invited speaker, event catering, etc.).

Please refer to this website for detailed instruction and access to entertainment reimbursement forms: <http://sharedservices.berkeley.edu/finance/business-and-financial-services-ticketing-system/>

Other Reimbursements (i.e. research supplies)

Please refer to this website for instruction: <http://procurement.berkeley.edu/buying/buying-services/reimbursements-employees>

Note that the "BearBuy Payment Request Form" is found after logging into BearBuy

- hover over the shopping cart icon at the top left of the page
- hover over the word "shopping" in the window on the left
- then select "view forms"
- Under "Shared" select "Organization Favorites"
- then scroll down and select "Payment Request Form"

This page gives detailed instruction for completing the "BearBuy Payment Request Form": http://baimanuals.berkeley.edu/JobAids/bearbuy/BB27_PaymentRequestForm.pdf