How to Buy CA Partial Sales Tax Exemption Orders

Important Information about CA Partial Sales Tax Exemption

Effective July 1, 2014 through July 1, 2030, the California Department of Tax and Fee Administration (CDTFA) is offering a reduced sales/use tax rate on equipment purchased for research.

To determine if a product qualifies for an exemption, please visit the Controller's Office CA Partial Sales Tax Rate Exemption webpage. It is your department's responsibility to ensure the product being purchased qualifies for partial sales tax exemption. If it is later determined that the purchase does not qualify for the sales tax exemption, your department will be responsible for the additional tax assessment, fines, and interest.

A Partial Exemption Certificate for Manufacturing, Research and Development Equipment (CDTFA-230-M) is required to be completed for every product. A signed form must be attached to your BearBuy cart.

All qualifying products must have a value of $5,000 or more and ordered on the Non-Catalog, Capital Equipment or Amount-based PO forms.

UCSF address of purchase is 1855 Folsom Street, 425 MCB, BOX 0812, San Francisco, CA 94143

UCSF's permit number is SR Z BH 19-154365

For questions regarding:
- Partial sales tax exemption and qualified uses, contact Lihua Gu in the Controller's Office at (415) 476-0804 or Lihua.Gu@ucsf.edu.
- Capital equipment and qualified property, contact Renee Boyd in the Controller's Office at (415) 502-3042 or CapitalAccounting@ucsf.edu.
- How to use BearBuy, please contact the IT Service Desk at (415) 514-4100, option 2 or appsupport@ucsf.edu. For purchasing questions, please contact Supply Chain Management at bearbuy@ucsf.edu.

Completing the Partial Exemption Certificate for Manufacturing, Research and Development Equipment

1. Open the Partial Exemption Certificate for Manufacturing, Research and Development Equipment by clicking the following link: http://supplychain.ucsf.edu/sites/supplychain.ucsf.edu/files/wysiwyg/ctdfa230m.pdf.
2. Enter the Supplier name and order/fulfillment address in the Seller/Lessor section. If you do not know the Supplier address, you can leave the address section blank.
3. Identify how the product will be used by selecting the appropriate checkbox (check only one).
4. Enter a precise description of the product being purchased. If you require additional space, please use a separate sheet and include it with your form.

5. Read and review the purchaser section. Some sections on the form are pre-populated with UCSF information. You will need to enter the following information about the authorized person in your department who will sign the form:
   - The person's name in the Printed Name of Person Signing field
   - The person's title in the Title field
   - The person's telephone number in the Telephone Number field
   - The person's email address in the Email Address of Person Signing field
   - Enter the date the document was signed in the Date field
   - Print and have the authorized person in your department sign the certificate in the Signature of Purchaser, Purchaser's Employee, or Authorized Representative field

Placing Your Qualifying Order in BearBuy

1. Navigate to the Forms section at the bottom of the BearBuy Shopping Homepage.
2. Only the Non-Catalog, Amount-based PO, or Capital Equipment forms should be used for these purchases. Determine the appropriate form to use for your purchase. Open the form and:
   a. Enter the Supplier Name.
   b. Completely fill out the form. Attach a quote/estimate and a scanned copy of the signed sales tax exemption certificate in the External Attachments section at the bottom of the form.
3. From the Available Actions drop-down menu, select Add and go to Cart, and press the Go button. You will be directed to your cart.
4. In your cart, click the Proceed to Checkout button.
5. Navigate to the General section within the Requisition ➔ Summary tabs. Click the edit button next to the section containing the CA Partial Sales Tax name. A pop up window appears.
6. Check the **CA Partial Sales Tax checkbox** and then click the **Save** button.

7. **Complete the shopping process**: Continue to add any necessary information to your cart (ship to address, Accounting Codes, notes, etc.). Once your cart is complete, place your order as you normally would. Instructions on completing a BearBuy requisition can be found on the [Supply Chain Management BearBuy Training](#) page.