



New Online Process

The Meeting and Entertainment (M&E) Payment Request Form

Overview

Training Content

- Paper CREME form vs. BearBuy Automated M&E Form
- **GETTING STARTED**
 1. Understanding BearBuy User Roles/Responsibilities
 2. How to Obtain Access to BearBuy
 3. How to Complete the Meeting & Entertainment Payment Request Form
- **ACCOUNTS PAYABLE PROCESS**

What's New & What Stays the Same

Paper CREME vs. BearBuy M&E form

Paper CREME Form

- **Paper form** sent to AP via campus mail or email
- **Manually** route for approval
- **Manually contact approver** to check on approval status and/or call AP to find out the status

New – BearBuy M&E Form

- **Electronic form** in BearBuy (works like the Payment Request form and will route to AP after approval)
- **Automated** M&E approval workflow
- **Status of form** is readily available through BearBuy
- **No host signature required** – only host name (M&E Approver to ensure event took place and for legitimate business purpose)

Stays the Same

- Exceptional approval is handled off-line
- Required information such as business purpose, number of participants, etc.
- Supporting documentation

Bear Buy Roles for Meeting & Entertainment

- **Shopper** - Create cart of items and assigns the cart to a Requester to fill out or correct any remaining information. Everyone with a MyAccess ID has Shopper access, including users who have another BearBuy role
- **Dept Access Administrator** – Designated department individual who completes a system access request to add a Requester/Meeting & Entertainment Approver
- **Requester** - Review carts assigned to them, fill out / correct any remaining information and place order (submit into workflow)
- **Meeting & Entertainment Approver NEW!!** - Designated individuals in the department who have been given authority to approve M&E expenses and have a signature card on file with Accounts Payable

Note: Existing M&E Approvers have been given BearBuy access for their respective Procurement Dept IDs. Any new M&E Approvers will need to:

- Ensure they have a signature card (U242) on file with AP.
 - Ask their Department Access Administrator to submit a request for BearBuy Access.
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- For more information on BearBuy roles, go to this page of the Supply Chain Management website: supplychain.ucsf.edu/bearbuy-roles-and-responsibilities

Obtaining BearBuy Access for Requestors & Meeting & Entertainment Approvers

Obtaining Access to BearBuy

[About MyAccess](#)

[Change Password](#)

[Change Security Questions](#)

[Sign Out](#)



Go to **My Access** and click
on **Access Management**

This task must be performed by the
System Access Administrator

	App Name	Description	SSO
★ Favorites SSO = Single Sign On	25Live Classroom Scheduling	Check classroom availability and submit scheduling requests on-line.	✓
★	Accelerate: Virtual Home for Clinical and Translational Research	The online access point for research resources and services, including training, funding, and collaboration tools. (Powered by CTSI: Accelerating Research to Improve Health). Log in to access consultations and other services.	✓
★	Access Management	Application for Access Admin and Security Admins only	✓
★	Advance	Academic Appointment and Advancement	✓
★	AP Recruit	Manage the UCSF academic recruitment process	✓

How to Complete the New M&E Payment Request form in BearBuy

Using BearBuy Meeting & Entertainment Form

The screenshot displays the UCSF BearBuy website interface. At the top, the user is identified as HELEN SZETO, with 764 Action Items and 0.00 USD in the cart. The navigation bar includes links for Shop, Shopping, Dashboard, Shopping Home, and Home/Shop. A search bar is set to 'Everything' with a 'Go' button. Below the search bar, there are links for 'Go to: advanced search | favorites | quick order' and 'Browse: suppliers | categories | contracts | chemicals'. The main content area is divided into sections: 'Welcome to UCSF BearBuy', 'Lab Supplies/Research', 'Campus Related Services', 'Meeting and Entertainment (Special Approval Required)', and 'Frequently Used Forms'. In the 'Campus Related Services' section, there are three tiles: 'CLS DISTRIBUTION & STORAGE', 'HOFFITT CATERING', and 'Surplus Form'. In the 'Meeting and Entertainment (Special Approval Required)' section, there are two tiles: 'AMERICA TO GO' and 'Meeting and Entertainment Payment...'. The 'Meeting and Entertainment Payment...' tile is highlighted with a red border. A blue callout box with a white background and a blue border points to this tile, containing the text: 'Forms From the landing page, scroll down and click on M&E Form'.

M&E Payment Request Form Instructions

- A Requisition and PO will be created for internal process purposes only. The Purchase Order will NOT be sent to the supplier. **The Meeting and Entertainment Payment Request Form CANNOT be used with a pre-existing BearBuy PO.**
- **Do NOT include any confidential information in the form.** (e.g. SSN, credit card numbers, etc.)
- One individual billing per Meeting & Entertainment Payment Request Form (i.e., one individual catering invoice per one Meeting & Entertainment Payment Request Form). If there are multiple vendors, create multiple forms.
- Supporting documentation *must* be attached to form.
- Meeting & Entertainment Payment Request Forms must be submitted by the Requester. If the form is completed by users in other roles, the cart must be forwarded to the Requester to submit the form.
- Meeting and Entertainment Approval is required on **every** Meeting & Entertainment Payment Request Form, regardless of dollar amount. Approvers **cannot** approve a form they created themselves.
- Best practice is to mail checks directly to the payee. MCB pick-up should be used on an exceptional basis.

What Supporting Documentation is Required?

- Copy of Catering Invoice, showing itemized charges separately such as food, beverage, tip, tax, delivery charges, etc.
- Certificate of Insurance naming the Campus as additionally Insured.
- If the order requires exceptional approval, a copy of the paper CREME form signed by the Exceptional Approver.
- Participant List (if longer than 25 names)
- **Do NOT include any private & confidential information in the attachments**

BearBuy Meeting and Entertainment Payment Request Form

Supplier / Vendor

Begin entering the vendor name, then select the name from the drop-down box.

Payment Information

Enter Supplier

Payee (If different from supplier name)

Commodity Code

Request Handling

Attachment to Check Required

Hold Check for Pick-Up

Payment Message

- JAMES A HILL INSTRUMENT SERVICES
- JAMES BOWMAN ASSOCIATES, INC
- JAMES BRENT CLINE ARCHITECT
- JAMES IV ASSOC OF SURGEONS, INC. 
- JAMES STANDFIELD CATERING
- ADAMS, JAMES 
- ANDERSON, JAMES 

[Click here to view more supplier results](#)

Some suppliers have a **stop sign** next to the name. For the purposes of this form, you can ignore this sign and select the appropriate vendor to pay.

BearBuy M&E Payment Request Form (cont'd)

After you select the vendor, the address will populate.
NOTE: If you do not see the correct remit address, contact Vendors@ucsf.edu to add.

Payment Information	
Supplier	JAMES STANDFIELD CATERING more info... select different supplier
Fulfillment Address	A/P, Dispatch: EML: (preferred) 425 LITTLEFIELD AVENUE SOUTH SAN FRANCISCO, CA 94080 US
Distribution	The system will distribute purchase orders using the method(s) indicated below: Email (HTML Body) sales@jamesstandfieldcatering.com Manual Payee (If different from supplier name) <input type="text"/>
Commodity Code	00005
Request Handling	
Attachment to Check Required	<input type="text" value="Yes"/>
Hold Check for Pick-Up	<input type="text" value="No"/>
Payment Message (70 char. max)	06-22-13 Event for recruits at HAAS School of Business
Remit To Address	
Remit To Location List	<input type="text" value="425 LITTLEFIELD AVENUE, SOUTH SAN FRANCISCO"/> 425 LITTLEFIELD AVENUE SOUTH SAN FRANCISCO, CA 94080

New Supplier?

If you cannot find the supplier, or if the payment is to a new supplier, email Vendors@ucsf.edu to request the vendor to be set up. The new supplier must be set up *before* the Meeting & Entertainment Payment Request Form can be completed.

If the **Payee name** is different from the **Supplier Name**, e.g., alternate name or DBA, enter it here.

BearBuy M&E Payment Request Form (cont'd)

Payment Information	
Supplier	JAMES STANDFIELD CATERING more info... select different supplier
Fulfillment Address	A/P, Dispatch: EML: (preferred) 425 LITTLEFIELD AVENUE SOUTH SAN FRANCISCO, CA 94080 US
Distribution	The system will distribute purchase orders using the method(s) indicated below: Email (HTML Body) sales@jamesstandfieldcatering.com Manual
Payee (if different from supplier name)	<input type="text"/>
Commodity Code	00005
Request Handling	
Attachment to Check Required	Yes <input type="button" value="v"/>
Hold Check for Pick-Up	No <input type="button" value="v"/>
Payment Message (70 char max)	06-22-13 Event for recruits at HAAS School of Business
Remit To Address	Remit To Location List 425 LITTLEFIELD AVENUE, SOUTH SAN FRANCISCO <input type="button" value="v"/> 425 LITTLEFIELD AVENUE SOUTH SAN FRANCISCO, CA 94080

Check Attachments

Select "Yes" if there is a required attachment to the check (e.g., registration form).

The **Commodity Code** is not used on this form. It is defaulted to 00005.

Hold Check for Pick-Up

Use only for exceptional circumstances. Select "Yes", if necessary, to pick-up check at MCB.

Payment Message

Enter a message you would like printed on the remittance advice. If the check is held for MCB pick-up, enter name and phone number of the person to be called when the check is ready.

BearBuy M&E Payment Request Form (cont'd)

Type of Payment

Select "Advanced Payment (Deposit), Regular or Final Payment".

Event Details

Type of Payment

Type of Expense (Check all that apply)

<input type="checkbox"/>	Breakfast	<input checked="" type="checkbox"/>	Lunch	<input type="checkbox"/>	Dinner	<input type="checkbox"/>	Light Refreshments	<input type="checkbox"/>	Buffet Reception	<input type="checkbox"/>	Other Meeting Expenses
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Business Purpose

Provide the description and business purpose if you selected Other Events and Expenditures above.

250 characters remaining expand | clear

If charged to federal fund, is this A-21 allowable?

Type of Expense:
Check all that apply.

Business Purpose

If "Other" is chosen, provide detailed description in box.

A-21 Allowable: Yes or No

Defines if the cost is directly attributable to a Federal Funding Source.

BearBuy M&E Payment Request Form (cont'd)

Event Date (s) **Number of Participants**

Event Date(s)
Number of Participants

Names(s) of official guests, prospective appointee, society, organization, or student group (If there are more than 25 participants, please attach a listing of participant names).

The Skipper
Gilligan
Mary Ann Summers
Ginger Grant
The Professor
Thurston Howell III
Lovey Howell

491 characters remaining expand | clear

Enter the name of the host. If there is not a host, enter N/A. **Name of Host**

Amount **Amount**

Attachments

Please attach a scanned copy of all supporting documentation including an exceptional approver signature if needed.

Internal Attachments

add attachment..

List of Participants (Required for events and meetings with meals, light refreshments and related services)

If there are *more* than 25 participants, please attach a listing of participant names & title of participants. If impractical to list each guest based on the open nature of the event, list of attendee is not needed.

Exceptional approval is required if attendees are spouse, domestic partner, other partner or family member.

Attachments

Please attach scanned copies of *all* supporting documentation.

Never include Sensitive Information on any support file, e.g., Social Security Numbers, Bank Accounts, etc.

BearBuy M&E Payment Request Form (cont'd)

Available Actions: Add and go to Cart Go Close

Payment Information

JAMES STANDFIELD CATERING [more info...](#)
select different supplier

A/P, Dispatch: EML: (preferred)
425 LITTLEFIELD AVENUE
SOUTH SAN FRANCISCO, CA 94080 US

Complete Request
When you have completed the form, select "Add and go to Cart" and click "Go".

Your request is now in your **Shopping Cart**.

Checkout Later?
If you choose to complete Checkout at a later time, you can access your **Active Shopping Cart** here.

Shop Alt + P

Shopping

My Carts and Orders

- Open My Active Shopping Cart
- View Draft Shopping Carts
- View My Orders (Last 90 Days)

BearBuy M&E Payment Request Form (cont'd)



AP QA AP_Test ★ Action Items 289 Notifications 🛒 1,200.35 USD 🔍

Shop / My Carts and Orders / Open My Active Shopping Cart ▾ / Cart - Draft Requisition

Shopping Cart for AP QA AP_Test

Name this cart: 2011-08-02 AP QA_AP 01

Continue Shopping

1 Item(s) for a total of **1,200.35 USD**

Proceed to Checkout
Click button to continue the completion process.

Proceed to Checkout

or **Assign Cart**

Have you made changes?

| **Help** | | Perform an action on (0 items selected)... ▾ | Select All

JAMES STANDFIELD CATERING [more info...](#)

Product Description	Unit Price	Quantity	Total
Meeting & Entertainment Payment Request Form open form... Attachment to Check Required Yes Hold Check for Pick-Up No Payment Message (70 char. max) 06-22-13 Event for recruits at HAAS School of Business Type of Payment Regular Payment Commodity Code 00005 - Administrative Services-434290 Taxable <input type="checkbox"/> Capital Expense <input type="checkbox"/>	1,200.35 USD	1	1,200.35 USD

Taxable? Check box if this expense is **taxable**. A meeting or entertainment expense will never be a **capital expense**.

BearBuy M&E Payment Request Form (cont'd)

Requester AP | Action Items 2 | Notifications 9 | 25.00 USD

Shop | My Carts and Orders | Open My Active Shopping Cart | Accounting Codes - Draft Requisition

Procurement Department | Optional Approval | General | Shipping And Purchase Order | **Accounting Codes** | Internal Notes and Attachments | External Notes and Attachments | Billing | Final Review

Place Order or Assign Cart

Return to shopping cart | Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Business Unit
- Required field: Speed Type

Requisition | PR Approvals | PO Line Preview | Comments | Attachments (1) | History

Summary | Shipping And Purchase Order | **Accounting Codes** | Billing | Miscellaneous Information | Asset Management | Supplier Info

Accounting Codes

These values apply to all lines unless specified by line item

Account	Speed Type	Fund	Department ID	Project	Activity Period	Function	Flexfield	Business Unit	CPFM Ref#1	CPFM Ref#2
no value	no value Required field	no value	no value	no value	no value	no value	no value	no value Required field	no value	no value

edit

For selected line items | Add To Favorites | Go

VWR International more info...

Product Description	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Payment Request Test Accounting Code (same as header)		25.00	1	25.00 USD
Supplier subtotal				25.00USD
Subtotal				25.00 18
Total				25.00 USD

Accounting Codes / Chartfields

Enter a **SpeedType** to populate the Accounting Codes fields. If not using a SpeedType, all required chartfields will need to be entered manually. Although not required, the **Account** field should be completed; not doing so could delay payment. Code fields are **not** required in some circumstances (e.g., when charging payment to a balance sheet account) Click "Save" when finished.

BearBuy M&E Payment Request Form (cont'd)

Final Review
 After you have successfully populated the chartfields, click on **Final Review**

Requester AP | Action Items 2 | Notifications 9 | 25.00 USD

Shop | My Carts and Orders | Open My Active Shopping Cart | Accounting Codes - Draft Requisition

Procurement Department
 Optional Approval
 General
 Shipping And Purchase Order
 Accounting Codes
 Internal Notes and Attachments
 External Notes and Attachments
 Billing
 Final Review

Place Order or Assign Cart

You have completed the required information in this step. At this point, you can do the following:
 Proceed to the next step: **Internal Notes and Attachments**. Go straight to the end: **Final Review**.

Requisition | PR Approvals | PO Line Preview | Comments | Attachments (1) | History

Summary | Shipping And Purchase Order | **Accounting Codes** | Billing | Miscellaneous Information | Asset Management | Supplier Info

Hide value descriptions

Accounting Codes ?

These values apply to all lines unless specified by line item

Account	Speed Type	Fund	Department ID	Project	Activity Period	Function	Flexfield	Business Unit	CPFM Ref#1	CPFM Ref#2	edit
<i>no value</i>	GERTRUDE COA Team test #63	5150 Other Sources Other [Bud]	147101 M_Rad- Abdominal Imaging	1111111 General Unspecifc	<i>no value</i>	43 Academic support	RADDP X-Ray Duplication	SFCMP Univ of California CAMPUS	<i>no value</i>	<i>no value</i>	

VWR International [more info...](#)

For selected line items

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
1 Payment Request Test more info... Accounting Code (same as header)			25.00	1	25.00 USD	<input type="checkbox"/>
Supplier subtotal					25.00USD	
Subtotal					25.00	19
Total					25.00 USD	

BearBuy M&E Payment Request Form

Correct Errors

Check for Warning Message and correct any error(s)

AP QA AP_Test



Action Items 289

Notifications



1,200.35 USD



Shop / My Carts and Orders / Open My Active Shopping Cart / Summary - Draft Requisition

<input checked="" type="checkbox"/> Procurement Department	<input checked="" type="checkbox"/> Optional Approval	<input checked="" type="checkbox"/> General	<input checked="" type="checkbox"/> Shipping And Purchase Order	<input checked="" type="checkbox"/> Accounting Codes	<input checked="" type="checkbox"/> Internal Notes and Attachments	<input checked="" type="checkbox"/> External Notes and Attachments	<input checked="" type="checkbox"/> Billing	<input checked="" type="checkbox"/> Final Review	Assign Cart
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[Return to shopping cart](#) [Continue Shopping](#)

⚠ Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Advance Payment (Line 1)
- The form "Meeting & Entertainment Payment Request Form" is incomplete or has errors. Open the form and correct the errors.

Requisition PR Approvals PO Line Preview Comments (1) Attachments History

Summary Shipping And Purchase Order Accounting Codes Billing Miscellaneous Information Asset Management Supplier Info

Correct the error(s) and "Save"

Edit Line		Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price																																
1		Meeting & Entertainment Payment Request Form			1,200.35	1	1,200.35 USD																																
<p>⚠ The form is incomplete or has errors. Open the form and correct the errors.</p> <table border="1"> <tr> <td>Attachment to Check Required</td> <td>Yes</td> <td>Advance Payment</td> <td> <input type="text" value="Yes"/> <p>⚠ Required field</p> </td> <td>Internal Note</td> <td colspan="3"> <input type="text"/> <p>expand clear</p> </td> </tr> <tr> <td>Hold Check for Pick-Up</td> <td>No</td> <td>Taxable</td> <td><input checked="" type="checkbox"/></td> <td>External Note</td> <td colspan="3"> <input type="text"/> <p>expand clear</p> </td> </tr> <tr> <td>Payment Message (70 char. max)</td> <td>06-22-13 Event for recruits at HAAS School of Business</td> <td>Capital Expense</td> <td><input type="checkbox"/></td> <td>Commodity Code</td> <td colspan="3"> <input type="text" value="00005 - Administrative Services-434290"/> </td> </tr> <tr> <td>Type of Payment</td> <td>Regular Payment</td> <td></td> <td></td> <td></td> <td colspan="3"></td> </tr> </table>								Attachment to Check Required	Yes	Advance Payment	<input type="text" value="Yes"/> <p>⚠ Required field</p>	Internal Note	<input type="text"/> <p>expand clear</p>			Hold Check for Pick-Up	No	Taxable	<input checked="" type="checkbox"/>	External Note	<input type="text"/> <p>expand clear</p>			Payment Message (70 char. max)	06-22-13 Event for recruits at HAAS School of Business	Capital Expense	<input type="checkbox"/>	Commodity Code	<input type="text" value="00005 - Administrative Services-434290"/>			Type of Payment	Regular Payment						
Attachment to Check Required	Yes	Advance Payment	<input type="text" value="Yes"/> <p>⚠ Required field</p>	Internal Note	<input type="text"/> <p>expand clear</p>																																		
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Payment Message (70 char. max)	06-22-13 Event for recruits at HAAS School of Business	Capital Expense	<input type="checkbox"/>	Commodity Code	<input type="text" value="00005 - Administrative Services-434290"/>																																		
Type of Payment	Regular Payment																																						
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>																																					

Subtotal 1,200.35
Total 1,200.35 USD

BearBuy M&E Payment Request Form (cont'd)

Place Order

When you have completed all required fields, click "Place Order".

Shop / My Carts and Orders / Open My Active Shopping Cart ▾ / Summary - Draft Requisition

✓ Procurement Department	✓ Optional Approval	✓ General	✓ Shipping And Purchase Order	✓ Accounting Codes	✓ Internal Notes and Attachments	✓ External Notes and Attachments	✓ Billing	✓ Final Review	Place Order or Assign Cart
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[Return to shopping cart](#) [Continue Shopping](#)

✓ **All done! The required information has been completed and this request is ready to be submitted.**

Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition | PR Approvals | PO Line Preview | Comments | Attachments (2) | History

Summary | Shipping And Purchase Order | Accounting Codes | Billing | Miscellaneous Information | Asset Management | Supplier Info

Hide header Hide value descriptions

Procurement Department	Optional Approval
Procurement Dept <input type="button" value="edit"/>	Requisition Pre-Approver <input type="button" value="edit"/> Ad Hoc Approver 1 <input type="button" value="edit"/> Ad Hoc Approver 2 <input type="button" value="edit"/>

BearBuy M&E Payment Request Form (cont'd)

Requisition Information



Congratulations! You have successfully submitted your request. If you need to view or print a copy, click [Quick View](#) or view its status on the [Approvals Tab](#).

Approval Status

Click here to see the approval status of the requisition

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

Requisition number	1031296 view
Requisition status	Pending
Cart name	2013-09-11 Requester_AP 03
Requisition date	9/11/2013
Requisition total	1,200.35 USD
Number of line items	1

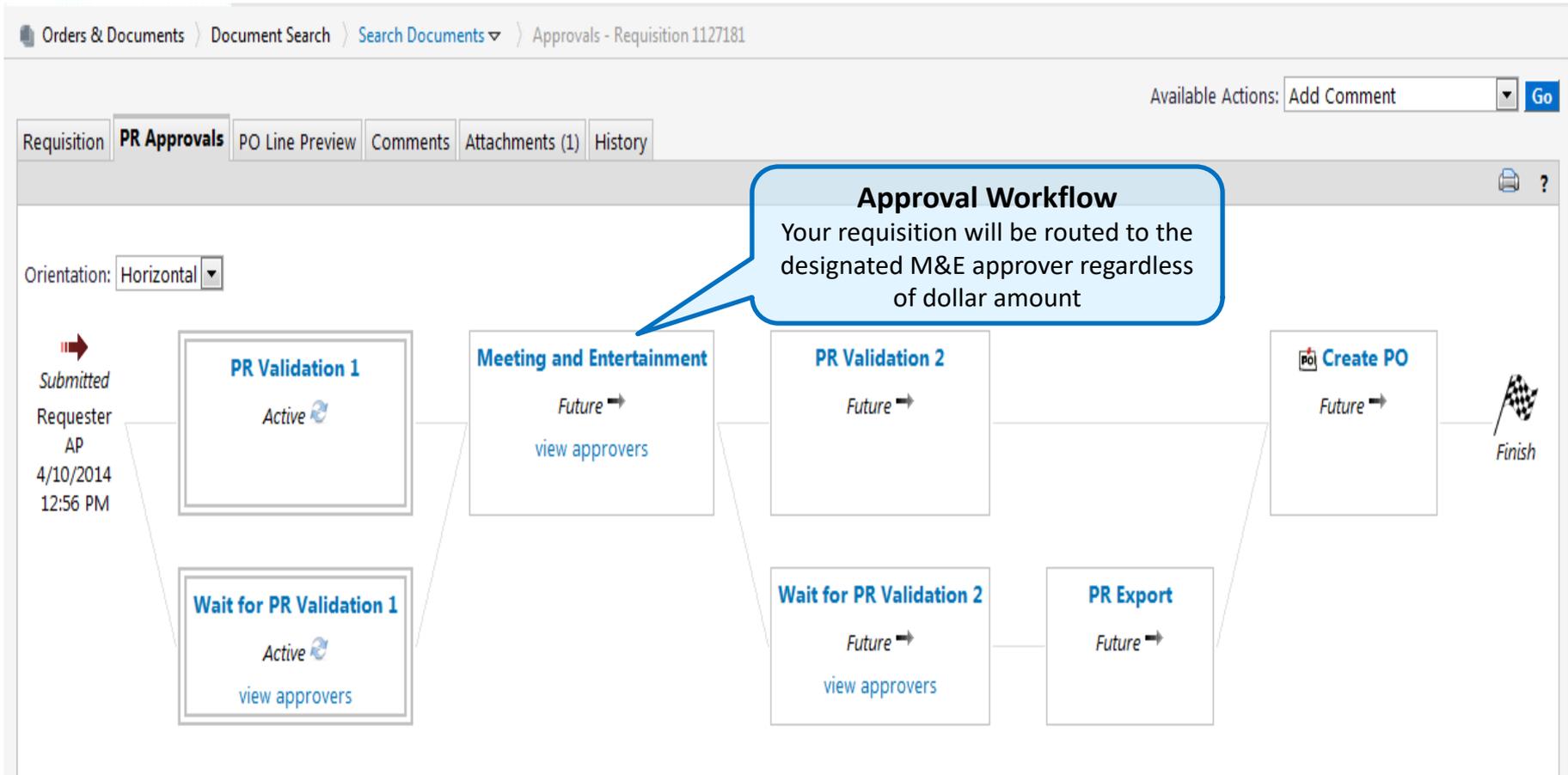
Completion / Requisition Info

Your form has been submitted for approval. This is your Requisition No.

What would you like to do next? Here are links to some common actions.

- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

BearBuy M&E Payment Request Form (cont'd)



Accounts Payable Process

- All Meeting/Entertainment forms will be reviewed by AP for policy compliance prior to payment.
- SLA – process within 10 business days (provided information is complete and accurate, and vendor is already set up).
- Payment issued upon vendor payment terms (usually Net 30 or discounted payment term) or upon request for an earlier payment.
- Payment sent directly to vendor (Note: MCB pickup should be on an exceptional basis).
- For help or questions, contact the Accounts Payable Helpdesk at (415) 514-4100 or SCMAP@ucsf.edu.