

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.

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:
 - a. The person's **name** in the **Printed Name of Person Signing** field
 - b. The person's **title** in the **Title** field
 - c. The person's **telephone number** in the **Telephone Number** field
 - d. The person's **email address** in the **Email Address of Person Signing** field
 - e. Enter the **date** the document was signed in the **Date** field
 - f. **Print** and have the authorized person in your department **sign** the certificate in the **Signature of Purchaser, Purchaser's Employee, or Authorized Representative** field

NAME OF PURCHASER University of California, San Francisco	SIGNATURE OF PURCHASER, PURCHASER'S EMPLOYEE, OR AUTHORIZED REPRESENTATIVE F
PRINTED NAME OF PERSON SIGNING XXXXXX A	TITLE XXXXXX B
ADDRESS OF PURCHASER 1855 Folsom Street, 425 MCB, Box 0812, San Francisco, CA 94143	TELEPHONE NUMBER (415) XXX-XXXX C
PERMIT NUMBER (if you are not required to hold a permit, explain why) SR Z BH 19-154365	DATE XX/XX/20XX E
EMAIL ADDRESS OF PERSON SIGNING XXXXX@UCSF.EDU D	

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.

Available Actions: Add and go to Cart Go Close
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.

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.


SELLER'S/LESSOR'S NAME
SELLER'S/LESSOR'S ADDRESS (street, city, state, zip code)
3. Identify how the product will be used by selecting the appropriate checkbox (**check only one**).

Is qualified tangible personal property and will be used by me primarily (please check one):

 1. for manufacturing, processing, refining, fabricating, or recycling;
 2. for research and development;
 3. to maintain, repair, measure, or test any property being used for (1) or (2) above; or
 4. as a special purpose building and/or foundation.
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.

Description of qualified tangible personal property purchased or leased ¹
Electrophysiology experimental mechanical rig. Includes SliceScope motorised microscope, 2 motorised 4 axis, super smooth PatchStar manipulators with steep brackets, Motorised Movable Bottom Plate (MMBP) with 3 English threaded mounting cartridges and short post & platform for mounting sample.

6. Check the **CA Partial Sales Tax** checkbox and then click the **Save** button.



The screenshot shows a 'Buyer Info' form with fields for Buyer Name, Buyer Email, and Buyer Phone. A 'CA Partial Sales Tax' checkbox is checked and highlighted with a red box. A red arrow points from this checkbox to a separate box containing 'CA Partial Sales Tax' with a green checkmark. The 'Save' button is also highlighted with a red box. Below the form, there is a 'Select from all values...' dropdown and a 'recalculate / validate values' link.

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.