

## Important Information About the CA Partial Sales & Use 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: <https://www.cdtfa.ca.gov/industry/manufacturing-exemptions.htm>

To determine if a product qualifies for an exemption, please visit the [Controller's Office California Partial Sales & Use Tax 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 completed [Partial Exemption Certificate for Manufacturing, Research and Development Equipment \(CDTFA-230-M\)](#) is required 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 be ordered on the **Capital Equipment, Non-Catalog, or Amount-based PO form** in BearBuy.
- For questions regarding:
  - Partial sales tax exemption and qualified uses, contact UCSF Controller's General Accounting: [genacctgsvcdesk@ucsf.edu](mailto:genacctgsvcdesk@ucsf.edu).
  - Capital equipment and qualified property, contact UCSF Controller's Capital Accounting at [capitalaccounting@ucsf.edu](mailto:capitalaccounting@ucsf.edu).
  - How to shop using BearBuy, contact the IT Service Desk at (415) 514-4100, option 2 or [appsupport@ucsf.edu](mailto:appsupport@ucsf.edu).

## Completing the Partial Exemption Certificate

1. Click the link below to open UCSF's **Partial Exemption Certificate for Manufacturing, Research and Development Equipment**: <http://supplychain.ucsf.edu/sites/supplychain.ucsf.edu/files/wysiwyg/cdtfa230m.pdf>.

2. Enter the **supplier's name** and **address** in the **Seller/Lessor** section. If you don't know the address, you can leave the address field blank.

SELLER'S/LESSOR'S NAME
SELLER'S/LESSOR'S ADDRESS (street, city, state, zip code)

3. Identify how the product will be used and select the appropriate checkbox (*check only one*).

is qualified tangible personal property and will be used by me primarily ( <i>please check one</i> ):	
1. <input type="checkbox"/>	for manufacturing, processing, refining, fabricating, or recycling;
2. <input checked="" type="checkbox"/>	for research and development;
3. <input type="checkbox"/>	to maintain, repair, measure, or test any property being used for (1) or (2) above; or
4. <input type="checkbox"/>	as a special purpose building and/or foundation.

4. Enter a precise description of the product being purchased. If you require additional space, use a separate sheet and include it with your form.

Description of qualified tangible personal property purchased or leased <sup>1</sup>
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 carriages and short post & platform for mounting sample.

5. Some fields are pre-populated with UCSF information such as the *Name of Purchaser, Address of Purchaser, or Permit Number on the certificate*. There is no need to change this information.

NAME OF PURCHASER University of Calif. San Francisco, Regents of the University of Calif.	SIGNATURE OF PURCHASER, PURCHASER'S EMPLOYEE, OR AUTHORIZED REPRESENTATIVE
PRINTED NAME OF PERSON SIGNING	TITLE
ADDRESS OF PURCHASER 1855 Folsom Street, 425 MCB, Box 0812, San Francisco, CA 94143	
PERMIT NUMBER (if you are not required to hold a permit, explain why) SR Z BH 19-154365	TELEPHONE NUMBER ( )
EMAIL ADDRESS OF PERSON SIGNING	DATE

6. Enter the following information about the authorized person in your department who will sign the form: **PRINTED NAME OF PERSON SIGNING, TITLE, TELEPHONE NUMBER, and EMAIL ADDRESS OF PERSON SIGNING.**
7. Print the certificate, and then have the authorized person in your department sign the certificate in the **SIGNATURE OF PURCHASER, PURCHASER'S EMPLOYEE, OR AUTHORIZED REPRESENTATIVE** field and enter the date they signed the certificate in the **DATE** field.

## Placing Your Qualifying Order in BearBuy

1. Open BearBuy, which is accessible through MyAccess.
2. Scroll to the bottom of the BearBuy shopping homepage where you will find the order forms.
3. Only the **Capital Equipment, Non-Catalog, or Amount-based PO form** should be used for these purchases. Determine the appropriate form for your purchase. Open the form and:
  - a) Enter the **Supplier Name**.
  - b) Completely fill out the form.
  - c) Attach a **quote/estimate** and a scanned copy of the signed **partial tax exemption certificate** in the **External Attachments** section at the bottom of the form.
  - d) From the **Available Actions** menu at the top of the form, select **Add and go to Cart**, and press the **Go** button. You will be directed to your cart.

Available Actions:

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 checkbox. A pop-up window appears.

The screenshot shows the 'General' section of a requisition summary. A red box highlights the 'CA Partial Sales Tax' checkbox, which is currently checked. A red arrow points to the 'edit' button next to this section.

6. In the pop-up window, check the **CA Partial Sales Tax checkbox**, and then click the **Save** button.

The screenshot shows the 'Buyer Info' pop-up window. A red circle highlights the 'CA Partial Sales Tax' checkbox, which is checked. The 'Save' button is visible at the bottom.



The screenshot shows the 'General' section of a requisition summary. A red circle highlights the 'CA Partial Sales Tax' checkbox, which is checked. The 'edit' button is visible next to this section.

7. **Complete the shopping process:** Continue to add any necessary information to your cart (Shipping 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](#) webpage.