Event Checklist:

☐ Communicate in a **timely manner** with event lead(s) and Anesthesia Finance Office (AFO)
  - Timely manner: varies on event; please allow time for communication, review and approval of several units (AFO, SOM Dean’s Office, Supply Chain Management (SCM), Accounts Payable and vendor)
  - Event lead(s): event lead(s) depend on the unit and event, *i.e.* Education Domain, Event: Laryngoscope Graduation – leads: K. Sullivan & S. Smith

☐ Create Business Justification
  - The business justification should include the business purpose of the non-UCSF guests (personal guests) and/or the reason for the exceptional nature of the event

☐ Guest List (full names with affiliation)

☐ Obtain Vendor Contract
  - If using a new vendor, provide the vendor with the W9 & Supplier Information Form (SIF) to complete. Submit the completed form to Vendor Relations at vendors@ucsf.edu. Allow 1-2 business for the vendor to be set-up in BearBuy
  - SCM may send an amendment to the vendor’s contract to comply with UCSF risk management and applicable UC policies

☐ Enter request in BearBuy (review Events Workflow sheet to determine if this step is applicable)
  - If the request requires exceptional approval, include in the Ad Hoc Approver fields: Ad Hoc Approver 1 – Simon Schuster
  - Include business justification memo and other supporting documents with your BearBuy request as an attachment

☐ Submit Supplemental Form for Meeting & Entertainment/Exceptional Expense Approval (after PO issued) for deposit and any additional payments – note the BearBuy requisition number and PO number on the form
  - If exceptional approval was already approved in BearBuy for the total amount expected, the Supplemental Exceptional Approval Form does not need to go through the Dean’s Office again; the form can be submitted directly to AFO

- Refer to the following policies and/or guidelines:

  Advance Payment/Prepayment policy, 300-41
  *This policy covers when it is appropriate to make advance payments to vendors and the proper documentation needed in order to protect the financial interests of UCSF*

  Expenditures for Business Meetings, Entertainment, & Other Occasions, BUS-79
  *This policy guides the University to comply with IRS regulations regarding the provision or reimbursement of business meals and entertainment*

  SOM Exceptional Expenses Overview; located under Brown Bags tab and in the presentation section
  *This training document was created and updated by the School of Medicine Dean’s Office, October 15th, 2017, to assist departments in understanding various requirements and regulations around exceptional expenses*