

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