

Processing Meeting & Entertainment Transactions for Events

1. Obtain a contract from the venue/vendor
2. Submit the contract in BearBuy using the Facility Rental Form to create a requisition
3. The BearBuy requisition will go through Requester, Department Approver, and Supply Chain Management (SCM)
4. Once the requisition is approved by SCM Department Buyer, a PO will be created. The preparer is responsible to follow up on the status of the PO via BearBuy or Anesthesia Finance Office (AFO)
5. If a deposit needs to be paid, submit Supplemental Exceptional Approval Form to AFO; note the BearBuy requisition number and PO on the form when submitting to AFO
6. If personal guests are expected to be in attendance, exceptional approval is required by the School of Medicine (SOM) Dean's Office; a business purpose/justification needs to be provided for approval. In Bear Buy, include Simon Schuster as the Ad-Hoc approver
7. The business purpose included with the Supplemental Exceptional Approval Form should be the same as the one used in BearBuy; also, the same purpose should be used for the final payment and/or any associated payments and/or reimbursements
8. Preparer is responsible with following up on the status of payments by contacting Accounts Payable (415-502-3331) or check MyReports (if granted access)
9. Please refer to the Events Workflow sheet to help guide you

Important notes:

Per-person limit:

Meal	Maximum allow per-person
Breakfast	\$27.00
Lunch	\$47.00
Dinner	\$81.00
Light refreshment	\$19.00

- The maximum allowed per-person; meal rates include labor, sales tax, delivery charges, and other services fees
- Cost of room rental, room setup fees, media rental, decorations, etc. are not included in the per-person limit unless the vendor cannot separate those costs
- Individual events may have pre-approved budgets which may be less than the maximum allowed per person limits (i.e. ACGME budget); for more information, please contact Patricia Bustos at Patricia.Bustos@ucsf.edu
- The Dean's Office must approve additional exceptional expenditures
- If there are groceries/meals/alcohol purchased for the same event, the costs must be combined with the all other expenses for the same event.
- If personal guests are expected to be in attendance, exceptional approval is required by the Dean's Office; a business purpose/justification needs to be provided for approval
- Requisition should be submitted as far in advance as possible as turnaround times can vary; requests may go through some or all of the following: Department Approver, Dean's Office (for Exceptional Approval), SCM, Accounts Payable, and vendor
- Attendee list must be provided with affiliation; spouse/partner must serve as a bona fide University business purpose; must provide explanation of spouse's role or contribution to the event
- Admin is responsible for breakdown the expenses (cost of food, services, setup fee, delivery, etc.)
- Policies/Resources: BUS-79 and SOM Exceptional Expense Overview