

## BRC Request for Acquisition of Goods or Services Form Instructions

Use a separate sheet for each **Vendor/Payee**. Vendor/Payees means a company, supplier or individual who is **not** a UC employee. If the vendor/payee is a UC Employee contact Payroll for assistance. If this request is for a One Time Payee, please complete BRC One Time Payee form. Missing or incomplete information could delay your request.

**Vendor/Payee:** Please note that payment will be mailed to the address on the invoice attached to your form. You do not need to include an address in this field.

**Dept. Code (Department Code):** – The 4 digit code that identifies your department or unit. The Dept. Code is required to ensure appropriate charges to your account.

**PO# (Purchase Order):** For BRC use only.

**FAU# (Full Accounting Unit):** The account/fund/project/sub/object/source/ to be charged. If the account is to be split to more than 2 FAUs, please add an additional sheet with the FAU and percentages (must equal 100%). Departments are encouraged to use the optional Project Code for tracking and monitoring expenditures; please contact your BRC team leader for assistance in the use of project codes. Object codes will be input by the BRC.

**Business Justification:** This field applies to all categories. Please briefly describe the reason/justification for the expense.

### **Categories:**

**Conference and Event:** (includes Business Entertainment) – Vendor Payment Request Only

- ✓ **Host Name and Host Signature:** the Host is the person who invites attendees and organizes the events.
- ✓ **Description:** provide a detailed description of the event. Do not use acronyms or abbreviations; attach an additional sheet if necessary. For example: “Hosted meeting for the UC Senate Faculty Welfare Committee on January 15, 2009 to discuss faculty health insurance plan design for 2010 plan year.”
- ✓ **Alcohol Served:** check the box if alcohol was served. Note that the purchase of alcohol may not be permissible under certain fund sources. If the purchase includes alcohol, please verify that the fund source permits alcohol to be purchased.
- ✓ **Required attachments:**
  - **Attendees list:** list each person who attended, including his or her title and affiliation.
  - **Agenda:** a program for the event, including dates and times.
  - **Original Invoices:** Invoices should be itemized and must be originals (no copies).

### **Supply/Equipment Orders:**

- ✓ **Complete Description of Items:** Include color, size, etc.
- ✓ **Catalog #:** catalog or part number
- ✓ **Pg#:** catalog page number (helpful if your item must be researched).
- ✓ **Qty/UOM:** Enter Quantity (Qty) and Unit of Measure (UOM) (each, dozen, pack, box, etc.).
- ✓ **Ship-to Address:** Orders will be shipped to the requestor, unless otherwise indicated.

**Request for Vendor Payment:** (e.g. FedEx, Arrowhead, Verizon, Publications, and Subscriptions, Airfare etc.)

- ✓ **Description of Services:** provide detailed description of service, including type, dates, and purpose. Do not use acronyms or abbreviations. For example: “Cell phone charges for phone #XXX-XXX-XXXX for the month of October 2008 for President Mark Yudof.”
- ✓ **Airfare:** Send itinerary email with authorized signature.

**Signatures:** The requestor will function as the contact for questions about the purchase/payment request. The Approving Authority must have delegated authority to commit funds. Contact the BRC Accountability Manager, Amal Smith x 70941 for more information.

If you have any questions or concerns, contact your Team Lead:

Blue Team Lead, Karen Tomajan x 79584 email: [brcblue@ucop.edu](mailto:brcblue@ucop.edu)

Gold Team Lead, Sharon Perry x 70220 email: [brcgold@ucop.edu](mailto:brcgold@ucop.edu)

Purple Team Lead, Gigi Stollar x 79160 email: [brcpurple@ucop.edu](mailto:brcpurple@ucop.edu)