Museum of Vertebrate Zoology

Purchasing Lab Services

This document outlines the process for purchasing lab services from off-campus suppliers. It was created to be used as a reference for researchers within the Museum of Vertebrate Zoology, UC Berkeley. The process in brief:

1. Vendoring - Be sure the supplier is in the UC Berkeley system, if not add vendor
2. Service order Request in BearBuy to create a PO *BEFORE* services are rendered
3. Submit Invoice for Payment of services after they are received

Once your order is in BearBuy you can track the status if your order. See "How to Find the Status of your Order": https://supplychain.berkeley.edu/procurement/how-find-status-your-order

Vendoring

Information about Vendoring can be found here: https://supplychain.berkeley.edu/vendoring

Check to see if supplier is in the UC Berkeley system

- Log into BearBuy (https:/bearbuy.is.berkeley.edu) and follow these instructions: https://supplychain.berkeley.edu/sites/default/files/searching_viewing_supplier_profiles_in_bearbuy_062017.pdf
- Note that suppliers may have different official names for vendoring purposes. For example: Argonne National Laboratory is part of University of Chicago, so you would search for "University of Chicago" and NOT "Argonne National Laboratory"
- If the vendor is not active or not in the system, see below

Reactivating a Supplier

- See "Reactivate a supplier": https://supplychain.berkeley.edu/vendoring/how

Adding a Vendor

See "New supplier": https://supplychain.berkeley.edu/vendoring/how

- Send Vendor form AND Conflict of Interest form to the supplier and have them return to you
    - Vendor form: https://supplychain.berkeley.edu/sites/default/files/ucb_substitute_w-9_and_supplier_information_form_01062015.pdf
    - Conflict of Interest form: https://supplychain.berkeley.edu/sites/default/files/conflict_of_interest_11-16-2018.docx
    - You complete section 2 of Vendor Form and make sure the field "DESCRIPTION OF BUSINESS OR SERVICE PROVIDING TO UC BERKELEY" is completed in section 1 (e.g. select "Other" and note "Lab Services")
- Fax forms together to campus vendoring as directed on vendor form
    - Best Practice: be sure to include a cover page (on clipboard above machine in front office), and request a confirmation report be printed by the front office fax machine

Create a PO – Service Order Request

To request a PO you will need:

1. Cost estimate or quote for services
2. Timeframe for services (if blanket PO – should not be greater than 1 year)
3. Contract requiring signature (if required by supplier)
4. Proof of liability insurance from the supplier
5. UCOP Source Selection & Price Reasonableness Justification Form (or all Federally Funded purchases ≥$10,000 and Non-Federally Funded purchases ≥$50,000)

Same process for Blanket PO and Single Service PO

- For Blanket PO, add comment to BearBuy Cart (see below)

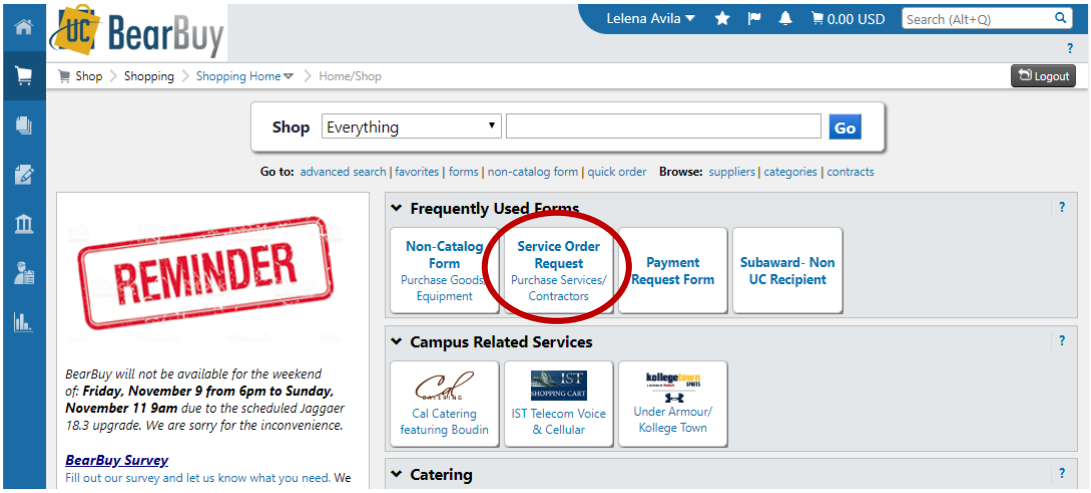
If your purchase is for more than $99,999.99, please contact your Supply Chain Management (SCM) Buyer ***BEFORE*** submitting a requisition in BearBuy. Find your department's SCM Buyer here

Service Request Form

Log in to BearBuy (https:/bearbuy.is.berkeley.edu)

Information regarding BearBuy including Training Information/Job Aids can be found here: https://supplychain.berkeley.edu/bearbuy

- Open Service Order Request Form – it will open in a new window:



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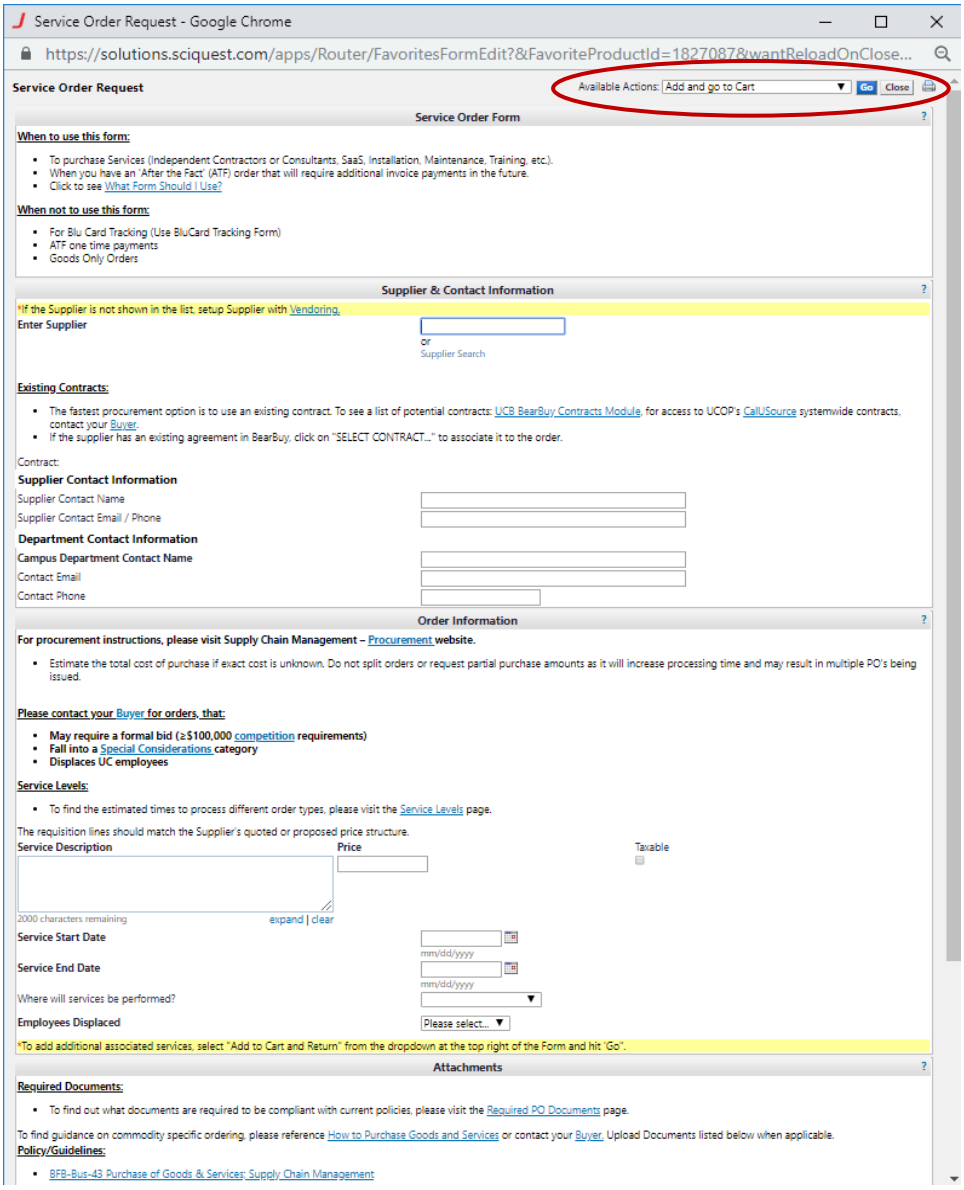
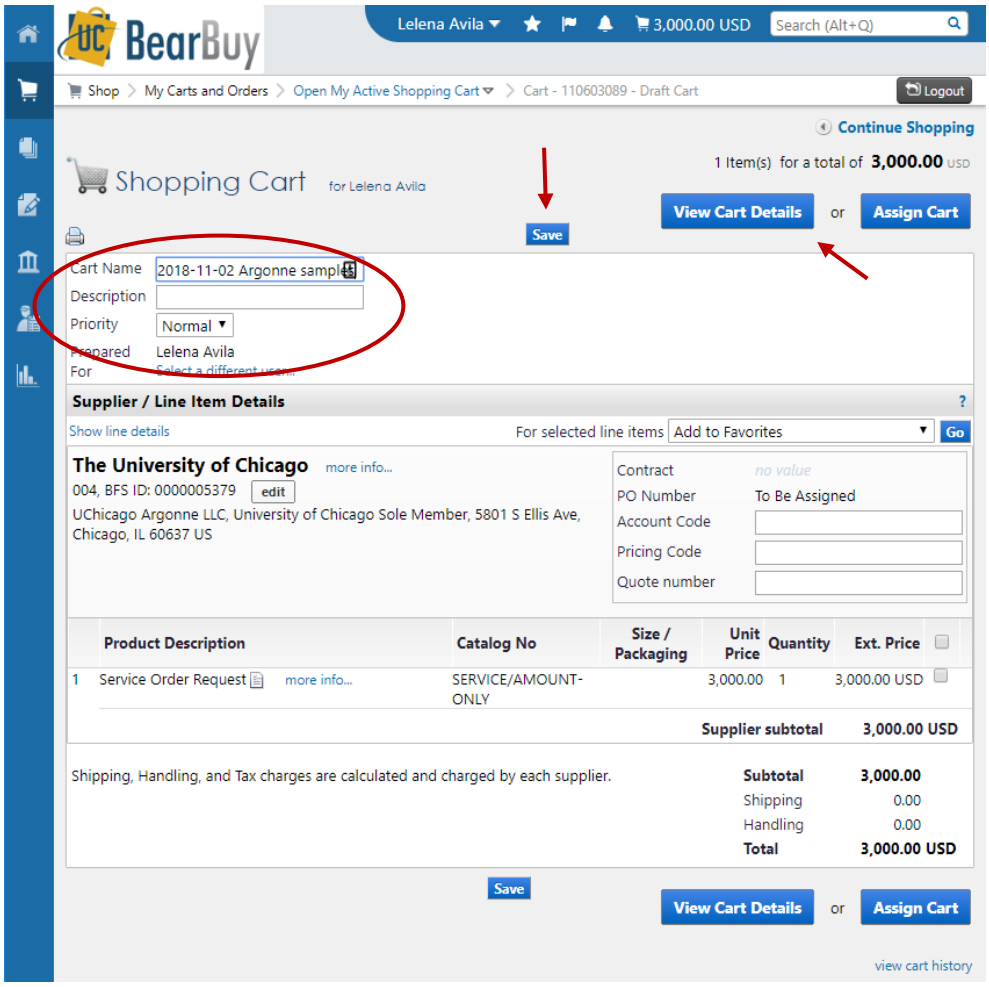
- Complete the form
  - Enter Requested Info
  - Attach required information – see list above
- "Add and go to Cart"
  - This will close the form window and attach the form as well as any documents you attached to it to a new BearBuy cart

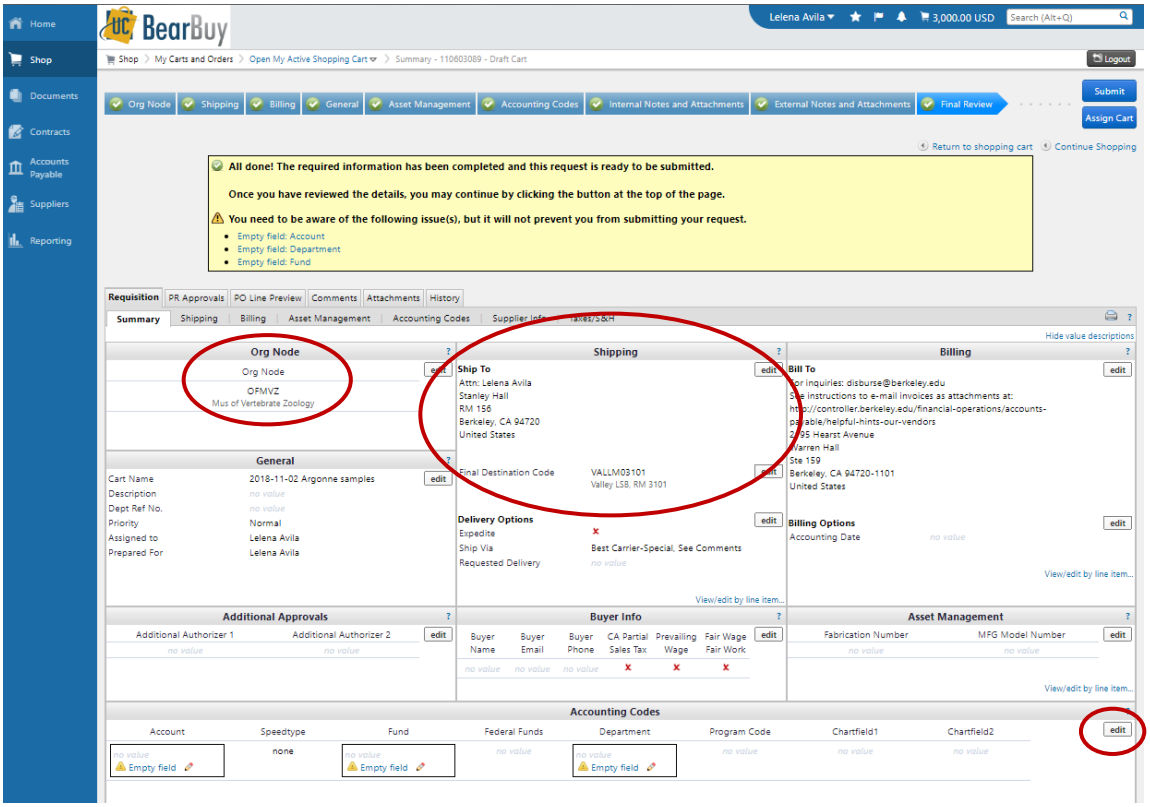


Complete BearBuy Cart

- Set BearBuy cart name and priority
  - Do not change priority to urgent unless it is actually urgent
  - if you have a contract from the supplier that requires a signature within one week, you may want to choose “urgent” and add a comment to your cart indicating that the signed contract is due to the supplier by a certain date
- Click “Save” and Click “View Cart Details”

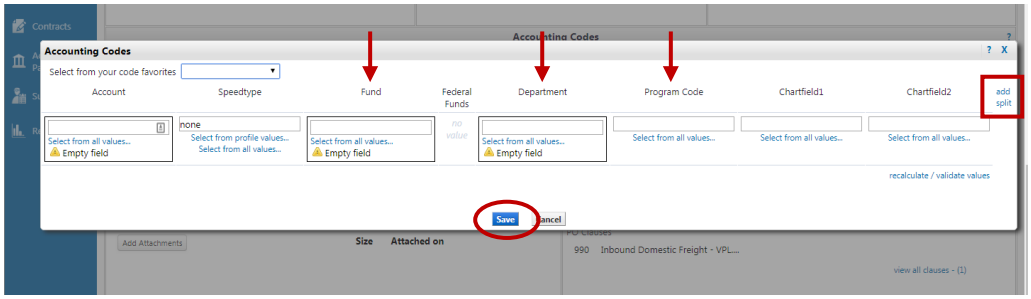


- Complete and verify cart details
  - "Org Node" - verify that it is entered and is correct (OFMVZ = MVZ funds, IBIBI = IB funds)
    - If you are unsure where your funds are housed ask the Research Administrator or Financial Analyst who manages your fund
  - "Ship To" - Verify that your information is entered and is correct
    - How to setup Ship To address in BearBuy Profile Management: https://supplychain.berkeley.edu/how-setup-ship-address-bearbuy-profile-management



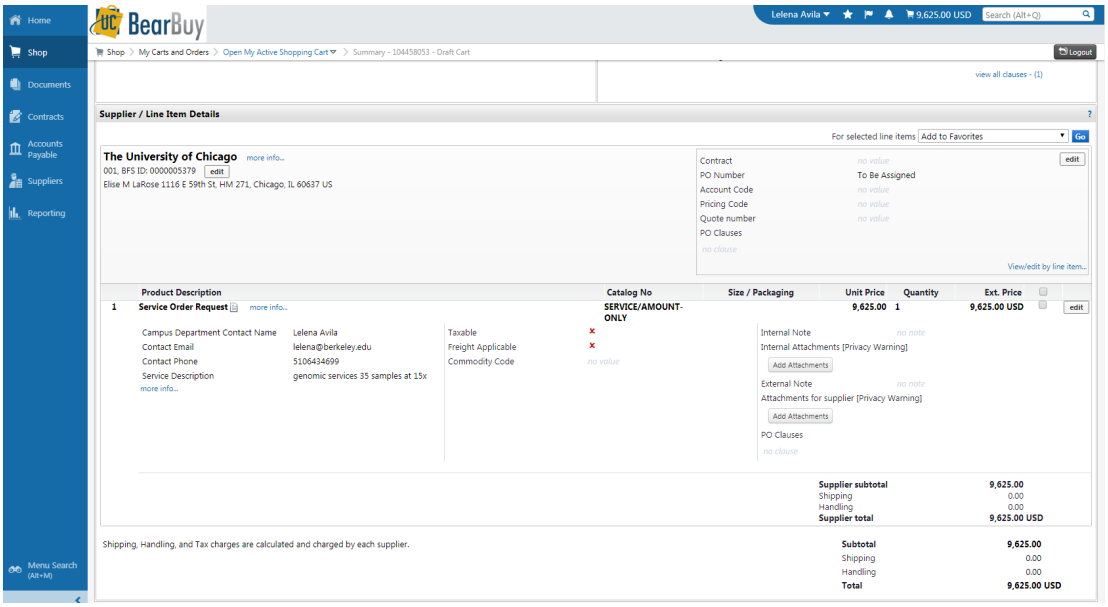
  - Chartstring - Scroll down to the "Accounting Codes" section and click the "edit" button (new window will pop up – see below)

- At minimum your chartstring should include “Fund”, “Department”, and “Program code” (e.g. NNNNN-NNNNN-NN)
- Some chartstrings also include a Chartfield 1 (six characters) and/or Chartfield 2 (five characters)
- “Account” field – leave blank (central campus will enter this number)



- More than one chartstring? Click “add split” at the top right of the window
- “Save” - when you are done (window will close)

- “Supplier / Line Item Details” - Scroll down the page to verify these details are correct. You can click on “more info…” next to “Service Order Request” to review the Service Order Request form you completed



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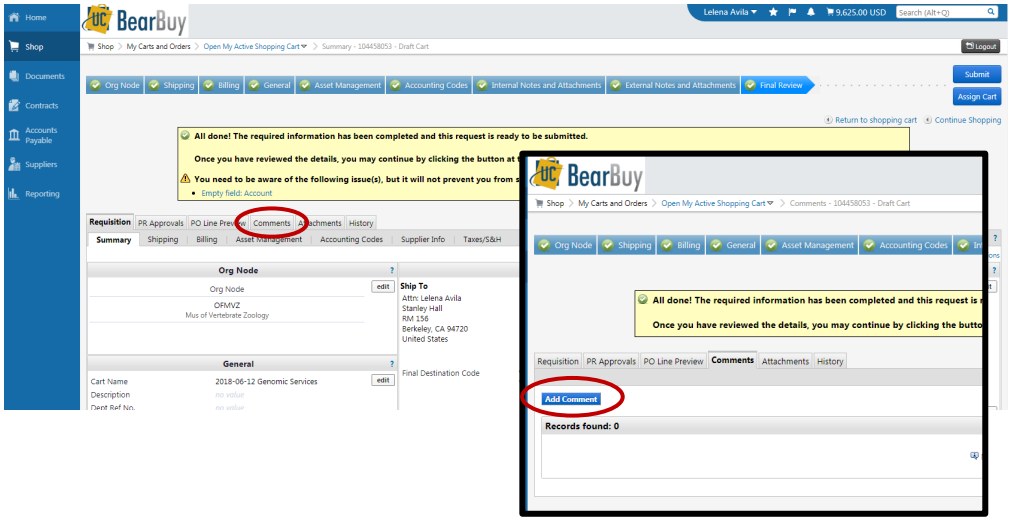
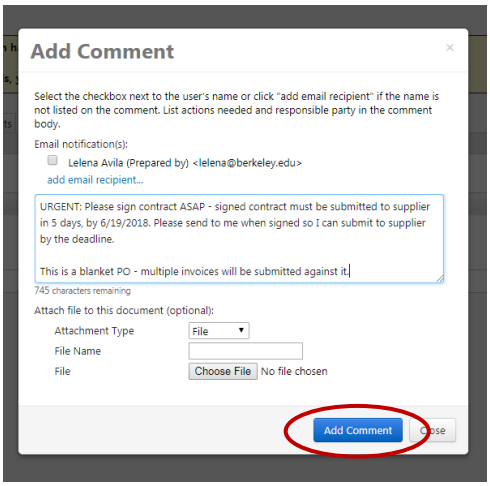
- Add comment(s)
  - Click the “Comments” tab at the top of the page
  - Then click the blue “Add Comment” button

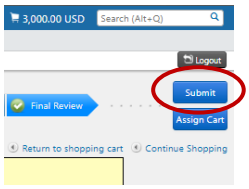


  - Add your comments in the pop-up window, add email recipients (optional), then click the blue “Add Comment” button.



    - **Blanket PO** – be sure to note that this is a Blanket PO, that multiple invoices will be submitted against it, the estimated number of samples, and the time frame for the work.
    - **Contract Signature** – be sure to note if there is a contract that needs signature, timeframe or deadline to obtain it (if applicable), and any other instruction (i.e. return signed contract to you, etc.)
  - Once you add your comment it cannot be edited.

- Submit Cart
  - Click the blue “Submit” button (top right of cart) when all info is added and verified



Follow-up

- Receive email from BearBuy
  - When a PO has been created, you should receive an email from bearbuyadmin@berkeley.edu with subject "Purchase Order #: [PO number] has been sent to the following supplier: [Supplier name]"
  - The PO number begins with "BB"
- Send email to Supplier (optional)
  - To make sure there is no communication error, I prefer to email my contact at the supplier, let them know the PO has been issued by the university, and give them the PO number for reference so they can include it on their invoices.
- Check on Contract (if applicable)
  - Best Practice: Once you receive the PO number it is a good time to check on the status of the contract (if you submitted on for signature)

Submit Invoice for Payment

E-mail invoice

When you receive an invoice from the supplier, you will email the invoice to central campus for payment. E-mail and attachments will interface automatically with the campus imaging system.

Follow their instructions ***exactly*** (scroll down to "How to send us an invoice":

https://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors

You will NOT receive a confirmation that they have received your invoice

Follow-up

You can view the progress of your invoice in BearBuy. It usually takes a day or two for your invoice to show up in the system.

How to Find the Status of your Order: https://supplychain.berkeley.edu/procurement/how-find-status-your-order