

Entertainment Certification Form Instructions

The Entertainment Certification Form is designed to be completed on the computer (the rows will automatically expand to accommodate your information) and then printed for signature by the host and the approver. You may also complete it by hand, as long as your writing is legible.

When should you complete this form?

Please complete and submit this form to Business Services **at the time you place your catering order**; you no longer need to wait until after your event. And, you only need to complete one Entertainment Certification Form to describe multiple activities that are related to a single event, such as a conference that includes several hosted meals (breakfasts, lunches, receptions, dinners).

Per-person meal expense limits

The host or event coordinator is responsible for obtaining the **Dean's approval in advance** if you anticipate exceeding these per-person meal expense limits: breakfast **\$26**, lunch **\$38**, dinner **\$64**, and light refreshments **\$17**. Your clinic or center may have established lower maximums, so check before you spend.

The Dean has a delegation of authority to approve exceptional entertainment expenses up to 200% of the maximum allowed, as long as his approval has been obtained in advance and there is a business necessity for the extra expense. Unless an Entertainment Certification Form is accompanied by the Dean's written approval for payments above these per-person limits (his emailed approval is acceptable) and an explanation of the business reason for the extra expense, reimbursements to individuals may be reduced to the appropriate meal expense limit. Exclude the cost of room or conference facility rental fees, decorations, and equipment rentals from your per-person cost calculation; however, you must include sales tax and service fees or gratuities.

Rush requests

The Event Planner credit card has been established as the University's preferred method of payment for "rush" requests. Vendors who do not accept credit cards should know that checks are typically issued in about 21 days from the date a request has been received in the Disbursements Office. If payment is required in advance, these vendors should submit cost estimates or deposit requests to the host at least 30 days before the event date.

Vendors

The University of California conflict-of-interest policy prohibits University employees from also serving as vendors providing goods and/or services to the campus; there are no exceptions.

Host

This is any individual who was or will be **physically present** at the event(s) and agrees to **sign the certification statement**. The host's signature on the certification statement is required by the IRS for all individual reimbursements, vendor payments and Event Planner card use. The host cannot also serve as the approver; in these situations, an alternative approver will be needed.

Approver

This individual has a *Signature Authorization* form on file and is responsible for approving expenditures against the chartstring shown on the form. Contact Elisabeth Remick (eremick@law.berkeley.edu) if you have questions about signature authorizations. If the approver is also the host and there is no secondary approver for the chartstring, Chief Financial Officer Thomas Cunningham serves as approver.

Guest list options

- Meeting sign-in sheet (*optional, at host's discretion*)
- Participant or attendee list (*names of those who attended*)
- Invitation list (*names to whom invitations were sent, large event, and/or not practical to get names of those attending*)
- Brief explanation why no list is available (*event was open to general public, entire campus community was invited, all 1L's invited, etc.*)

Original receipts

These are required by campus policy for all individual reimbursements and vendor payments. If the original receipt was lost, but a proof of payment is available, include a brief explanation and the proof of payment documentation with your form.

Event Planner credit card

This credit card is Berkeley Law's preferred method of payment for all catering and event-related expenses. You are encouraged to select catering vendors who accept credit card payments by phone or fax. Purchase orders will be prepared for those few vendors who still do not accept credit cards. The Event Planner cardholder will obtain necessary receipts from vendors as part of the credit card transaction process.

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