BerkeleyLaw
UNIVERSITY OF CALIFORNIA

Student Journal Editors Handbook

Fall 2009 Edition

Student Journal Editors Handbook ▪ Fall 2009 Edition

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This handbook has been developed for Berkeley Law journals by the Publications Coordinator.
August 26, 2009

CHAPTER 1: INTRODUCTION

STUDENT JOURNALS

Participation in the law journals enhances the learning experience for Berkeley Law students by providing opportunities to develop and improve legal writing and research skills, with in-depth exposure to a rapidly expanding body of law that augments general course work. Members of Berkeley Law journals are directly involved in all aspects of the publication process - from article evaluation and acceptance through the editorial and printing processes.

In keeping with Berkeley Law's spirit of cooperative education, journal membership is open to all students, with the exception of the California Law Review which holds an annual writing competition to select its membership. First-year students are welcome and encouraged to participate in the law journals.

Asian American Law Journal
Website: *http://www.boalt.org/aalj/*
E-mail: *aalj@law.berkeley.edu*

Berkeley Business Law Journal
Website: *http://www.boalt.org/bblj*
E-mail: *bblj@law.berkeley.edu*

Berkeley Journal of African American Law & Policy
Website: *http://www.bjalp.org*
E-mail: *bjalp@law.berkeley.edu*

Berkeley Journal of Criminal Law
Website: *http://www.bjcl.org*
E-mail: *bjcl@law.berkeley.edu*

Berkeley Journal of Employment and Labor Law
Website: *http://www.bjell.org*
E-mail: *bjell@law.berkeley.edu*

Berkeley Journal of Gender, Law & Justice
Website: *http://boalt.org/bgli/*
E-mail: *bwlj@law.berkeley.edu*

Berkeley Journal of International Law
Website: *http://www.boalt.org/bjil*
E-mail: *bjil@law.berkeley.edu*

Berkeley Journal of Middle Eastern & Islamic Law
Website: *http://www.jmeil.boalt.org*
E-mail: *jmeil@law.berkeley.edu*

Berkeley La Raza Journal
Website: *http://www.boalt.org/lrjl/*
E-mail: *larazajournal@law.berkeley.edu*

Berkeley Technology Law Journal
Website: *http://www.btlj.boalt.org/*
E-mail: *btlj@law.berkeley.edu*

California Law Review
Website: *http://www.californialawreview.org/*
E-mail: *californialawreview@law.berkeley.edu*

Ecology Law Quarterly
Website: *http://www.boalt.org/elq/*
E-mail: *ecologylawquarterly@boalt.org*

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PUBLICATIONS COORDINATOR

The Publications Coordinator provides administrative support to all Berkeley Law journals:

- Orientation and training for journal editors and members
- Purchases and individual reimbursements
- Journal publication
- Subscriptions

The Publications Coordinator is based in the Berkeley Law Center for Research and Administration, located about a mile from Boalt Hall, and is a member of the Berkeley Law Business Services team. This individual has all of the necessary resources (laptop, cell phone, wireless access to electronic journal records) and schedule flexibility to regularly meet with journals in their Boalt Hall offices to provide effective assistance with journal administrative and publication activities. Contact the Publications Coordinator by phone or e-mail to schedule meetings and/or to discuss journal business:

Publications Coordinator
2850 Telegraph Avenue, Suite 561
(510) 643-6600
JournalPublications@law.berkeley.edu

Berkeley Law Business Services
2850 Telegraph Avenue, Suite 561
Orders@law.berkeley.edu

Student Journal Listserv

The student journal listserv streamlines communications between the journals and the Publications Coordinator, gives the journals a means of communicating with each other, and allows anyone with an interest in student journals to subscribe to broadcast messages from the Publications Coordinator. This is a private listserv with password access, which means that the list of members is not available to non-members.

To **subscribe** to the journal listserv, go to:
https://calmail.berkeley.edu/manage/list/listinfo/lawjournals@lists.berkeley.edu
Follow the instructions on the screen to subscribe. You will receive an auto-reply e-mail requesting a confirmation of your subscription request.

To **unsubscribe** from the journal listserv, or to change your options, go to:
https://calmail.berkeley.edu/manage/list/options/lawjournals@lists.berkeley.edu
You will receive a reply message with your instructions.

To **post** to the journals listserv, send your e-mail to *lawjournals@lists.berkeley.edu*.

If you forget your password, there is a button on the Options page that will send you an e-mail with your current password.

Journal Editors Handbook

This handbook and other important journal resources are maintained by the Publications Coordinator on the student journals website: **Berkeley Law home page ➢ For Students ➢ Student Journals**.

CHAPTER 2: BUDGETS, PURCHASES, AND REIMBURSEMENTS

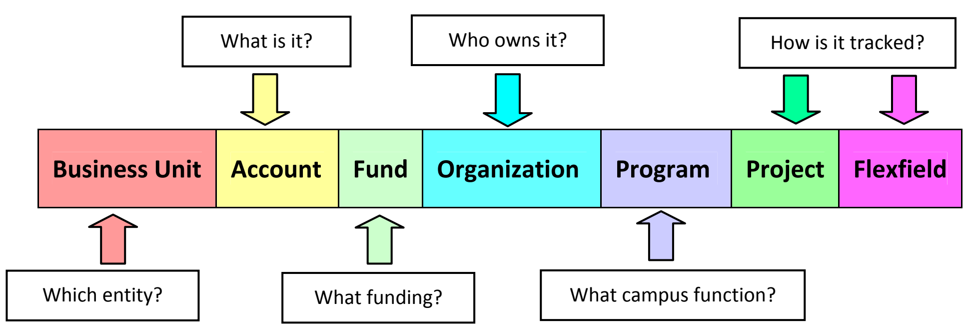
JOURNAL BUDGETS

The designated resource for guidance about journal budgets - subscription revenue, Berkeley Law funds awarded by the Dean, and operating balances carried forward from previous years - is the Berkeley Law Chief Financial Officer, **Laurent Heller**. Laurent is the designated "owner" of the journal budgets, the individual responsible to the Dean and to the central campus for confirming that sufficient funds are available to support journal activities and for approving requested journal expenditures. The Publications Coordinator deposits incoming revenues and processes expenditures against journal budgets in accordance with directives issued by the CFO.

Journals are strongly encouraged to consult with the CFO to develop a budget strategy for the academic year and to consult with the Publications Coordinator about spending those funds effectively.

Chartstrings

Journal business transactions are recorded in the Berkeley Financial System (BFS) using a "Chart of Accounts" which consists of seven **chartfields**. Each chartfield describes a different facet of the financial transaction. The combination of chartfield values is called a **chartstring:**



A chartstring provides a framework for categorizing financial information and organizes financial information in meaningful ways. Each journal has been assigned a unique organization value ("org ID"). One or more separate fund values may be attached to the unique org ID, depending on what sources of money are available to the journal. Other chartfield values are defined by the campus, except optional project and flexfield values which are not used by the journals. The CFO and Publications Coordinator are resources for journal chartstring information.

FUNDRAISING

All Berkeley Law fundraising activities must be coordinated by the Alumni Center - this avoids situations in which more than one clinic, center or group contacts the same donor with unrelated requests for financial support. Deposits of donations and contributions must be processed by the Alumni Center. Contact Gift Manager **Catie Cariaga** to discuss your fundraising plans and/or to obtain the current balance of any gift fund your journal may have:

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Catie Cariaga
Berkeley Law Alumni Center
2850 Telegraph Avenue, Suite 500 #7220
Berkeley, CA 94705-7220
(510) 643-6542
ccariaga@law.berkeley.edu

JOURNAL PURCHASES

The authority to buy goods and services using University funds is delegated in writing to specific individuals by the central campus. Since journals exist under the auspices of the University of California, Berkeley, School of Law, all journal funds are considered "University" funds and are, therefore, governed by these purchasing policies. In Berkeley Law, purchasing authority has been delegated to Business Services. This team has access to BFS to produce University purchase orders and has been issued University procurement credit cards that can be used to buy goods and services from local stores and online vendors on behalf of the student journals.

In today's challenging budget environment, enforcement of the University's policy regarding unauthorized purchases is taken seriously by Berkeley Law. Your purchase is "unauthorized" if a University purchase order or credit card payment guarantee has not been established with a vendor before the desired good and services are received. **This policy has been relaxed, however, for some journal purchases. Members may purchase photocopying, low-quantity office supplies, and office snacks with approval in advance from your journal's managing editor:**

- Always check with your managing editor to obtain approval before spending journal funds.
- Use *orders@law.berkeley.edu* to request a purchase or vendor payment.
- Let Business Services make direct purchases via University credit cards, rather than using personal funds and requesting reimbursement after the purchase.
- Go to the Business Services Forms and Flyers web page for instructions, forms, policy flyers and other helpful administrative resources:
  Berkeley Law home page ➢ For Faculty and Staff ➢ Business Services ➢ Forms and Flyers

Communicating Requests via *orders@law.berkeley.edu*

Business Services uses Footprints, a software system that generates a numbered "ticket" for each incoming e-mail message sent to *orders@law.berkeley.edu* with a request to purchase supplies or services. Messages sent to *orders@law* can be read by the entire Business Services team and delegated electronically to specific individuals for processing, including the Publications Coordinator who takes the lead in providing support to the journals. Incoming messages, or "tickets," receive prompt attention, typically within four hours of receipt by Business Services.

Using the Footprints system is very easy - simply send an e-mail to *orders@law.berkeley.edu* with your request. No special message formatting is necessary but it would be helpful to include this information in your message:

- Name of the journal (acronyms are fine)
- Description of what you want to purchase or order - if you use catalogue item numbers, be sure to indicate the name of the vendor and/or attach a copy of the Kerry's order form to your message. Business Services can help you locate items if you have an idea what you need, but don't know where to purchase it.

- If you plan on placing a food order or catering reservation, include the date of your event, the amount you agreed to pay the vendor or the estimated catering cost, any tip amount, and the vendor's name and phone number. The Card Program Administrator will work with you to get your catering or restaurant vendor paid using the Event Planner credit card.
- You may also send general business inquiries to *orders@law* - remember to include your contact information.

You do not need to include a Check Request Form with your general purchase requests since the Footprints system serves this purpose. You will need to provide a signed and completed Entertainment Certification Form for catering and restaurant orders; the Card Program Administrator and Publications Coordinator will help you with this as needed. The Publications Coordinator will assign the appropriate journal chartstring to your transaction as it is being processed in Business Services.

Buying Supplies and Services

Student journals are free to contact vendors for information and cost quotations for printing, appreciation gifts, equipment, furniture, signage, office supplies, and other general supplies and services. **When you are ready to make a purchase, send your request to *orders@law.berkeley.edu*** with the vendor's cost quotation as an attachment. You may also explain what you need in a message to *orders@law* and let the Business Services team locate a vendor who can provide the desired items at the best price.

Office Supplies

Use the Kerry's Office Supply order form available on the student journals website to compile your shopping list. Send your purchase request to *orders@law* with the completed order form as an attachment.

Printer Cartridges

No forms are necessary to order printer cartridges when you use *orders@law*. Simply provide the number from the empty cartridge (i.e., 53A, Q6470A, etc.) and/or the manufacturer and model number of the printer. It's a good idea to keep one extra cartridge on hand so you can quickly replace an empty cartridge without disrupting office work flow. Reorder a fresh cartridge at the same time you replace the empty one.

Recycle used cartridges by taking them to the Boalt Hall mailroom where they will be picked up by campus Mail Services. Funds generated from the "Rethink Your Ink" cartridge recycling program benefit the entire campus.

Photocopying

Boalt Library Copy Services - journal editors identify "allowed users" at the beginning of each year and monthly copy costs are paid via a University credit card by the Publications Coordinator. Allowed users may also purchase cards that can be used for self-service copying on the Boalt Library Copy Services machines.

Copy Central on Bancroft Way will complete your copy jobs and charge them directly to the Berkeley Law account. Journals must ensure that the names of the allowed user and journal are included on the job invoice before sending this to the Publications Coordinator for payment via a University credit card. If you use **any other copy vendor**, send your request to *orders@law* so the Publications Coordinator can provide the vendor with a credit card number and eliminate the need for you to use personal funds.

Stationery and Letterhead

Send a message to *orders@law* with a description of the type and quantity of printing you need (business cards, letterhead and/or envelopes). Requests for the new Berkeley Law style will be processed by the Publications Coordinator via the Berkeley Law Communications Office. Berkeley law identity style samples are available at: **Berkeley Law home page ➢ For Faculty and Staff ➢ Identity Resources**. Requests using the University seal will be processed by the Publications Coordinator via UC Printing Services.

Requesting Individual Reimbursements for Supply Purchases

Important! Read the flyer, *Minimizing the Risk of Identity Theft* (Appendix 2.8), for an explanation of the difference between a "receipt" and a "proof of payment," and a description of the personal information you should redact before sharing your reimbursement documentation with others.

If you bought journal-related supplies and/or photocopying using personal funds, you can be reimbursed for your purchase by completing a **Check Request Form** (Appendix 2.1). Receipts should be taped carefully to a sheet of clean (not recycled) bond paper - avoid covering any information with tape since this will prevent it from being successfully scanned during processing by the Disbursements Office. This form and instructions are located on the Forms and Flyers web page: **Berkeley Law home page ➢ For Faculty and Staff ➢ Business Services ➢ Forms and Flyers ➢ Paying Vendors.**

There is a **white mailbox located in Boalt Hall** in the stairwell behind the donor wall, across from Steinhart Courtyard - this is where you can deposit anything you want to send to Business Services or to the Publications Coordinator. A student courier empties this box daily and delivers the contents directly to Business Services at the Telegraph Avenue building. You may also use regular campus mail to send your paperwork to Business Services (#7220, 2850 Telegraph Avenue).

Building Services and Keys

Berkeley Law's Director of Operations and the Boalt Hall Building Manager jointly ensure that journal offices in Boalt Hall are well maintained. Use these e-mail addresses to communicate your service requests:

Building maintenance service requests .... *facilities@law.berkeley.edu*
Office door lock service requests .... *keys@law.berkeley.edu*
Phone or voicemail service requests .... *phones@law.berkeley.edu*

Computer Support

To report a **technical problem** with your office computer, servers, or e-mail, send an e-mail message with the following information to *studentcomputing@law.berkeley.edu*:

- Your name
- Journal name
- Room number where computer requiring serviced is located
- Desk location for this computer (if technician needs to perform service when office is vacant)

For **technical assistance with a proposed purchase** of a computer, printer or software, send an e-mail to *trouble@law.berkeley.edu*. All computer-related purchases must be reviewed and approved in advance by Berkeley Law Information Systems and Technology (IS&T) to ensure compatibility with existing Boalt Hall systems.

Mailing

Mail Services is the designated U.S. Post Office for UC Berkeley and, by agreement with the U.S. Postmaster, handles all outgoing U.S. Mail and postage purchases for the entire campus. **In the following address formats, the order of information is important.** U.S. Postal Service automated equipment has been programmed to recognize this format for accurate sorting and delivery of incoming letters to the campus.

Publications Coordinator
Berkeley Law Business Services
2850 Telegraph Avenue, Suite 500 # 7220
Berkeley, CA 94705-7220

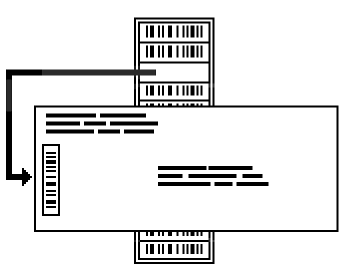
University of California, Berkeley
Berkeley Law
(insert name of journal)
(insert room number) Boalt Hall # 7200
Berkeley, CA 94720-7200

Student journals have access to **barcodes** that serve as postage stamps for outgoing U.S. Mail. As your mail is processed by Mail Services, the barcodes are scanned and postage is charged directly to the journal chartstring.

To request barcodes, send a message to *orders@law*. Barcodes will be delivered to you by Mail Services in about one day. If you plan to do a large mailing, you can use a barcode face sheet which eliminates the need to affix a barcode label to each envelope. Barcoded mail is processed with mail permit ink imprints in lieu of postage stamps.

If you have a bulk mailing and prefer to have **postage stamps** affixed to envelopes, rather than a mail permit imprint, Mail Services has automated equipment that can easily handle this type of request. Journals do not need to purchase stamps separately for these mailings. Contact the Publications Coordinator for assistance with journal bulk mailings.

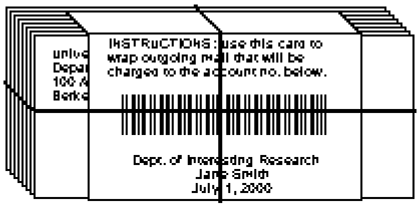
Apply Barcode Labels to Individual Mail Pieces



Pressure-sensitive labels can be ordered by the Publications Coordinator from Mail Services at your request. Labels will be delivered to you the next day.

Apply these labels to individual mail pieces.

Bundle Mail using a Barcoded Facing Sheet



Bundle mail and wrap each bundle with a barcoded facing sheet. The facing sheets can be printed on demand by the Publications Coordinator directly from the Mail Services website at your request.

Expedited Shipping

FedEx (domestic) and **DHL** (international) are the selected vendors for expedited shipping services. The Publications Coordinator will assist journals with account numbers and shipping supplies.

EVENTS AND ENTERTAINMENT

Guidelines for Food and Beverage Purchases

"Entertainment" refers to food and beverages consumed by academic and staff employees, students, donors, guests, visitors, volunteers, and other individuals during the course of a business-related activity (meeting, conference, workshop, class, social event). UC policy governing this type of expense is summarized in the entertainment policy-in-a-nutshell flyer (Appendix 2.2), and **all policies apply to Berkeley Law journals**.

Business Services has an **Event Planner credit card** available to pay vendors directly for journal food and beverage purchases, which can eliminate the need for individual reimbursements for entertainment purchases. The **Card Program Administrator** in Business Services is your resource for event-related plans and purchases, including journal retreats and year-end banquets.

Entertainment Certification Form

As soon as you plan to place a restaurant order or catering reservation, you should complete an Entertainment Certification Form (Appendix 2.3) to tell the Card Program Administrator about the business purpose of your event and to authorize use of the Event Planner credit card to pay for your food/beverage purchases. You'll find this form and instructions on the Forms and Flyers web page: **Berkeley Law home page ➢ For Faculty and Staff ➢ Business Services ➢ Forms and Flyers ➢ Entertainment.**

Event Permits

For your health and safety, certain events require permits issued by the campus Environment, Health & Safety (EH&S) office or the UC Police Department (UCPD). Forms and instructions are available on the website of the permit issuer and the Publications Coordinator will facilitate permit submissions:

- BBQ permit issued by EH&S Fire Marshal
- Alcohol permit issued by UCPD
- Tent permit issued by EH&S Fire Marshal
- Food permits issued by EH&S for events serving more than 25 guests
- Facilities Use Permit for student events hosted in campus venues outside of Berkeley Law

Event Insurance

Journal events held at non-Berkeley Law venues, such as the YMCA on Bancroft Way or International House on Piedmont Avenue, often require a **Certificate of Insurance** for the student group hosting the activity. Since the University's self-insurance program does not cover student groups, journals may be required to purchase an individual policy. The Publications Coordinator can execute this transaction using a corporate credit card and provide a copy of the required insurance certificate to the venue on behalf of journals.

Local Food and Beverage Vendors

A list of preferred food/beverage vendors is available on the Forms and Flyers web page and in this handbook (Appendix 2.4). These vendors have current Certificates of Insurance on file with the campus and have successfully passed city health inspections in the past year. Most vendors on the list accept credit card payments by phone or fax and do not require the Event Planner cardholder to be present when food is delivered to the journal office or Berkeley Law event location.

Office Snacks

Snacks purchased for journal offices may be purchased with approval in advance from the journal's managing editor. Someone other than the buyer should check each item against the store receipt to confirm that all purchases have been received in the journal office, and then provide a "certification of receipt" by signing and dating the receipt itself (not the page on which it is taped). This receipt must accompany a request for reimbursement for office snack purchases.

Requesting Individual Reimbursements for Food/Beverage Purchases

Use the **Entertainment Certification Form** (Appendix 2.4) to request reimbursement for individual purchases of food and beverages. For office snacks, use the Check Request Form instead (Appendix 2.1) since these purchases are considered supplies, not meals. Receipts should be taped carefully to a sheet of clean (not recycled) bond paper - avoid covering any information with tape since this will prevent it from being successfully scanned during processing by the Disbursements Office. You'll find these forms and instructions on the Forms and Flyers web page: **Berkeley Law home page ➢ For Faculty and Staff ➢ Business Services ➢ Forms and Flyers.**

TRAVEL

Planning Business-Related Travel

UC policies governing business-related travel are summarized in the travel policy-in-a-nutshell flyer (Appendix 2.5). **All policies apply to Berkeley Law journals and to their hosted guests.** The flyer, "Planning Business-Related Travel for Berkeley Law and Hosted Guests" (Appendix 2.6), explains how to develop your trip itinerary.

Requesting Individual Reimbursements for Travel Expenses

Use the **Travel Report Form** (Appendix 2.7) to request reimbursement for trip-related expenses, including parking and mileage expenses for local business-related activities. Receipts should be taped carefully to a sheet of clean (not recycled) bond paper - avoid covering any information with tape since this will prevent it from being successfully scanned during processing by the Disbursements Office. You'll find this form and instructions on the Forms and Flyers web page: **Berkeley Law home page ➢ For Faculty and Staff ➢ Business Services ➢ Forms and Flyers ➢ Travel.**

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Check Request Form Instructions

The Check Request Form is designed to be completed on the computer and then printed for signature by the chartstring approver. You may also complete it by hand, if your writing is legible.

When should you complete this form?

Use this form to request individual reimbursements or to authorize payments to vendors for purchases that are not related to entertainment (use the Entertainment Certification Form) or travel (use the Travel Report Form). Unless you have a written delegation of purchasing authority, Berkeley Law Business Services should make your general purchases directly with vendors. Remember that all spending must be approved in advance by the individual who is responsible for the funds that will be used to pay for your purchase.

Make checks payable to

Provide the name of the vendor or the individual who will receive the payment. Include a student or employee ID if you know this information. Use the IRS Form W-9 to request tax identification information from the payee; this form will be used to create a profile in the campus financial system - the BFS vendor ID - and then shredded. You may leave all of the ID boxes blank if you do not know any of this information.

Payment explanation

Describe the reason for the payment. If this payment is a reimbursement to an individual, start the explanation with "Reimbursement for the purchase of…" or "Reimbursement for the payment of…" You may include several non-entertainment, non-travel reimbursements to one individual on the same form. The Check Request Form should always be accompanied by appropriate supporting documentation - store receipts, online order confirmations with payment information, invoices, membership renewal forms, service agreements, letters of invitation or lecture publicity for guest speakers who will receive honoraria or stipends, etc.

Form preparation

Provide the name of the Berkeley Law clinic, center, department or student journal requesting the payment. Provide the name and contact information for the individual who prepared the form and can answer questions about the request.

Chartstring(s)

Provide the chartstring(s) for this purchase. You may write "Faculty Budget," in lieu of a chartstring, if this is appropriate for the request. If you are using many chartstrings, simply add additional rows to the template. Include the dollar amount to be charged to each chartstring; if left blank, the cost will be distributed evenly across all listed chartstrings. Your chartstring should be arranged like one of the following examples. Contact Elisabeth Remick (eremick@law.berkeley.edu) if you need chartstring help.

1-account-20225-11869-43
1-account-20225-11869-43-blank-CL251
1-account-20225-11869-43-CLFACB-CLDE1

Chartstring approval

Print the name of the Berkeley Law individual who has budget responsibility for the chartstring(s) listed on the form. Your order cannot be processed without a valid approval signature on the completed form - the approver is any individual who has a Signature Authorization Form on file in the Disbursements Office for the chartstring(s) listed on the form. Contact Elisabeth Remick (eremick@law.berkeley.edu) for assistance with signature authorizations.

Tax code

Leave this box blank for use by the Disbursements Office.

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Check Request Form

MAKE CHECK PAYABLE TO:

Name:
Address:
City, State Zip
Country

Student ID:

Employee ID

BFS vendor ID

If new payee, attach completed IRS Form W-9

Students: You do not need to provide your address if you have included your SID on the form.

Payee is resident of California: YES NO

Payee is UC Employee: YES NO

PAYMENT EXPLANATION:	Amount
Total amount of payment:	

Name of Berkeley Law clinic/center/department/student journal:

Form prepared by *(name, phone, email address):*

Date prepared:

CHARTSTRING(S):	Amount to be charged:

Chartstring approval name:

Chartstring approval signature:

Tax code:

Rev. 7/31/09

Berkeley Law website ➢ For Faculty & Staff ➢ Business Services ➢ Forms and Flyers

Business and Finance Bulletin 79: Expenditures for Entertainment, Business Meetings and Other Occasions

This policy governs the appropriate use of University funds for business meetings, entertainment functions, and other occasions when meals and/or light refreshments are served to academic and staff employees, students, donors, guests, visitors, volunteers, and other individuals as part of a business meeting or other entertainment event.

Event Planner credit card - before you use personal funds to pay for entertainment expenses, contact Business Services via *orders@law.berkeley.edu* to arrange to have your vendors paid quickly and directly via our Event Planner card.

BUSINESS PURPOSE	What you need to know:
Per Internal Revenue Code, your event must be directly related to or associated with the active conduct of official business in order for you to receive tax-exempt reimbursement of your entertainment expenditures. Under no circumstances should personal expenses be charged to, or temporarily funded by, the University. **You should obtain approval in advance** from an appropriate department or work group authority if you plan to provide meals or light refreshments at your event. **Serving alcohol may be restricted** – check with your department or work group in advance. Spending over the per-person meal limit is considered "exceptional" (an exception to the general policy governing entertainment) and the **Dean's written approval in advance is required**.	Along with your receipts, **provide a copy of any document that describes the event**, such as a program, agenda, invitation, flyer, announcement, or e-mail message. This is the easiest way to explain the business purpose without any extra effort on your part. At the very least, provide the complete title of the event (avoid acronyms) and a short description of the business conducted, if this isn't obvious from the event title or attached document. **Watch your spending limits!** Maximum per-person expenditures for meals and light refreshments: **breakfast $26**, **lunch $38**, **dinner $64** and **light refreshments $17**. Your department or work group may have established lower maximums, so check before you spend.
OFFICIAL HOST	**What you need to know:**
A **host** is a University employee or student who serves as an official University representative at an entertainment event.	In order to qualify as a host, you must be **physically present** at the event and able to **certify that the event was business related** on the reimbursement request.
GUESTS	**What you need to know:**
A **guest** is a person who renders a service to the University or to whom the University wishes to extend goodwill and who is present at a University event at the invitation of a University official authorized to host the activity. A guest may also include an employee from another work location.	A list of your guests is required for reimbursement. Here are some easy ways to provide a guest list: • 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, not practical to get names of those attending)* • Brief explanation why no list is available *(open to the public or to the entire Berkeley Law community, all 1L's, etc.)*
SPOUSES OR PARTNERS OF HOST OR GUESTS	**What you need to know:**
The cost of meals or light refreshments provided to **spouses or partners of hosts or guests** may be reimbursed, provided the expenditure serves a bona fide business purpose –the spouses or partners had a significant role in the proceedings or made an important contribution to the success of the event. Examples include ceremonial functions, fundraising events, alumni gatherings, and community and recruiting events. Reimbursement of these expenses is considered "exceptional" (an exception to the general policy governing entertainment) and **the Dean's written approval in advance is required**.	Along with receipts, **provide a copy of an agenda, invitation or similar document requesting that spouses or partners attend** the event. If spouses or partners did not meet the business purpose criteria, their expenses are ineligible and should be deleted from the reimbursement request. **If a spouse or partner is also a member of the Law School community** (faculty, student or staff) and is attending the event in their official capacity, explain this in a statement on the guest list, such as: "Jane Doe, spouse of John Doe, attended the New Student Reception in her capacity as a member of the Berkeley Law faculty."

BUSINESS MEETING HOSPITALITY	What you need to know:
Reimbursement for meals and light refreshments provided in connection with business meetings involving University employees is allowed when the **expenses occur infrequently**, are **reasonable and appropriate to the business conducted**, and benefit the University. Examples include meetings with a scheduled luncheon speaker, meetings where participants work through the lunch period, or circumstances where it would be too time-consuming or disruptive to event continuity for participants to take a meal break away from the meeting location. **No reimbursement** can be made when employees go to lunch together and their business is an incidental part of the meal, or when meals are provided as a matter of personal convenience only.	Obtain approval in advance to provide refreshments at your meeting. **Get receipts (or an invoice) for your purchases** – a "receipt" is any document that contains these five required elements: 1. Name of vendor (person or company you paid) 2. Amount paid 3. Transaction date (when you paid) 4. Itemized description of goods or services purchased (what you bought). If paying by credit card, submit both the signature slip and the itemized list of menu items ordered. 5. Form of payment (cash, check, credit card). This is not applicable if submitting an invoice for direct payment. When receipts are provided, no other proofs of payment are required. **If a receipt cannot be obtained or was lost**, include a statement explaining why the receipt is not being provided and certifying that the amount claimed is the amount actually paid.
EMPLOYEE MORALE-BUILDING ACTIVITIES	**What you need to know:**
The cost of meals or light refreshments for official employee morale-building activities that serve a University business purpose may be reimbursed as an exception to general policy and typically **require the Dean's approval**. Examples include a gathering to honor a departing employee with at least five years of service, employee recognition receptions, annual picnics, and holiday gatherings.	Obtain approval in advance for your activity from the Dean's Office or other appropriate authority. **Contact Business Services in advance to establish purchase orders** with your selected vendors, or to have us use the Event Planner credit card on your behalf to pay for your purchases. **Get receipts for purchases** you make (see "Business Meeting Hospitality" above). Birthdays, wedding and baby showers, and farewell gatherings for employees with less than five years of service are **not eligible** for reimbursement as business expenses.
MEALS PROVIDED TO STUDENTS	**What you need to know:**
The University may provide meals or light refreshments to students in support of the University's educational program. Eligible activities include classes, study hall, other academic-based activities, orientation programs, commencement exercises, and student meetings.	Obtain approval in advance from an appropriate authority in your department or work group to provide refreshments. **Get receipts for your purchases** (see "Business Meeting Hospitality" above).
APPROVAL AND PAYMENT OF EXPENDITURES	**What you need to know:**
In approving a request to reimburse an employee, the approver determines that the expenditure: 1) Serves a clear and necessary business purpose of benefit to the University, 2) Is reasonable and in accordance with the best use of University funds, 3) Is allowable under IRS regulations and does not create taxable income for an employee or student, 4) Funds are available and the expenditure is allowable under the specified fund source, and 5) Any equally-effective alternatives for accomplishing the desired objectives were considered.	Please use the Berkeley Law version of the *Entertainment Certification Form* to request payments to vendors and/or reimbursements to individuals. Include a guest list and original receipts. Include the Dean's written approval and a business justification for per-person expenses over the spending limit. Entertainment reimbursement requests are now scanned into a database and processed electronically; please don't use a highlighter on your receipts or place tape over important writing, such as prices or the vendor's name, since these actions will prevent a legible scan.
QUESTIONS	Send a message to orders@law.berkeley.edu.

Revised 4/20/09

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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, contact Elisabeth for the name of an appropriate substitute 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.

Forward your completed Entertainment Certification Form and attachments to Business Services via the white courier box located in the stairwell behind the donor wall between the Library and the Registrar's Office, or via campus mail. Our address is # 7220, Business Services, 2850 Telegraph Avenue, Suite 500.

Updated 7/1/09

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Entertainment Certification Form

Please type your responses in the white boxes – this 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 chartstring approver. You may also complete the form by hand if your writing is legible.

What was your event? Meeting, conference, orientation, workshop, roundtable, reception, student activity, etc.	
What was the **business purpose** of your event? How is/was it related to or associated with Berkeley Law business? You may leave this box blank if you attach a flyer, invitation, webpage printout or similar item describing your event.	
Was this a breakfast, lunch, dinner or light refreshments:	
What is/was the date of your event?	If your event has already taken place, how many guests attended?
If your event has multiple dates, please list dates or describe the frequency (weekly, every other Monday, etc.)	If your event is in the future, how many guests have you planned for?
Where did/will your event take place? Use "campus" for UC Berkeley, "Berkeley" for local off-campus locations, or a city name for other locations.	
What is the payment amount? You may leave this blank if the amount is not yet known.	Who will receive the payment? This is the name of the individual to be reimbursed or the name of the business to be paid. *Include SID if recipient is a student (some share similar names).*
If the amount of the per-person meal cost exceeds the maximum allowed, please attach a copy of the Dean's approval. See the form instructions for per-person meal limits.	

Host's Certification Statement:
I hereby certify that the information herein is a true statement of the expenses incurred by me, that such entertainment/meeting expenses were incurred for official University business purposes, and that I have submitted original receipts for all expenses, as required by University policy.

Host's name (print):	Host's signature:
Chartstring approver's name (print):	Chartstring approver's signature:
Chartstring (you may leave the account code blank - student journals may leave this box blank):	
Certification Form preparer's name and phone/email:	Date form was prepared:
If this is a Berkeley Law student journal, include the journal name or acronym:	

Updated 7/7/09

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Popular Berkeley Law Food/Beverage Vendors

These are some of the most popular food vendors used by Berkeley Law. You may place your catering orders directly with any food vendor, but you must ***immediately provide the Event Planner credit cardholder with a completed and signed Entertainment Certification Form and guest list*** *before we can pay for your purchase. All of these vendors provide delivery service if your order is placed with sufficient lead time. Café Zeb order form and "Using Berkeley Law House Accounts" flyer available upon request to* *orders@law.berkeley.edu* *(for Berkeley Law faculty and staff only).*

	Placing your order	Phone	Fax	Website
BREAKFAST	**Café Zeb** *(Boalt Hall cafe, use the Berkeley Law Café Zeb order form)*	510/642-9093	510/642-9093	
	Bancroft Catering	510/549-0113	510/649-1070	
	Cal Catering Express *(available for Boalt and Simon Hall locations only)*	510/643-8505		http://catering.berkeley.edu/
	Noah's Bagels *(call the Telegraph Avenue store directly)*	510/848-9951		http://noahs.com
	Ann's Catering	510/649-0869	510/649-8568	http://anns-catering.com/
	Grub n Go	510/540-5282	510/540-5770	http://www.grubngo.com
	Peet's Coffee and Tea *(use the Telegraph Avenue location)*	510/225-7700		http://www.peets.com
	Travelin' Joe Espresso *(mobile coffee bar service)*	510/843-8730	510/843-8730	http://travelinjoeespresso.com
	Yali's Café	510/843-2233	510/843-2232	http://yaliscafe.com
	International House	510/642-8057	510/643-9373	http://ihouse.berkeley.edu
	Whole Foods Market *(call the Telegraph Avenue store)*	510/649-1333		http://www.wholefoodsmarket.com/stores/berkeley/
	Andronico's Market *(call the Telegraph Avenue store)*	510/845-1062	510/644-2574	www.andronicos.com
LUNCH	**Café Zeb** *(Boalt Hall cafe, use the Berkeley Law Café Zeb order form)*	510/642-9093	510/642-9093	
	Bancroft Catering	510/549-0113	510/649-1070	
	Cal Catering Express *(available for Boalt and Simon Hall locations only)*	510/643-8505		http://catering.berkeley.edu/
	Noah's Bagels *(call the Telegraph Avenue store directly)*	510/848-9951		http://noahs.com
	Café Panini	510/849-0405	510/849-0404	http://www.cafe-panini.net
	Cancun Taqueria *(Mexican)*	510/549-0964		http://www.themenupage.com/cancuncateringmenu.html
	Mehak Indian Cuisine *(North Indian, Tandoori)*	510/841-6118		http://www.mehakberkeley.com/
	May Flower Chinese Restaurant	510/883-9788		
	Manpuku *(sushi, Japanese)*	510/848-2536		
	Extreme Pizza *(use the College Avenue location)*	510/420-0770		http://www.extremepizza.com/menu/index.html
	Mario's La Fiesta Mexican Restaurant	510/486-0151		http://www.marioslafiesta.com/contact.htm
	Gregoire *(use the Berkeley location)*	510/883-1893	510/883-1894	http://gregoirerestaurant.com
	Drunken Fish *(Japanese, sushi)*	510/645-1912		http://gotsushiandsake.com
	Grub n Go	510/540-5282	510/540-5770	http://www.grubngo.com
	West Coast Pizza	510/841-9378		http://homepage.mac.com/lost_bike/wcp/index.html
	Sunrise Deli *(Middle Eastern)*	510/845-9400		

	Placing your order	Phone	Fax	Website
	Quiznos	510/486-2789		http://www.quiznos.com
	Ann's Catering	510/649-0869	510/649-8568	http://anns-catering.com/
	India Palace Restaurant *(North Indian and Tandoori)*	510/848-7252	510/848-7744	http://www.india-palace.com/berkeley/
	International House	510/642-8057	510/643-9373	http://ihouse.berkeley.edu
	SF Soup Company	510/848-7687		http://www.sfsoupco.com/
	La Mediterranee *(Middle Eastern, use the Berkeley location)*	510/540-7773		http://www.cafelamed.com
	La Val's Pizza	510/540-9333		http://www.lavals.com
	Le Cheval *(Vietnamese)*	510/704-8018		http://www.lecheval.com
	Nino's Pizzeria *(Brazilian)*	510/845-9303		http://www.ninosbrazilianpizzas.com
	Oakland Kosher Food *(Kosher and Asian style)*	510/839-0177	510/839-0170	http://oaklandkosherfoods.com/catering1.html
	Picante Catering	510/525-1111	510/526-7486	http://picantecocina.ypguides.net/
	Thai Delight Cuisine	510/549-0611	510/549-0612	http://themenupage.com/thaidelight
	T-Rex Barbeque	510/527-0099		http://t-rex-bbq.com
	Yali's Café	510/843-2233	510/843-2232	http://yaliscafe.com
	Andronico's Market *(call the Telegraph Avenue store)*	510/845-1062	510/644-2574	www.andronicos.com
	Whole Foods Market *(call the Telegraph Avenue store)*	510/649-1333		http://www.wholefoodsmarket.com/stores/berkeley/
DINNER	**Bancroft Catering**	510/549-0113	510/649-1070	
	Cancun Taqueria *(Mexican)*	510/549-0964		http://www.themenupage.com/cancuncateringmenu.html
	Extreme Pizza *(use the College Avenue location)*	510/420-0770		http://www.extremepizza.com/menu/index.html
	Gregoire *(use the Berkeley location)*	510/883-1893	510/883-1894	http://gregoirerestaurant.com
	Ann's Catering	510/649-0869	510/649-8568	http://anns-catering.com/
	India Palace Restaurant *(North Indian and Tandoori)*	510/848-7252	510/848-7744	http://www.india-palace.com/berkeley/
	International House	510/642-8057	510/643-9373	http://ihouse.berkeley.edu
	La Mediterranee *(Middle Eastern, use the Berkeley location)*	510/540-7773		http://www.cafelamed.com
	La Val's Pizza	510/540-9333		http://www.lavals.com
	Le Cheval *(Vietnamese)*	510/704-8018		http://www.lecheval.com
	Nino's Pizzeria *(Brazilian)*	510/845-9303		http://www.ninosbrazilianpizzas.com
	Oakland Kosher Food *(Kosher and Asian style)*	510/839-0177	510/839-0170	http://oaklandkosherfoods.com/catering1.html
	Picante Catering	510/525-1111	510/526-7486	http://picantecocina.ypguides.net/
	Thai Delight Cuisine	510/549-0611	510/549-0612	http://themenupage.com/thaidelight
	T-Rex Barbeque	510/527-0099		http://t-rex-bbq.com
	Andronico's Market *(call the Telegraph Avenue store)*	510/845-1062	510/644-2574	www.andronicos.com
	Whole Foods Market *(call the Telegraph Avenue store)*	510/649-1333		http://www.wholefoodsmarket.com/stores/berkeley/

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Popular Berkeley Law Food/Beverage Vendors

	Placing your order	Phone	Fax	Website
FULL SERVICE CATERING	**Rockridge Market Hall**	510/250-6001	510/652-4669	http://rockridgemarkethall.com
	Lev Delany Catering *(payment by PO only)*	415/724-3730		http://www.levdelanycatering.com
	International House	510/642-8057	510/643-9373	http://ihouse.berkeley.edu
	Grace Street	510/523-6100		http://gracestreetcatering.com
	Pacific Fine Food	510/748-9604	510/748-9694	http://pacificfinefood.com
	Bancroft Catering	510/549-0113	510/649-1070	
RESTAURANTS	**Men's Faculty Club** *(Bar and Kerr Dining Room)*	510/540-5678		http://berkeleyfacultyclub.com
	Women's Faculty Club	510/642-4175		http://www.womensfacultyclub.com
	Adagia Restaurant	510/647-2300		http://adagiarestaurant.com
	Skates on the Bay *(at the Berkeley Marina)*	510/549-1900		http://www.skatesonthebay.com
	Hs Lordship's *(at the Berkeley Marina)*	510/843-2733	510/540-4775	http://www.hslordships.com
BEVERAGES	**BevMo** *(only the Oakland store delivers)*	510/208-5126		http://www.bevmo.com
	College Avenue Wine, Spirits and Deli	510/655-8584		
	Eddie's Drive In Liquors	510/655-0855		
	Andronico's Market *(call the Telegraph Avenue store)*	510/845-1062	510/644-2574	www.andronicos.com

Updated 7/2/09

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POLICY IN A NUTSHELL

Business and Finance Bulletin G-28: Policy and Regulations Governing Travel

This flyer explains how to adequately substantiate the most common trip expenses so you can quickly complete a Travel Report Form upon your return. Travel & Entertainment Services at http://controller.berkeley.edu/travel/ is your primary campus resource for business travel information. Instructions for planning a trip and preparing the form are available by following the website directions at the bottom of this page.

Business Travel Insurance	What you need to do:
When traveling on official University business, employees and students are **covered worldwide, 24 hours a day, for a wide variety of accidents and incidents.** Registration information will verify eligibility to the insurance company in the event a traveler needs to use any benefit, request travel assistance services, or submit a claim.	**Register before each departure** and get a **new confirmation for each trip**. Register at http://www.uctravel.org. Take a copy of the printed confirmation with you on your trip and be sure to leave copies with your office and family.

Business Purpose of Your Trip	What you need to do:
Your trip must have a clear business purpose in order for you to receive tax-exempt reimbursement for your travel expenses. Under no circumstances should personal travel expenses be charged to, or temporarily funded by, the University. If your trip expenses will be reimbursed by non-Berkeley Law host, you may use Berkeley Law funds as long as your host issues your reimbursement payable to UC Regents.	Along with your travel receipts, **provide a copy of any document that describes the event**, such as a program, agenda, invitation, announcement, or e-mail message. This is the easiest way to explain the business purpose. At the very least, **provide the complete title of the conference or meeting** (avoid acronyms) or a detailed description of why you traveled, your dates of travel, and the destination where your business was conducted.

Air Travel	What you need to do:
Use the campus partner agency, Carlson Wagonlit Travel, to plan your itinerary and purchase your airline tickets. Special State of California fares are only available via the partner agency. Contact Carlson: Phone: 800-728-4918, Fax: 866-436-8954 E-mail: cal@carlsonwagonlit.com **Purchase a simple itinerary via Southwest Airlines** online using the campus contract (corporate ID 99266263). Purchase your tickets on the internet. **Reimbursement is limited to coach airfare only.** Fees to change an itinerary, carry extra bags, etc. can be reimbursed if business related. **Avoid purchasing discounted travel packages from internet** vendors unless you can confirm that every item in the package will be itemized separately (hotel daily room charges and tax/fees, for example). **Airline and airport club membership fees** are not eligible for reimbursement, including Clear Cards. **One-day club memberships** may be eligible for reimbursement as a miscellaneous travel expense if required for a significant business purpose.	Whether you paid for airfare yourself or charged it directly to the campus, you'll need to **provide an invoice or itinerary** that includes these required elements: 1) name of vendor (person you paid), 2) amount paid, 3) transaction date (when you paid), 4) form of payment (cash, check, credit card), and 5) flight departures and destinations. If you paid any special fees in addition to your airfare, or purchased a one-day club membership, remember to explain the business purpose on receipts. Internet travel packages lacking adequate detail cannot be reimbursed. IRS rulings on this issue prevent the University from making any exceptions, even for hosted guests who might not have been aware of this restriction.

Ground Transportation	What you need to do:
Use local public transportation such as buses, subway, or streetcars when possible. Shuttle service to and from an airport is allowed. Taxi service should be used only when public transportation or shuttles are impractical or unavailable. **Park/Sleep/Fly packages** offered by the traveler's local airport hotels are not eligible for reimbursement as a business-related expense.	Ask the taxi or shuttle driver for a receipt. When no receipts are available, make a note of expenses, including any tips, as you incur them.

Automobile Travel	What you need to do:
If you prefer driving your private automobile to your destination, instead of flying, reimbursement for expenses while in transit will be based on the equivalent coach airfare plus your estimated transportation costs to and from the nearest airport.	Print a page from the airline website showing an equivalent roundtrip coach airfare for your destination and provide the basis for your estimated transportation costs with your trip receipts.

Automobile Travel (continued)	**What you need to do:**
When you drive your private automobile, you can be reimbursed for mileage at the current IRS rate of 55¢ per mile. You cannot be reimbursed for gasoline purchases or for any roadside assistance if you have car trouble during your trip. The IRS includes these costs in the standard mileage rate.	**A mileage "receipt" is the page from any mapping program** that shows the number of miles between your point of departure and your destination – double the mileage for a roundtrip. **Provide your vehicle license number and certify that you carry liability insurance** on the travel form to receive mileage reimbursement.
Hertz and National/Enterprise are the preferred rental car vendors for the University. Reservations can be made online or by phone and preferred rates are available for both business-related and personal rentals. See the Travel Instructions flyer for details. University contract rates include collision and liability insurance, so any insurance you purchase on your own will not be eligible for reimbursement. Purchase additional insurance for travel in Alaska and Hawaii. Students should purchase additional insurance since campus contracts apply only to employees. You should **rent a compact or economy automobile**, unless you have justification and advance approval for renting a larger vehicle. You can be **reimbursed for gasoline purchases**, but not mileage, when you drive a rental car.	**Make sure the campus contract number is on your rental agreement** – the preferential insurance coverage won't be in effect otherwise. Take a copy of the list of campus rental car contracts with you in case you need to change agencies while you're on your trip. **Avoid express check-in.** When you return your car, go inside to the counter and pay your bill. This will allow you to obtain the detailed receipt showing charges and payments you'll need for reimbursement *and* you'll ensure that the agency doesn't claim vehicle damage later. Make sure you always get receipts for gasoline purchases.

Lodging, Meals and Incidentals	**What you need to do:**
"Lodging" includes a single-occupancy room rate, along with associated taxes and fees. Sharing your room with a non-business traveler, such as your spouse, does not impact your reimbursement when the single rate is the same as the double-occupancy rate. When there is a difference in room rates and you have shared your room with a non-business traveler, ask the front desk at check-out to quote the single rate and associated taxes and fees. Make a note directly on your zero-balance receipt – the single rate will be your reimbursement.	**Avoid express check-out** at hotels; always check out at the front desk in order to obtain the required **"zero balance" receipt** showing all of your charges and your payment. Express check-out statements are not accepted - you must have a statement that shows the amount and date of your actual payment to the hotel. Personal services, such as mini-bar use, in-room movies and spa treatments, are not eligible for reimbursement. If these charges appear on your bill, deduct them from the total and make sure you clearly indicate that they are not to be reimbursed as business expenses.
If you need to cancel a hotel reservation, make sure to do this in advance to avoid a penalty and get a cancellation number.	Unless you have a compelling business reason for not having cancelled a hotel reservation in advance, you may find that the penalty – typically the cost of one night's stay – is not eligible for reimbursement.
If you stay with a friend or relative while on official University business, you may provide your host with a non-cash gift (flowers, groceries, restaurant meal) – one gift per stay.	The actual cost of a gift to your host is eligible for reimbursement up to $75. Receipts are required for gifts costing $25 or more.
"Incidentals" are separate tips and gratuities paid to baggage handlers, porters, bellhops, maids and such. Meal and taxi tips should be included in the reported costs of those services.	Since there are no receipts associated with incidental expenses, make a note of your reasonable actual costs as you incur them.
Reimbursement for meals and incidentals is capped at $64 per day. This is not a per diem – you will be reimbursed only for daily actual expenses, up to a maximum of $64, for trips lasting more than one and less than 29 days. Unused portions of the $64 limit do not carry over from one day to the next. **Trips lasting longer than 29 days** are eligible for a per diem. **Trips lasting less than 24 hours** are not eligible for meals and incidentals unless there is an overnight stay. If you **hosted a business meal** with colleagues during your trip, you can be reimbursed for the full cost of the meal, up to the per-person meal limits, as "entertainment while on travel status."	**Always get a cash register or credit card receipt for your food purchases.** If a receipt cannot be provided by the vendor, then make a note of your actual expense. If you submit meal receipts that exceed the daily limit, the online travel reimbursement system will automatically cap your payment at the daily limit. For group meals you hosted, provide the names and affiliations of meal participants and a description of the business purpose on your receipt. Per-person meal expense limits are available on the entertainment policy flyer.
Miscellaneous expenses, such as internet fees to connect remotely with the campus, phone calls, and copying and fax charges from the hotel's business center can be reimbursed. Laundry expenses while traveling can be reimbursed if the trip exceeds six days at your destination.	Whenever possible, get a receipt for the miscellaneous expense and make a note of the business purpose on it. If these expenses are included on your hotel bill, make a note of the business purpose for each cost.

Updated 7/2/09

BerkeleyLaw
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Planning Business-Related Travel for Berkeley Law and Hosted Guests

*The Travel & Entertainment Services website at **http://controller.berkeley.edu/travel/** is your primary campus resource for business travel information. The "Policy in a Nutshell" flyer for travel available on the Berkeley Law website summarizes the University of California rules for travel. "Hosted" guests are those individuals whose business trip expenses will be paid by Berkeley Law.*

	You or your assigned faculty are the traveler:	A hosted guest of Berkeley Law is the traveler:
Insurance	When traveling on official University business, employees and students are **covered worldwide, 24 hours a day, for a wide variety of accidents and incidents. Register before each departure** and get a **new confirmation for each trip**. Register at http://www.uctravel.org. Take a copy of the printed confirmation with you on your trip and be sure to leave copies with your office and family.	University travel insurance is not available for hosted guests, although they may be covered by a similar policy provided by their home institution or company.
Airfare	**Your options:** **Contact the campus travel agency**, Carlson Wagonlit Travel, to work directly with an agent who will find an itinerary that meets your trip and budget requirements: phone **800-728-4918** or email **cal@carlsonwagonlit.com**. Pay via a CTS form faxed to the agency – this form is available on the Travel Services website. **Purchase airfare on the internet** using a personal credit card. **Southwest Airlines** offers discounted fares via the campus contract (corporate ID 99266263). Print copies of your receipt for reimbursement after the trip. **Purchase a discounted travel package from the internet** using a personal credit card ONLY if you can confirm that every item in the package will be itemized separately (airfare and flight itinerary, hotel daily room charges and tax/fees, for example). **Airline and airport club membership fees** are not eligible for reimbursement, including Clear Cards. **One-day club memberships**, however, may be eligible for reimbursement as a miscellaneous travel expense if required for a significant business purpose. Use a personal credit card to make the purchase and get a receipt for possible reimbursement.	**Your options:** **Contact the campus travel agency on behalf of your hosted guest**, Carlson Wagonlit Travel, to arrange an itinerary that meets your guest's preferences: phone **800-728-4918** or email **cal@carlsonwagonlit.com**. Pay via a CTS form faxed to the agency. **Let your hosted guest contact the campus travel agency directly.** To authorize the agency to work with your guest, send an email to cal@carlsonwagonlit.com. Provide the guest's name and contact information and request a copy of the approved reservation so you can prepare a CTS form for payment. **Guests may also purchase airfare on their own.** Make sure you share a copy of the travel policy flyer with your guest in advance since reimbursement will be based on these guidelines.
Ground Transportation	**Your options:** You may use shuttle or taxi service to get to and from SFO or OAK airports using personal funds. Take BART if this is a practical and safe alternative, or drive/park your personal vehicle. **Park/Sleep/Fly packages** offered by SF and Oakland airport hotels are not eligible for reimbursement as a business-related expense.	**Your options:** Send a request to orders@law.berkeley.edu to arrange direct-billed local ground transportation for your guest. Include the complete flight itinerary, drop-off destination, cell phone number for the passenger, and a chartstring. You will receive an electronic confirmation from Business Services to send to your guest. Ground transportation expenses incurred by your guest at their home location must be reimbursed after the trip since we have no way to pre-pay these costs.

	You or your assigned faculty are the traveler:	A hosted guest of Berkeley Law is the traveler:
Private Cars	**Your options:** **When you drive your private automobile, you can be reimbursed for mileage** at the current IRS rate of 55¢ per mile. You cannot be reimbursed for gasoline purchases or for any roadside assistance if you have car trouble during your trip. The IRS includes these costs in the standard mileage rate. **If you prefer driving your private automobile to your destination,** instead of flying, reimbursement for expenses while in transit will be based on regular coach airfare plus your estimated transportation costs to and from the nearest airport.	**Your options:** Berkeley Law traveler guidelines also apply to your hosted guests who drive personal vehicles to the Bay Area. These expenses are reimbursed to the traveler after the trip.
Rental Cars	**Your options:** **Contact one of these UC-contract companies directly.** If you reserve by phone, identify yourself as a University employee. CDW/LDW and SLI coverage are included in the contract rates. **Enterprise:** 1-800-261-7331 or http://www.enterprise.com using Corporate Number XZ23A01. **Hertz:** 1-888-222-0286 or http://link.hertz.com using CDP 71864. **National:** 1-800-227-7368 or http://www.nationalcar.com using Contract ID 5007818. **Reserve a rental car through the campus travel agency** (see Airfare above for contact information).	**Your options:** **Reserve a car through the campus travel agency** (see the Airfare section for contact information). University contract rates are not available to hosted guests, although special rates may be available through contracts with the guest's home institution. Ask your guest if other corporate, CDP, or contract numbers are available for the travel agency to use. **Reserve a car by phone or internet on behalf of your guest.** Due to liability issues, rental car costs must be paid by the hosted guest and reimbursed after the trip. You may also reserve a rental car for your guest, as a courtesy, even if no reimbursement for this expense is being offered by Berkeley Law.
Hotels	**Your options:** **Let the campus travel agency assist you with your hotel reservations** (see the Airfare section for contact information)**.** They can research best prices from among the UC Berkeley preferred national hotel chains. **Contact the UC Berkeley preferred national hotel chains directly.** Find detailed instructions at http://www.ucop.edu/travel/hotel.html. **Marriott** properties include Courtyard, Residence Inn, Ritz-Carlton, Springhill Suites, Fairfield Inn, and Town Place Suites. **Starwood Hotels** properties include Four Points by Sheraton, Le Meridien, Sheraton, St. Regis, and Westin. **Wyndham Hotel Group** properties include AmeriHost Inn, Baymont inns, Days Inn, Howard Johnson, Knights Inn, Super 8, Ramada, Travelodge, Wingate by Wyndham, and Wyndham Hotels and Resorts.	**Your options:** **Let Business Services make the reservation and payment guarantee directly with your preferred local hotel.** These hotels include the Claremont Resort, Hotel Durant, Bancroft Hotel and the Doubletree Berkeley Marina. See the "Local Hotels" flyer for contact and other information. Send a request to orders@law.berkeley.edu with the name of your guest, check-in and check-out dates, the charges you will cover, and a chartstring. Typical charges are room and taxes, resort fees, parking, and meals charged to hotel restaurants and/or room service for your guest or your guest and spouse/companion. Business Services will work with you to obtain exceptional approvals, when needed, and will provide you with an electronic confirmation you can share with your guest. **You may make hotel reservations yourself**, but a payment guarantee is not in place for your guest until Business Services has provided the appropriate signed Event Planner credit card or purchase order authorization form directly to the hotel's accounting office. Send your confirmation information to orders@law.berkeley.edu to request the payment guarantee for your guest's reservation.

Updated 7/2/09

Travel Report Form Instructions

This form is designed to be completed on the computer - cell formulas in the template calculate total expenses automatically - and then printed for signature by the host and the approver. The Travel Report Form sections correspond to the online travel reimbursement system screens. You may also complete this form by hand, if your writing is legible. Refer to the Travel Policy in a Nutshell flyer for an explanation of trip expenses eligible for reimbursement.

Receipts and other Travel Report Form attachments: All of your attachments will be scanned directly into the travel reimbursement system database. You may submit receipts as loose items in a sealed envelope attached to your Travel Report Form and let Business Services prepare these for scanning on your behalf. You may also carefully tape your receipts to blank sheets of 8 ½"x11" white paper. Please don't use recycled paper since irrelevant printing on the reverse will be scanned into your travel report. Keep tape away from any printing on receipts since taped areas scan as blank space due to reflected light from the scanner.

Business and personal expenses in the same trip: Complete the Travel Report Form and include a note explaining what expenses, portions of expenses, or trip dates are related to personal business. Business Services will prepare a reimbursement request that accurately reports only your business-related expenses.

Traveler Information

Traveler's Name: Provide the traveler's full name.

Employee/Student ID: Use the traveler's UC Berkeley employee or student ID, NEVER a social security number. If the traveler is not a UC Berkeley employee or student and this report will be their first payment from the University, a completed IRS Request for Taxpayer Certification (W-9) form should accompany this report. This information will allow Business Services to create a profile for that individual in the campus financial system.

Vehicle License, City of Residence, Liability Insurance: The vehicle license, city of residence and confirmation of liability insurance are required only if the traveler is requesting mileage reimbursement.

Trip Information

Trip Purpose: Briefly explain the business purpose of the trip; avoid acronyms in your description for the benefit of the travel auditor. Easy shortcut – just attach a copy of the agenda, program, flyer, web page printout, letter of invitation, or announcement describing the event.

Trip Destination: This should be the city and state in which activity core to the trip's purpose took place. If your trip had multiple destinations, indicate each location and the dates of travel for that location separately in this section of the form or on the attached documentation. This information allows daily expenses reported in the Location Expenses section to be assessed accurately by the travel auditor.

Date/Time Traveler Left and Returned to Home/Office: If the actual dates/times a traveler left and returned are unknown, use the information shown on the airline itinerary. This information is important because meal and incidental expenses are reimbursed based on the number of hours on travel status.

Location Expenses - Transportation

CTS Airfare: Report airfare billed directly to the campus in this column; values reported in this column are excluded from the amount of reimbursement. Include a copy of the paid Carlson Wagonlit airline itinerary or the signed CTS form.

Traveler Airfare: Report airfare paid by the traveler in this column; these values are included in the reimbursement. Include a copy of the paid airline itinerary (eTicket or receipt). If you paid any special airline fees to change your flight itinerary or transport bags over the weight limit, include these receipts and a brief explanation of the business necessity for these charges.

BART/Bus: Report fares paid by the traveler in this column. No receipts are required. The column allows you to itemize up to three separate fares; if you have more than three fares to report, enter a total of all fares in one of the cells and then list the individual amounts on the attached documentation.

Parking: The column allows you to report up to three separate parking fees; if you have more than three fares to report, enter a total of all fees in one cell and then list the individual amounts on the attached documentation or provide receipts. You may also use this section to report local parking fees incurred as part of your attendance at area business meetings, conferences and other business-related activities.

Mileage: Report mileage as the number of miles driven times .55 cents/mile for trips on or after 1/1/09, and 58.5 cents/mile for trips on or after 7/1/08 and before 12/31/08. No receipts are required, although it is very helpful to include a Mapquest or similar printout confirming the number of miles between your point of departure and your destination. IRS mileage rates include the cost of gasoline, insurance and vehicle upkeep, so there is no additional reimbursement for these costs.

Rail/Train: Report Amtrak and other rail fares in this column. The column allows you to itemize up to three separate fares; if you have more than three fares to report, enter a total of all fares in one of the cells and then list the individual amounts on the attached documentation. Receipts are required.

Rental Car: Your documentation must include a zero-balance invoice or receipt showing both the itemized charges and your confirmed payment. You may be reimbursed for gasoline purchased for a rental car, so remember to include these receipts with your report.

Shuttle/Taxi: The column allows you to itemize up to three separate fares; if you have more than three fares to report, enter a total of all fares in one of the cells and then list the individual amounts on the attached documentation. No receipts are required for fares less than $75 each.

Tolls: Enter the amount of toll fees. No receipts are required, although it is helpful to note the bridge or toll road name on the attached documentation if this information is known.

Other: Report any other transportation-related expense in this column and add an explanation or include a receipt with the attached documentation. Report airline baggage fees here, for example.

Location Expenses – Miscellaneous

Copying, Fax, Computer and Phone: These expenses are often part of your hotel bill; if so, you may report them separately here, or simply report the full cost of hotel charges as lodging and let the TRV report preparer make the appropriate adjustments in the online reimbursement system. No receipts are required unless an expense is $75 or greater.

Store Luggage: Report any hotel fees to store your luggage in this column. Report airline baggage fees as an "other" transportation expense in that section of the form.

Meeting Room and A/V Equipment Fees: Report the cost of rooms used for interviews or other official University business (not sleeping rooms) and the cost of hotel-provided rental equipment in this column.

Laundry: Laundry expenses may be reimbursed as a business expense only for trips lasting six or more days at the destination, unless there is a compelling reason and an explanation is included in the attached documentation. The cost to launder or dry clean clothing before or after a trip is not eligible for reimbursement.

For international travel: Report costs for passports, visas, and tourist cards; necessary photographs; fees for birth and/or health certificates; inoculations; costs to hire guides, translators, and local labor related to the business purpose of your trip; and collision insurance for rented vehicles in these columns. Receipts are required.

Registration Fees: Report only registration fees paid during the trip, not fees paid in advance of travel. Receipts are required.

Daily Expenses

Trip Dates: Enter the dates of your trip across the top of these columns.

Meals: For domestic travel of less than 30 days, there is no per diem; report actual expenses for meals. Receipts are preferred, but not required for meal expenses of less than $75 each. Incidentals are tips and gratuities paid individually to maids, porters, and baggage handlers. If you paid for a meal that included others, write the name and affiliation of each participant on or next to that receipt. Hosted meals are reported as "University employee on travel status" by the TRV report preparer and reimbursement is allowed to the appropriate maximum meal allowance for each participant.

International travel: Check the box of the preferred option for reporting daily expenses. Foreign per diem values are available on the U.S. Department of State Office of Allowances website: http://aoprals.state.gov/web920/per_diem.asp. The TRV report preparer will make any necessary currency conversions for attached receipts, unless conversion rates have been provided by the traveler.

Lodging: A zero-balance hotel bill with itemized charges and the amount of your payment is required. "Express" statements cannot be accepted as a receipt, per IRS rules, because this version lacks a confirmed payment record. Most hotels will quickly provide a copy of the final statement by email or fax, upon request. If you are requesting reimbursement for a hotel cancellation penalty, include a receipt and an explanation of the business necessity for this charge.

Totals

Total Expenses: The formula in this cell automatically calculates the total of all values entered in the boxes above, with the exception of the CTS Airfare column. Any value reported in the "Trip Advance Amount" is deducted from the amount of total expenses. Currently, only Berkeley Law moot court competitors are eligible to receive University travel cash advances.

Reimbursement Amount, If Different: This is the amount that will be paid to the traveler, regardless of the amount of total expenses.

Chartstrings: If the amount of the travel reimbursement will be distributed across more than three chartstrings, include this information on the attached documentation and leave this part of the form blank.

Traveler's Signature: The traveler's certification statement signature in this box is required by the IRS. Electronic signatures are no longer permitted by the University, so the traveler should sign a hardcopy version of the Travel Report Form.

Approver's Signature: This is the individual who has an official *Signature Authorization Form* on file with the Disbursements Office and is responsible for approving expenditures against the chartstring shown on the form. The traveler may not approve his/her own travel. If the traveler is the primary approver for the chartstring used, the secondary approver for the chartstring should sign here instead. Contact Elisabeth Remick (eremick@law.berkeley.edu) if you have any questions about the approver signature.

Forward your completed Travel Report Form and attachments to Business Services via the white courier box located in the stairwell behind the donor wall between the Library and the Registrar's Office, or via campus mail. Our address is # 7220, Business Services, 2850 Telegraph Avenue, Suite 500.

Updated 7/1/09

BerkeleyLaw
UNIVERSITY OF CALIFORNIA

TRAVEL REPORT FORM

Rev. 7/20/09

TRAVELER INFORMATION

Traveler's Name:	Employee/Student ID:	Vehicle License:	City of Residence:	Liability Insurance:	
				Yes	No

Required for mileage reimbursement (Vehicle License, City of Residence, Liability Insurance)

Address:	BFS Vendor ID (optional)

TRIP INFORMATION

Trip Purpose:

Trip Destination:	Date/time traveler left home/office:	Date/time traveler returned to home/office:

LOCATION EXPENSES - Transportation

CTS airfare	Traveler airfare	BART/Bus	Parking	Mileage	Rail/train	Rental Car	Shuttle	Taxi	Tolls	Other

For international travel only - select the preferred option:

- ☐ Itemize all expenses
- ☐ Itemize lodging with per diem for meals/incidentals
- ☐ Itemize meals/incidentals with per diem for lodging
- ☐ Per diem for both lodging and meals/incidentals

LOCATION EXPENSES - Miscellaneous

Copying	Fax Computer	Phone	Store Luggage	Meeting Rm Fee	A/V or Equip Fee	Laundry	Passport Visa Fees	Other Int'l Travel Fees	Reg Fee	Other

Form prepared by (name and phone/email):

DAILY EXPENSES

Trip Dates																	
Breakfast																	
Lunch																	
Dinner																	
Incidentals (tips)																	
Lodging																	

TOTALS

Total Expenses	Trip Advance Amount	ADV #	Reimbursement amount, if different than total expenses:
$0.00			

BU	Account	Fund	Org	Program	Project	Flex	Amount
1							
1							
1							

Chartstring Approver's Signature:

Name of Student Journal *(only if appropriate for this report, use full name or acronym)*:

I certify that the above is true statement, that the expenses claimed were incurred by me on official University business on the dates shown, and that I have attached original receipts for each expense of $75.00 or more, as required by University policy.

Traveler's Signature:

Note: Traveler and Approver cannot be the same person, per University policy. See form instructions for more information.

JOE CHRISTENSEN PRINTING, INC.

All Berkeley Law student journals are printed by Joe Christensen Printing, Inc., located in Nebraska (two hours ahead of PST). Customer Service Representative **Mary Carlson** has extensive experience with our journals and is an invaluable resource throughout the production process. Mary ensures that article files are submitted correctly, that all required forms are in place, and that a print order has been received for the journal issue. Mary can answer your printing-related questions, such as:

- How the process was handled in the past (continuity)
- How and in what format journal files should be submitted
- How to minimize the cost of contract proof corrections

University purchase orders, representing our "promise to pay" this vendor for printing services, are established at the beginning of the academic year by the Publications Coordinator on behalf of each student journal.

Joe Christensen Printing, Inc.
1540 Adams Street
Lincoln, NE 68521
800-228-5030
402-476-3094 (fax)
http://jci.mightydrake.com/public/index.htm

Mary Carlson, Customer Service Representative.. *carlsonm@christensen.com*
Order Desk, for submission of PDFs... *order.desk@christensen.com*
Sue Hubbard, technical support for macros .... *hubbards@christensen.com*
Julia Schroeder, submits final Word docs to Westlaw/Lexis .... *schroedj@christensen.com*

JOURNAL PRODUCTION CHECKLIST

The journal production process is summarized in a handy checklist (Appendix 3.1) available on the student journals website: **Berkeley Law home page ➢ For Students ➢ Student Journals ➢ Forms Library**.

AUTHOR COPYRIGHT AGREEMENTS

An author owns the copyright to his/her journal article. In order to be published in a Berkeley Law journal, therefore, the author must either:

- **Transfer the copyright** to the Regents of the University of California (Author Assignment Agreement)
- **Grant a non-exclusive license** to the UC Regents to print the article (Author Licensing Agreement)

There are three types of copyright agreements:

1. Author Assignment Agreement
2. Author Licensing Agreement
3. Online Companion Author Licensing Agreement

Author Assignment Agreement

In an **Author Assignment Agreement** (Appendix 3.2), the author assigns (transfers) the copyright of his/her article to the UC Regents (not to the individual journal). This is the default agreement used in most situations, with the exception of the *Berkeley Technology Law Journal* and online companion publications, unless the author specifically requests to retain his/her copyright. With an Author Assignment Agreement, the Publications Coordinator facilitates:

- Registration of the copyright with the Library of Congress on behalf of the author
- Processing reprint permission requests on behalf of the author
- Posting the article on Lexis, HeinOnline, and Westlaw databases

Because the *California Law Review* is a separate, non-profit entity, the copyright for all articles published in this journal is held by the California Law Review, Inc.

The Author Assignment Agreement has been redesigned as a unilateral agreement to streamline the process and grant journal editors more control over the publication process. This agreement template contains some editable fields which will allow the journal to add author/article information; otherwise, the template text is locked to prevent any modifications to the agreement text. As long as the author makes no changes to the agreement terms, University signatures are no longer required on the form.

If an author requests any changes to the unilateral agreement, contact the Publications Coordinator immediately. Depending on the nature and extent of the requested changes, the revised agreement may need to be approved and executed by the campus Business Contracts Office, which could delay the process by several weeks.

Author Licensing Agreement

In an **Author Licensing Agreement** (Appendix 3.4), the author retains the copyright to his/her article and licenses its use to the UC Regents. Licensing agreements must be executed on behalf of the UC Regents by the campus Business Contracts Office prior to obtaining the author's counter signature. The Publications Coordinator facilitates this process on behalf of the journals. All *Berkeley Technology Law Journal* authors use a licensing agreement. The licensing agreement is also used in these situations:

- A journal plans on recording and then **publishing a transcript** of a speech
- The author specifically asks to retain the copyright

If the author retains the copyright to his/her article, he/she must register the article directly with the Library of Congress and the journal must indicate this in the dagger footnote on the first page of the article, "Copyright © 20XX held by (author's name)."

Because licensing agreements typically take two or more weeks for the Business Contracts Office to execute, journals are encouraged to provide authors with a sample of the appropriate copyright agreement at the time an article is accepted for publication. This will allow ample time to address any requested changes to or potential problems with the agreement well before the issue is ready to be printed.

Online Companion Author Licensing Agreement

The **Online Companion Author Licensing Agreement** (Appendix 3.5) is used for articles published in the *Ecology Law Currents* and *The Publicist* online journals. Online companion articles are not available in print format so this version of the copyright agreement eliminates the offer of free offprints and journal issues for authors.

One of these three agreement types must be in place for each author before a journal issue can be published. If there are two or more authors of an article, each co-author must complete an agreement. The Publications Coordinator will need to know the name of the primary (first) author.

Copyright Agreement Process

The copyright agreement process should be started as soon as an article has been accepted for publication:

Step 1: Determine which of the two copyright agreements should be used.

The Author Assignment Agreement is the default for most authors. The Author Licensing Agreement is the default for the *Berkeley Technology Law Journal* and authors specifically requesting to retain the copyright. The Online Companion Author Licensing Agreement is the default for online-only journals.

Step 2: Author Assignment Agreement will be used.

a) Send a table of contents that lists the authors and article titles, with or without page numbers, to the Publications Coordinator as a Word document attached to e-mail.

b) Use the new unilateral Author Assignment Agreement template.

c) Fill in the appropriate fields to customize the agreement for each author - these fields are identified on the template in **BOLD CAPS**:

- In the leading paragraph, add the author's name, article title, and journal name.
- In the 4th paragraph, add the journal name, volume and issue numbers, and year of publication.
- On Page 2 of the agreement, add the journal name, mailing address using the appropriate format, and the journal's or Publication Coordinator's fax number. (You may save the Page 2 changes on the original template as a time-saver for future agreements.)

d) Include the required text (see Appendix 3.3) in your e-mail/cover letter accompanying the agreement and e-mail the agreement to the author.

e) Follow up with authors to confirm that agreements have been signed and returned. Authors may fax, scan and e-mail, or mail the counter signed agreements to the journal using the appropriate journal address format.

f) Forward all signed agreements to the Publications Coordinator.

Step 3: Author Licensing Agreement will be used.

a) Send a table of contents that lists the authors and article titles, with or without page numbers, to the Publications Coordinator as a Word document attached to e-mail.

b) Use the Author Licensing Agreement template to create a customized agreement for each author. Fields are identified on the template in **BOLD CAPS**. Save each agreement as a separate electronic file.

c) E-mail the agreement files to the Publications Coordinator for execution by the Business Contracts Office. The best practice is to forward all agreements for an issue at the same time, each agreement as a separate attachment to the e-mail message.
d) Photocopy each executed agreement before distributing them to the appropriate authors.
e) Mail original executed agreements to the appropriate authors for counter signatures.
f) Follow up with authors to confirm that agreements have been signed and returned. Authors may fax, scan and e-mail, or mail the counter signed agreements to the journal using the appropriate journal address format.
g) Forward all signed agreements to the Publications Coordinator.

Step 4: Online Companion Author Licensing Agreement will be used.

a) Use the Online Companion Author Licensing Agreement template to create a customized agreement for each author. Fields are identified on the template in **BOLD CAPS**. Save each agreement as a separate electronic file.
b) E-mail the agreement files to the Publications Coordinator for execution by the Business Contracts Office. The best practice is to forward all agreements for an issue at the same time, each agreement as a separate attachment to the e-mail message.
c) Photocopy each executed agreement before distributing them to the appropriate authors.
d) Mail original executed agreements to the appropriate authors for counter signatures.
e) Follow up with authors to confirm that agreements have been signed and returned. Authors may fax, scan and e-mail, or mail the counter signed agreements to the journal using the appropriate journal address format.
f) Forward all signed agreements to the Publications Coordinator.

Author's Indemnification Clause

While simple changes to agreements, such as eliminating fees for reprint permission requests, and other revisions can be negotiated, **no changes can be made to the author's indemnification clause** in either agreement template. As explained by the campus Business Contracts Office, "indemnification means that one party agrees to protect the other party from financial loss that might arise out of the agreement, based on a claim or demand by someone who isn't part of the agreement (a third party)."

For journals, one of the author's warranties is that his/her article doesn't infringe another party's copyright. The University didn't write the article (an act not under the control of the University) and, therefore, does not want to assume financial liability for defending an allegation of copyright infringement. The author's indemnification clause mitigates this financial risk for the University.

OFFPRINT ORDERS

Offprints, also known as "reprints," are individually bound publications of a single article included in a journal issue. Since authors do not receive financial remuneration, journals typically provide each author with **(25) complimentary offprints of each article** and **(2) complimentary issues** of the journal in which the article has been published.

- Offprint order forms are specific to each journal – forms are available on the student journals website: **Berkeley Law home page ➢ For Students ➢ Student Journals ➢ Forms Library.**

- Offprint orders must be received before the journal issue is printed. Offprints requests processed after a journal has been printed are extremely expensive.
- If a journal decides to offer fewer than (25) complimentary offprints to each author, the printer will still charge the minimum quantity of (25) offprints per article in the journal issue, as stipulated in the University purchase order with this vendor.
- Offprint order forms must be submitted for each issue, even if authors are not ordering additional offprints.

Offprint costs are based on the page length of the article and the number of offprints requested. As soon as the page count has been determined, the journal should e-mail the offprint order form to the author with the page count for his/her article. Offprint order forms are journal specific, so make sure you are using the form that corresponds to your journal.

Authors may order up to an additional (225) offprints at their own expense. Payment by credit card is processed via a third-party payment acceptance website and instructions are provided on the offprint order form. Orders for more than (250) offprints (25 complimentary, 225 additional) must be produced on a larger press than that used by the vendor to produce standard quantities, which significantly increases the author's cost per page. Authors interested in purchasing more than (250) offprints may request a separate price quotation via e-mail to the Publications Coordinator.

Only one offprint order should be submitted for articles with co-authors. The primary, or first, author should complete the offprint order which includes offprints for co-authors. The order will be shipped to the primary author who is responsible for distributing offprints to co-authors. **Offprint order forms must be submitted for each article, even if authors are not ordering additional offprints, since this form provides contact and shipping information needed to process the complimentary offprints.**

Offprints are produced after the journal issue has been printed and are shipped to the authors via UPS ground. Authors should expect to receive offprints approximately two weeks after the issue in which the article appears has been printed. If an author reports that offprints have not been received within three weeks, the journal should notify the Publications Coordinator who will work with the printer to track the shipment.

A sample offprint order has been included in this handbook (Appendix 3.6).

JOURNAL PRINTING

Print Orders

A "print order" is a document that describes the specifications and printing instructions for a journal issue. This order is created and submitted to the printer by the Publications Coordinator. A print order includes:

- How many copies of an issue to print
- Where to send the contract proof of an issue for editor review
- Mailing instructions for issue distribution
- Author offprint order information and shipping addresses
- Information about special inserts or label carriers for the issue

Print orders must be submitted to Joe Christensen, Inc. by the Publications Coordinator before any action can be taken on your submitted article files. Files submitted without a print order will sit in the vendor's order queue until the required print order has been received. A sample print order is included in this handbook (Appendix 3.7).

To prepare a print order, the Publications Coordinator will need this information about your issue a **no less than one full week** before you plan to submit your files to the printer:

- Table of contents (list of all authors and article titles, with or without page numbers)
- Author copyright agreements (one for each author included in the issue)
- Offprint order forms (one per article)
- Any special instructions for the issue (increased quantity, special inserts, etc.)

Authors will often send their agreements and offprint orders to the Publications Coordinator, not to the journal editorial office. Therefore, **it is important for editors to stay in frequent contact via e-mail with the Publications Coordinator** to confirm that every detail is in place for your issue, including the required print order, by the time you are ready to submit your article files to the printer.

Printing Process

Once the offprint order forms and author copyright agreements have been received, you should notify the Publications Coordinator that article files are *almost ready* for submission to the printer.

Article files should be reviewed to confirm that these required elements are accurate:

- "© Regents of the University of California" has been properly cited.
- Running heads are accurate and consistent.
- Volume and issue numbers and date are accurate and consistent on the journal cover, spine, table of contents, masthead, and reprint covers.
- Article titles and author names are accurate and consistent on the journal cover, table of contents, articles, and reprint covers.
- The issue's beginning page number is correct.
- ***Strongly recommended:*** Print the PDF and review the content carefully and thoroughly to identify and correct any editorial errors before submission.

Submission of article files by the editor must take place in tandem with the submission of the print order by the Publications Coordinator. The printer cannot take action on journal files without this form.

Article files are submitted as PDF attachments to an e-mail message sent directly to the printer's Order Desk, *order.desk@christensen.com*, and to your Customer Service Representative, Mary Carlson, *carlsonm@christensen.com*. Your message must also include the **Order of Materials form** indicating the order of articles and front matter for the issue (Attachment 3.8). In lieu of this form, you may include any other document that provides the same information.

You should receive an auto-reply from the printer confirming receipt of your files; if you do not receive this reply within two hours, verify that you used the correct e-mail addresses. If necessary, resend the files.

Once all of the required information has been successfully transmitted to the printer, the first round of **contract proofs should be available in about five business days**. Contract proofs will be sent via UPS overnight service to the journal editorial office. Included with the proofs will be an **Error Memo** describing obvious formatting errors and inconsistencies in pagination, headers, footers, and spelling which the printer identified while processing your files.

The error memo is not a comprehensive review of your proofs, so it is imperative that the journal carefully and thoroughly review the proofs to identify and correct any other errors. Each round of corrections will incur a charge and generate another set of proofs. The journal should **return the error memo** to the printer indicating whether or not you accept the suggested edits, and noting any additional corrections that will need to be made to the contract proofs. The Publications Coordinator will provide the printer with the journal subscription mailing lists and an Address Verification Form on behalf of the journal.

The journal has two options for submitting corrections to the printer. Contact Mary Carlson with your questions about which option is the most effective in your particular situation:

1. Submit a **single page** of the file, if the corrections are limited to only one or two pages, at a cost of $5 per page.
2. Resubmit the **entire file**, if the corrections affect the entire article, at a cost of $1 per contiguous page ($1 times the entire article page count).

Once all of the corrections have been made and the journal has accepted the final contract proof, **an approval to print** will need to be conveyed to the printer. At the bottom of the form entitled, "This Package Contains Your Contract Proof Pages," indicate your approval to print by marking the box, "No Corrections Needed: Issue is Approved to Print." Sign and date the form and either fax or scan/e-mail it to both Mary Carlson and the Order Desk. Mary will contact the journal in a day or two with the scheduled print date and the ship date of the advance copies of the issue.

Issues will be mailed to subscribers after advance issues have been sent to the journal. The remainder of the issues requested by the journal will be shipped via UPS ground service to arrive in about a week. The printing process concludes with shipment of offprints to the authors about two weeks after the issue has been published.

Errors Found After Issue Publication

Occasionally, errors are discovered after an issue has been printed. These include footnote problems, incorrectly cited works, and dropped text. Typically, it is the author who brings these errors to the journal's attention.

If the **error was the fault of the journal** - not having edited an article appropriately or not having correctly incorporated an author's revisions, for example - then the cost to reprint the author's entire offprint order will be paid by the journal. The Publications Coordinator should be contacted immediately for assistance with the reprint request. The journal will need to revise the original Word document and confirm with the author that the revisions are correct. The edited Word file and article PDF must be forwarded to the Publications Coordinator, along with a detailed description of what the errors were and on what pages they occurred. If any of the edits affected pagination, this must also be brought to attention of the Publications Coordinator.

The journal will submit the corrected PDF to the printer, copying the Publications Coordinator on the e-mail message. It typically takes two to three weeks for the reprinted offprints to be produced and shipped to the author. The Publications Coordinator will ensure that the corrected file is submitted to online vendors, Lexis, HeinOnline, and Westlaw.

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JOURNAL PRODUCTION CHECKLIST

<table>
<tr><th>Step 1</th><th>Once articles have been slated for an issue:</th><th>✓ When Done</th></tr>
<tr><td>Actions:</td><td>• Create a list of article titles and authors (with or without page numbers) and attach the Word file to an email message for the Publications Coordinator and send to Journalpublications@law.berkeley.edu.
• If any articles/authors are added, cut, or moved to a later issue, convey this information to the Publications Coordinator as soon as possible.</td><td></td></tr>
<tr><th>Step 2</th><th>As soon as an article has been selected for publication:</th><th>✓ When Done</th></tr>
<tr><td>Actions:</td><td>• Begin the Author Copyright Agreement Process by determining which agreement template is appropriate for each author:
• For each author, create one agreement from the appropriate template:
✓ Author Assignment Agreements are now unilateral, and may be emailed directly to the author.
✓ Author Licensing Agreements must first be sent to the Publications Coordinator for execution by the campus Business Contracts Office before agreements are forwarded to authors.
✓ Online Companion Author Licensing Agreement must first be sent to the Publications Coordinator for execution by the campus Business Contracts Office before agreements are forwarded to authors.
Executed agreements are mandatory – no journal may be published until these documents are in place.</td><td></td></tr>
<tr><th>Step 3</th><th>Once an article has been edited and the macro applied, you should have an approximate page count:</th><th>✓ When Done</th></tr>
<tr><td>Actions:</td><td>• Distribute Offprint Order Forms to the individual or primary (first) author.
• Email the NEW (rev 7-09) Offprint Order Form to the author along with the article page count (one form per article - if more than one author, send to primary author who must place order for all co-authors)
• Authors must return the form even if not ordering more than the (25) complimentary offprints, and form must include author's shipping address and contact phone number.</td><td></td></tr>
<tr><th>Step 4</th><th>A week or two prior to submitting files to the printer</th><th>✓ When Done</th></tr>
<tr><td>Actions:</td><td>• Contact the Publications Coordinator to confirm that the copyright agreements and offprint orders forms have been received for every article to be published in the upcoming issue.
• Inform the Publications Coordinator of any special instructions for the issue, such as increase in print quantity or special inserts, so the Print Order can be completed.</td><td></td></tr>
<tr><th>Step 5</th><th>Your editing production work is complete:</th><th>✓ When Done</th></tr>
<tr><td>Actions:</td><td>• Print and carefully proofread your article PDFs - identify and correct errors and inconsistencies (format, page numbers, author name spelling, running heads, etc). You will be charged by the printer for any additional corrections after your files have been submitted.</td><td></td></tr>
</table>

Step 6	**Files are ready to be submitted to the printer:**	✓ When Done
Actions:	• **Inform the Coordinator that you are ready to submit files.** This gives the Publications Coordinator adequate time to prepare and submit the required Print Order. • **Email your files** to BOTH Mary Carlson and the Order Desk only after you have informed the Publications Coordinator: ✓ PDFs of each article ✓ Order of Materials Form ✓ Any files the printer must format, such as the front matter or membership list	
Step 7	**Five days after files have been submitted:**	**✓ When Done**
Actions:	• **Review contract proofs carefully and thoroughly** as soon as they have been received from the printer via UPS overnight to the journal in approximately five working days. These proofs show exactly how the pages will appear in the journal. • **Review and take action on the Error Memo** included with proofs - this lists any *obvious* formatting, pagination, and footnote inconsistencies noticed by the printer while processing your files. The Error memo does not replace Step 5 and is not a comprehensive review of your files. • The Publications Coordinator will forward directly to the printer the subscription mailing label files and address verification form.	
Step 8	**The files have been edited and the issue is ready to go to press:**	**✓ When Done**
Actions:	• **Provide the Authorization to Print** to the printer (included with your contract proofs). The printer will schedule an issue print date after this form has been received. • **After an issue has been printed,** advance copies will be shipped to the journal, issues will be mailed to subscribers, and author offprints will be produces and shipped. • **Submit final Word files** to the printer via email to Julia Schroeder *(schroedj@christensen.com)*. Julia will upload the files to **Lexis and Westlaw.**	
	The print process is now complete.	

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ii (first left hand page)				
iii				
iv				
v				
vi				
vii				
viii				
ix				
x				

ARTICLES - Page numbers to begin with page number ________

Articles	Author Name	Complete	Pre-press by JCI Required
1			
2			
3			
4			
5			
6			
7			
8			
9			
0			

BACK PAGES (please include pages that are to be blank)

Page	Type of back page (ie, ads, announcements, etc.)	JCI will format	Camera Ready	
			Repro.	Files
i (Next odd page)				
ii (Next page)				
iii (Next page)				
iv (Next page)				
v (Next page)				
vi (Next page)				

BACK COVERS

Inside Back Cover				
Outside Back Cover				

Date ____________________ Signed ________________________________

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August 26, 2009