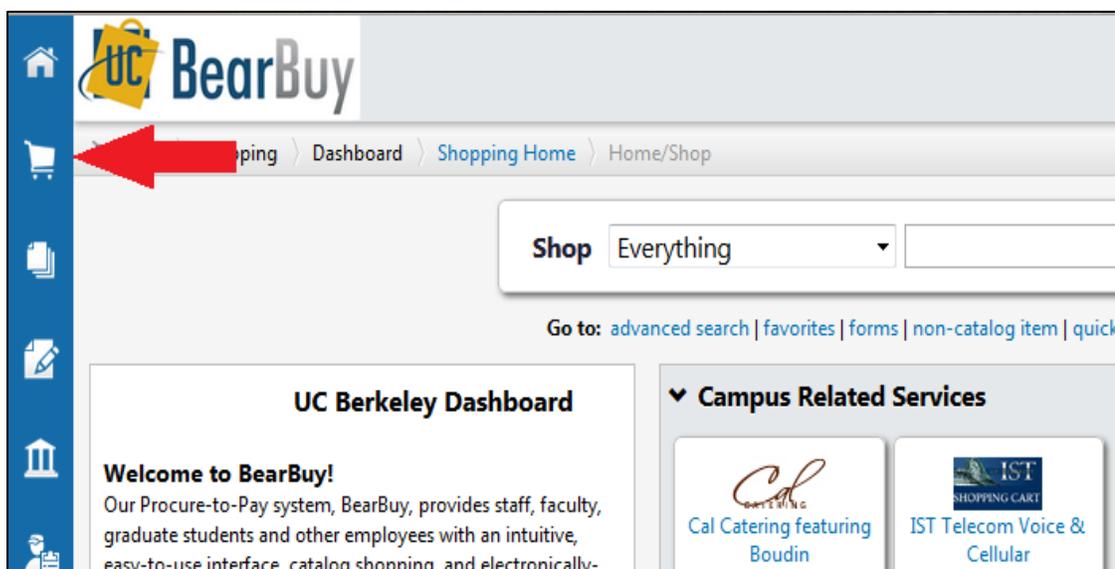


Preparing an After-The-Fact Payment in BearBuy

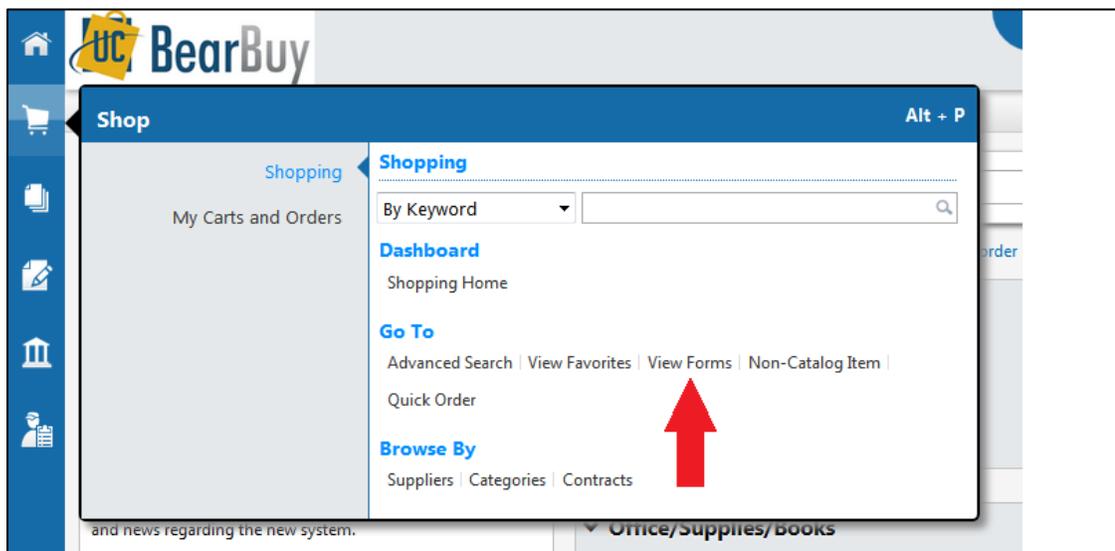
These instructions are intended to supplement other BearBuy job aids by providing how-to information specific to making an After-The-Fact payment to a vendor. UC Policy requires all such payments to be accompanied by a written justification and approved by a senior campus Buyer.

STEP 1 Open the After-The-Fact form

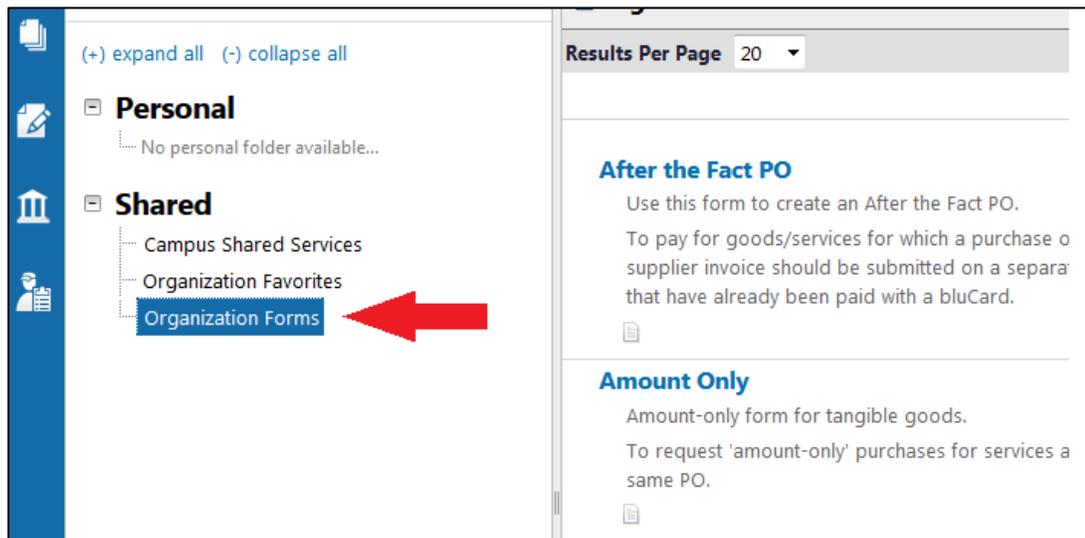
On the left side of the BearBuy homepage, hover over the 'shopping cart' icon to bring up the 'Shop' menu.



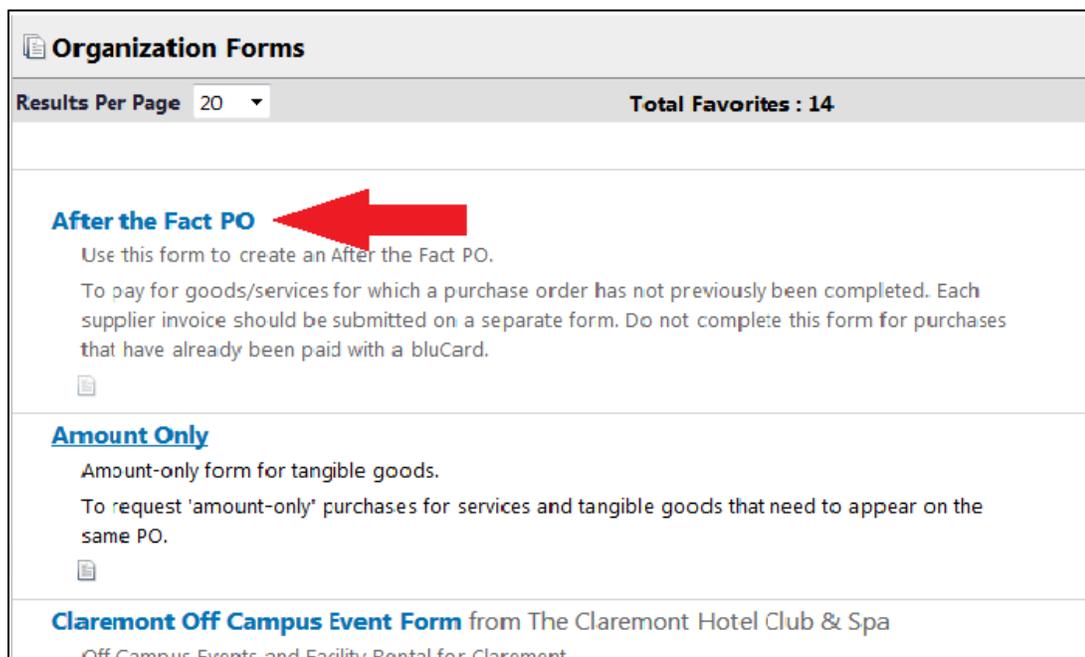
Under the section entitled 'Go To,' select 'View Forms.'



This will open the Forms catalog. On the left side of the screen, select 'Organization Forms.'



Select the 'After The Fact PO' form listed in the center of the screen. Click either the title or the 'View Form' button to open up the form in a pop-up window.



STEP 2 Enter Request Info into the form

Enter your vendor into the 'Enter Supplier' field. This field will auto-populate with suggested vendors based on your submission; select the appropriate vendor from the drop-down list that appears. Please note that if your vendor doesn't appear on the list, they will need to be set up in our financial system before they can be paid – see the Berkeley Law Business Services website for instructions on how to do so.

The screenshot shows a web form titled "Request Info" with a "Go" button and a "Close" button. The form is divided into several sections:

- Supplier Info**: Contains the "Enter Supplier" field, which is highlighted with a red arrow. Below it is a link for "supplier search".
- Contract:**: A label for the contract information.
- Justification**: A section for providing justification, including a large text area and a "500 characters remaining" indicator. There are "expand" and "clear" links.
- Invoice Number**: A text input field.
- Invoice Date**: A date input field with a calendar icon and the format "mm/dd/yyyy".

A yellow horizontal line is visible at the bottom of the form area.

Enter the After the Fact Justification. This should be a complete explanation of why no Purchase Order was set up for this expense in advance of the work being done. If you require more than 500 characters (all the form will allow) for your explanation, please enter 'see attached' and attach the explanation to the form (see step below for instructions on how to do this).

Available Actions: Add and go to Cart

Request Info ?

Supplier Info

Enter Supplier

or
[supplier search](#)

Contract:

Justification

After The Fact Justification 

500 characters remaining [expand](#) | [clear](#)

Invoice Number

Invoice Date

mm/dd/yyyy

Enter the Invoice Number and Invoice Date (mm/dd/yyyy).

Available Actions: Add and go to Cart

Request Info ?

Supplier Info

Enter Supplier

or
[supplier search](#)

Contract:

Justification

After The Fact Justification

500 characters remaining [expand](#) | [clear](#)

Invoice Number 

Invoice Date 

mm/dd/yyyy

Finish the Request Info section by uploading a copy of the invoice and (if necessary) extended justification in the 'Internal Attachments' section. Please note that it is a requirement that you attach an invoice to the After the Fact request.

Privacy Warning: Do not upload any document in BearBuy, or any other website application, *unless* the notice triggering data and the home & family data is blacked out and **completely unreadable**. The best approach is to remove this data from the document before uploading it. [\[Data Privacy\]](#)

Internal Attachments [Privacy Warning]



STEP 3 Enter Items Purchased After The Fact into the form

In the field entitled 'Description,' enter a simple description of the items or services purchased; this is the description that will appear on your group's ledger and should be no more than 20 characters in length. While there are two boxes on the form, you may enter all of your information in a single box.

Items Purchased After The Fact (ATF) ?		
Description	Unit Price	Quantity
<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>
<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>
Items Purchased After The Fact (ATF) Total:		0.00



Enter the Unit Price and Quantity. The Unit Price should be the total dollar value of your invoice (no dollar sign necessary) and the Quantity should be 1.

Items Purchased After The Fact (ATF) ?		
Description	Unit Price	Quantity
<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>
<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>
Items Purchased After The Fact (ATF) Total:		0.00



Ensure that the total amount listed at the bottom of the form matches the amount on your invoice.

<p>ized</p> <p>vendor</p> <p>ornia</p> <p>ations</p> <p>he</p> <p>nt has</p> <p>he</p> <p>. Any</p> <p>ement is</p> <p>ds.</p> <p>ge of</p> <p>Bus 43,</p> <p>cked for</p>	<table border="1"> <thead> <tr> <th>Description</th> <th>Unit Price</th> <th>Quantity</th> </tr> </thead> <tbody> <tr> <td><input type="text"/> 254 characters remaining expand clear</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/> 254 characters remaining expand clear</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td colspan="2">Items Purchased After The Fact (ATF) Total:</td> <td>0.00</td> </tr> </tbody> </table>	Description	Unit Price	Quantity	<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>	<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>	Items Purchased After The Fact (ATF) Total:		0.00
Description	Unit Price	Quantity											
<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>											
<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>											
Items Purchased After The Fact (ATF) Total:		0.00											
	Total 0.00												



STEP 4 Finalize form

After reviewing the form for accuracy, scroll to the top of the form and select 'Add and go to Cart' from the Available Actions menu and hit the blue 'Go' button. This will close the pop-up window and add the form to your shopping cart.

The screenshot shows a web form titled "Request Info" with a header bar containing "Available Actions: Add and go to Cart" and buttons for "Go" and "Close". A red arrow points to the "Go" button. The form fields include:

- Supplier Info**
 - Enter Supplier**: A text input field.
 - or [supplier search](#)
- Contract:**
- Justification**
 - After The Fact Justification**: A large text area with a "500 characters remaining" indicator and "expand | clear" links.
- Invoice Number**: A text input field.
- Invoice Date**: A date picker with a calendar icon and the format "mm/dd/yyyy".

From this point forward, the shopping cart is filled out in a similar manner to all other BearBuy purchases. If and when the payment is approved by a senior campus Buyer, the invoice will automatically enter the voucher stage; there's no need to send it separately. Please note that our partners at CSS or our Senior Buyer may have additional questions or documentation requirements before processing the payment.

