Submitting a Travel or Entertainment Reimbursement in BearBuy

These instructions are intended to supplement other BearBuy job aids by providing how-to information specific to requesting a Travel or Entertainment Reimbursement. Ensure you have a scanned, fully signed hardcopy TRV/ENT form, including receipts, before beginning this process.

STEP 1 Open the CSS Non-Purchase Request 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 ‘Campus Shared Services.’

Select the ‘Campus Shared Services’ 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 the Traveler or Host’s full name in the ‘Traveler or Host Name’ field. If you have contact information for the person you are trying to reimburse, and would like Campus Shared Services to contact them directly with any questions, enter that information in the ‘Traveler or Host: Contact Email and Phone’ field.

Enter your contact information in the ‘Department Contact Name’ and ‘Email and Phone’ fields. If you won’t be available to answer any questions about the reimbursements that may arise, please enter the contact information of an employee who will be available.
From the drop-down menu, select the type of reimbursement: Travel or Entertainment Reimbursement. The third option, ‘Recharge,’ isn’t used by Berkeley Law at this time.

**STEP 3  Enter Expense Information into the form**

In the field entitled ‘Expense Information,’ enter a short, meaningful description of the Travel or Entertainment that took place. This can be copied from ‘Business Purpose’ or ‘Trip Purpose’ section of your Travel / Entertainment form. The ‘Estimated Amount’ field should be left at ‘1.00’ – there’s no need to enter the actual amount of the reimbursement.
STEP 4  Add Attachments to the form

Ensure that your hardcopy Travel or Entertainment form is fully completed (all the expense information is entered on the form, both the Host/Traveler and the Charstring Approver have physically signed the form, and the receipts are attached) and that your scanned copy of the report is legible. Upload the scanned file to the form using the ‘Add Attachments’ button.
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.

Unlike other BearBuy shopping cars, it is **not necessary** to enter chartstring information or assign the cart to a cart authorizer at this point. You may simply hit ‘Submit’ once the CSS Non-Purchase Request has been successfully added to the cart.