

## **Forms Matrix Job Aid**

Transaction Type	Form Name
After the Fact Purchase	After the Fact Form
Ammunition and Firearms	Non-Catalog Form
Catering, No contract required, Payment only	Payment Request Form
Catering, Order and Contract required	Service Order Request
Cell Phones, Purchase	Non-Catalog Form
Computer Software, Enterprise and Security	Non-Catalog Form
Computer Software, Hosting and Cloud Services	Non-Catalog Form
Conference and Event Rentals	Off Campus Events & Facility Rental
Conference Registration Fees*	Payment Request Form
*bluCard preferred  Copier Leases	Amount Only Form
Donations & Contributions	Payment Request Form
Entertainment, Food	Service Order Request
Entertainment, Other Goods	Non-Catalog Form
Entertainment, Services	Service Order Request
Equipment, Laboratory (non-contracted)	Non-Catalog Form
Equipment, Maintenance	Service Order Request
Equipment, Other	Non-Catalog Form
Equipment, Sole Source Over \$100,000	Sole Source Over
	\$100,000 Form
Explosives	Non-Catalog Form
Express Delivery Services	Payment Request Form
Freight	Payment Request Form
Furniture, Office (non-contracted)	Non-Catalog Form
Gases, Toxic	Non-Catalog Form
Gifts, Goods	Non-Catalog Form
Government Fees	Payment Request Form
Graphic Designer	Independent Contractor
	and Consultant Services
Honoraria (non UCB Employee or Student)	Payment Request Form

Transaction Type	Form Name
Human Subject Fees, No Cash Funds	Payment Request Form
Journals/Subscriptions*	Payment Request Form
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*bluCard preferred	Amount Only Form
Leases, Operating Loan Repayment Assistance	Amount Only Form Payment Request Form
Maintenance and Repair Services (non-facilities)	Service Order Request
Memberships*	Payment Request Form
Weinbersinps	rayment Nequest Form
*bluCard preferred	
Miscellaneous Goods	Non-Catalog Form
Moving Services for new campus hires**	Moving Services:
** Limited to strategically sourced Suppliers ONLY. See	Household and
form for available Suppliers.	Personal Effects
Multi-Location Appointment (outside Payroll)	Service Order Request
New Employee Moving Expense Reimbursement	Payment Request Form
Off-Campus Facility Rental for Entertainment &	Off Campus Events &
Travel	Facility Rental
Participant Support Stipend	Payment Request Form
Pay for goods/services for which a purchase	After the Fact Form
order has not previously been completed.	
Payment Request	Payment Request Form
Personal/professional/independent contractor	Independent
or consulting services	Contractor and
	Consultant Services
Petty Cash	Payment Request Form
Printing Services, Design and Layout Services	Independent
only	Contractor and
	Consultant Services
Printing Services, Printing (taxable)	Amount Only Form
Printing Services, Printing and Mailing Services	Service Order Request
(non-taxable)	
Professional Services (business, engineering,	Independent
medical, etc.)	Contractor and
	Consultant Services

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## **Forms Matrix Job Aid**

Purchase Type	BearBuy Form Type
Refunds	Payment Request Form
Reimbursement of non-travel, non- entertainment expenses (employees & students)	Payment Request Form
Royalties	Payment Request Form
Service Contracts (non-facilities)	Service Order Request
Sole Source Over \$100,000 Form	Sole Source Over \$100,000 Form
Sports Officials Fees	Payment Request Form
Subaward - UC Recipient	Subaward - UC Recipient
Subaward- Non UC Recipient	Subaward- Non UC Recipient
Telephone/Data Services (Telephone/conferencing service bills from Suppliers such as AT&T, Verizon, Comcast)	Payment Request Form
Temporary staffing (Admin/Clerical, Food Services, IT Services, Light Industrial, or Trade)**  ** Limited to strategically sourced Suppliers ONLY. See form for available Suppliers.	Temporary Staffing Request Form
Travel, Advance	Payment Request Form
Utilities	Payment Request Form
Vehicle Acquisition	Non-Catalog Form
** Limited to strategically sourced Suppliers ONLY. See	Vehicle Charter Request
form for available Suppliers.  Visa Application Fees	Payment Request Form
Writer/Translator	Independent Contractor and Consultant Services

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