

Shopping - CA Partial Sales Tax Exemption Orders

Reminders!

Effective July 1, 2014 through June 30, 2022, the California State Board of Equalization (SBOE) is offering a [reduced sales/use tax rate on equipment purchased for research and development in biotechnology, physical engineering, and life sciences.](#)

To determine if a product qualifies for exemption, please visit the [Supply Chain Management - CA Partial Sales Tax Rate Exemption webpage](#). It is the Department's responsibility to ensure the product being purchased qualifies for partial sales tax exemption. If it is later determined that the purchase does not qualify for the sales tax exemption, the department will be responsible for the additional tax assessment, fines, and interest.

UC Berkeley permit number is SR-CH-21-135302

A [Partial Exemption Certificate for Manufacturing, Research and Development Equipment \(BOE-230-M\)](#) is required to be completed for every product and attached to every BearBuy cart.

All qualifying catalog and non-catalog products, with the exception of Sole Source orders, must be ordered on the **Non-Catalog** form.

Qualifying **Sole Source** orders must be placed on the Sole Source Over \$100K form and follow the same process and program requirements.

Users cannot mix qualifying and non-qualifying products on the same cart. The cart will not be accepted if submitted with both product types.

Tax related questions should be sent to Accounts Payable (disburse@berkeley.edu)

Contact the BearBuy Help Desk for all other questions (bearbuyhelp@berkeley.edu).

Completing the Partial Exemption Certificate for Manufacturing, Research and Development Equipment

1. Access the [Partial Exemption Certificate for Manufacturing, Research and Development Equipment](https://controller.berkeley.edu/sites/default/files/cdtfa-230-m-uc-berkeley.pdf) by going to: <https://controller.berkeley.edu/sites/default/files/cdtfa-230-m-uc-berkeley.pdf>

2. Enter **Supplier name** and **order/fulfillment address** in the **Seller/Lessor** name section. If you do not know the Seller address, you can leave the address section blank.

SELLER'S/LESSOR'S NAME
SELLER'S/LESSOR'S ADDRESS (street, city, state, zip code)

3. Identify how the product will be used by selecting the appropriate checkbox (*check only one*).

Is qualified tangible personal property and will be used by me primarily (please check one):

1. ☐ for manufacturing, processing, refining, fabricating, or recycling;
2. ☒ for research and development;
3. ☐ to maintain, repair, measure, or test any property being used for (1) or (2) above; or
4. ☐ as a special purpose building and/or foundation.

4. Enter a precise description of the product being purchased. If you require additional space, please attach a separate sheet.

Description of qualified tangible personal property purchased or leased ¹
Electrophysiology experimental mechanical rig. Includes SliceScope motorised microscope, 2 motorised 4 axis, super smooth PatchStar manipulators with sleep brackets, Motorised Movable Bottom Plate (MMBP) with 3 English threaded mounting carriages and short post & platform for mounting sample.

5. Read and review the purchaser section. Enter:
 - a. **University of California, Berkeley** as the Purchaser
 - b. The **Shopper's** name, title, address, and telephone number.
 - c. **SR-CH-21-135302** as UC Berkeley's **permit number** (reseller number)
 - d. **Date** the document was signed.

NAME OF PURCHASER University of California, Berkeley	SIGNATURE OF PURCHASER, PURCHASER'S EMPLOYEE, OR AUTHORIZED REPRESENTATIVE
PRINTED NAME OF PERSON SIGNING John Doe	TITLE Business System Analyst
ADDRESS OF PURCHASER 1995 University Avenue, Suite 325	TELEPHONE NUMBER (510) 664-0000
PERMIT NUMBER (if you are not required to hold a permit, explain why) 12345	DATE 05/01/2015
EMAIL ADDRESS OF PERSON SIGNING nobody@berkeley.edu	

6. **Print and sign the certificate.**

Placing Your Qualifying Order in BearBuy

1. Locate the **Non-Catalog Form** from the **Frequently Used Forms** section and:
 - a. Enter **Supplier Name**.
 - b. Enter appropriate **Expense Information** (Product description, qty, estimated unit price, etc).
 - c. Attach **quote/estimate** and **sales tax exemption certificate** as an **External Attachment**.

2. From the **Available Actions** drop-down menu, select **Add and go to Cart**, and press **Go**.

Available Actions: Add and go to Cart Go Close

3. Select the **Shopping Cart** icon on the top right banner. From there select **Checkout**.

Carla Prado ★ Action Items Notifications 7,000.00 USD

My Cart Partial Sales Tax Order - F...

Partial Sales tax purchase.
Quantity: 1
Price: 7,000.00 USD

View My Cart

Checkout

7,000.00 USD

4. Navigate to the **Buyer Info** section within **Requisition - Summary** and select **edit**.

Requisition Summary Shipping Billing Asset Management Accounting Codes Supplier Info Taxes/S&H

Additional Approvals

Buyer Info

Buyer Name	Buyer Email	Buyer Phone	Buyer Intervention Needed	CA Partial Sales Tax	Fabrication Number
no value	no value	no value	no value	no value	no value

5. Select the **CA Partial Sales Tax** checkbox and click **Save**.

Buyer Info

Buyer Name	Buyer Email	Buyer Phone	Buyer Intervention Needed	CA Partial Sales Tax
no value	no value	no value	no value	no value

Clear selected value... Clear selected value... Clear selected value... recalculate / validate values

Save Cancel

Buyer Info

Buyer Phone	Buyer Intervention Needed	CA Partial Sales Tax
no value	no value	no value

6. Continue to add the sales tax exemption certificate and/or additional comments, navigate to the **Comments** tab, and select **Add comment**.

Click the **browse** button to select the **partial sales tax exemption certificate**. Select the **Add Comment** button.

7. **Complete the shopping process:** Populate the remaining requisition fields (e.g. ship to, Org Node, etc) and when ready, **Assign** or **Submit** the cart. Instructions on completing a BearBuy requisition can be found on the [Supply Chain Management BearBuy Instructional Resources site](http://supplychain.berkeley.edu/bearbuy/instructional-resources-0) (<http://supplychain.berkeley.edu/bearbuy/instructional-resources-0>).