

## Reportable Gifts, Awards, and Prizes: Documentation Form

University Business Expense Policy dated October 2016

Use this form to document employee and non-employee gifts, awards, and prizes that are reportable to the Finance Office (Foster Building 229). This criteria is defined in Business Expense Policy dated January 2017, Section 6 and Section 7.

For cash gifts, this completed form should be attached to the Direct Pay Request form ("DPR"; available on the Procurement/Purchasing website) and submitted through the UMass BuyWays Purchasing.

For questions regarding this form, contact the Finance Office (**Lizette Silva**) at **lsilva2@umassd.edu** or (508) 999-8057.

### UMass Dartmouth Contact Information

College/Department \_\_\_\_\_

Contact Name \_\_\_\_\_

Contact Phone # \_\_\_\_\_

Event Name: \_\_\_\_\_

Event Date: \_\_\_\_\_

Business Purpose: \_\_\_\_\_

Recipient's Name: \_\_\_\_\_

Recipient's Address: \_\_\_\_\_

Recipient's UMass Dartmouth ID #: \_\_\_\_\_

Gift/Award Description: \_\_\_\_\_

Value of Gift/Award: \_\_\_\_\_

**Employee ID# must be listed here (not UMass ID#)**

Is recipient a US Citizen?? Yes \_\_\_\_\_ No \_\_\_\_\_

*As the departmental contact administering this gift/award/prize, I confirm that this documentation complies with University Business Expense Policy dated January 2017 and that the information stated above is accurate.*

Department Approver Signature \_\_\_\_\_

Date: \_\_\_\_\_

*As the gift or award recipient, I understand that this award or gift may be considered taxable income and reportable to me on Form W-2, Form 1099-MISC, or Form 1042-S.*

Gift/Award Recipient Signature: \_\_\_\_\_

Date: \_\_\_\_\_

<sup>1</sup> Recipient must be set up as a vendor. Vendor lists are in PeopleSoft/Vendors.

<sup>2</sup> For nonresident alien recipients, withholding and reporting compliance must be adhered to, and additional documentation is required (e.g., Foreign National Information Form). Contact the Tax Office to determine what documentation will be required.