Reportable Gifts, Awards, and Prizes: Documentation Form

University of Massachusetts Business and Travel Expense Policy dated December, 2021

Use this form to document employee and non-employee gifts, awards, and prizes that are reportable as defined in Business, Travel and Expense Policy dated December, 2021, Section 107 e.

For questions regarding this form, contact the Controller's Office at Controller.request@umassd.edu

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[2]? Yes _____ No _____

As the departmental contact administering this gift/award/prize, I confirm that this documentation complies with University of Massachusetts Business and Travel Expense Policy dated December 2021 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: _____

[1] Recipient must be set up as a vendor. Vendor lists are in PeopleSoft/Vendors.

[2] 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.