

UMW BUSINESS MEAL AND FOOD APPROVAL FORM



Instructions

UMW must ensure compliance with the Business Meal and Food Policy (including Allowed Meal Limits shown on page 2) and the Food Service Provider contract. To help navigate through this process, complete both pages of this Business Meal and Food Approval Form (BMF) starting with page 1. (Note: If you select the "Reset Form" button, both page 1 and page 2 of this form will reset.) In order to better ensure compliance for each situation, use a new form found at <http://adminfinance.umw.edu/ap/business-meals/>, each time a BMF is needed and READ the Business Meal regulations at this same site. Business meals and food NOT associated with overnight travel are allowable expenses when incurred under the guidelines listed within this form, including sections 1 - 4 on page 2.

*Except in cases of emergencies or unforeseen circumstances, advance approval of this form is required.
An explanation to document the unforeseen circumstance must be attached to this form.*

Reset Form

Do you plan to use the UMW Contracted Food Service Provider (Sodexo) or an Off Campus Vendor for this meal/event?

- UMW Contracted Food Service Provider (Sodexo) Off Campus Vendor/Provider

UMW is tax exempt for meals and food purchased in Virginia.

Therefore, if reimbursement is requested, UMW will NOT reimburse for taxes paid on food/meals purchased in Virginia.

Dining Location

Will you be dining on a UMW property (including Belmont, Gari Melcher's Museum, James Monroe Museum, etc.) or off campus?

- On a UMW Property Off Campus

Some area food establishments offer discounts to members of the UMW community. Please inquire with the establishment before placing your order.

Dining on a UMW Property

Are you purchasing from a grocery store, a restaurant, or is this a catered event (via off campus vendor)?

- Grocery Store Restaurant Catered Event Using Off Campus Caterer

A caterer is defined as an entity that delivers and serves food.

Is the TOTAL MEAL expense \$50 or less?

- Yes No

Grocery

The UMW Finance Card is the preferred method of payment. See [Business Meals](#) for procedures to use the UMW Finance Card. If using only state funds, the SPCC may be used.

Take the [Tax Exempt Form](#) with you.

Required Documentation:

1. Completed, signed, and dated Business Meal & Food Approval Form
2. A Detailed, Itemized Receipt

Contact [Procurement Services](#) for all Procurement Regulations that may apply to this purchase.

Continue to Page 2 to Complete the Business Meal and Food Approval Form

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1. The meal/food must be essential to conducting business of the University, involve substantive and bona fide business discussions, and be approved by the President or the President's Designated Signer for your department.

Business purpose for providing food/beverage and discussion topics:

TESS will provide updates to BUG members sharing University fiscal policies and responsibilities which impact SPCC card holders for State compliance.

2. Meal limits, WHICH INCLUDE TAXES AND TIPS (alcoholic beverages are NOT allowed), shall apply as shown below. A reasonable tip (defined as NO MORE THAN 20% of the "total bill," EXCLUDING alcohol) is allowed. ("Total bill" for tip calculation is defined as food, non-alcoholic drinks, and taxes on these items.) Gratuity can be rounded UP to the next whole dollar. Before leaving a tip, verify that it has not been automatically added.

Location	Allowed Meal Limits		
	Breakfast	Lunch	Dinner
Fredericksburg; Spotsylvania; Stafford; Prince William	\$11.00	✓\$12.00	\$23.00
Washington, DC; VA cities of Alexandria, Falls Church, Fairfax; VA counties of Arlington & Fairfax	\$16.00	\$17.00	\$31.00
Other Locations	Email payables@umw.edu or call 654-1226		

NOTE: Any meal amount (including taxes and tip) in excess of the stated limits is the responsibility of the payer. To calculate the "per person" amount, divide the total bill (INCLUDING taxes and tip) by the number of attendees. The state requires a DETAILED, ITEMIZED receipt to verify the number of attendees with the number of meals served and to verify no alcohol. The UMW Finance Card is the preferred method of payment. Reminder: The SPCC is NOT a UMW Finance Card and CANNOT be used to pay for restaurant meals.

3. A list of ALL persons, by name, involved in the meal/food consumption and the reason for the meal/food MUST be included on this form. If this meal/food/event is open to the campus or a specific group, identify the group name and include an approximate number. Meals for family members, significant others, etc. are not allowed.

Names of People Attending: BUG Members. List of attendees will be attached.

Grocery Smart attached.

4. A DETAILED, ITEMIZED RECEIPT MUST be provided.

I understand and accept these conditions and understand that the payer is responsible for any excesses or inappropriate expenditures.

Signature of person requesting the meal approval: *Uchepman* Date: 7/18

Business Meal/food Approved by:

Signature of President or Designated Signer: *Julie R. Smith* Date: 7/19/18

Do not approve for yourself. President's designees can be found at:
<http://adminfinance.umw.edu/ap/designees/>
 If your name is not on this list, do NOT sign here!

Date or Date Range for meal(s)/food: August 9, 2018

Activity and Location are optional fields. All other fields are REQUIRED.

Amount	Fund	ORG	Account	Program	Activity	Location	FOAPAL Manager's Signature
\$50.00	1111	302516	71264	10620	BUG		<i>Uchepman</i>
			71264				
\$50.00							

Use of the UMW Finance Card

(The UMW Finance Card is NOT an SPCC. Page 1 of this form explains which Card is allowed for meal/food purchases.)

Card Issuer Use Only

	Date	Time	Initials
Out			
In			

- I agree to not share the card number with anyone other than the vendor with whom I am doing business.
- I agree to the requirements listed in 1-4 above. In addition, if the Card has excesses or inappropriate expenditures during the time I had it signed out, I agree to allow UMW to follow Payroll regulations to withhold the funds from my paycheck if I refuse or fail to repay UMW for the inappropriate expense.

Signature of Card User _____ Print Name _____ Last 4 digits of Social Security Number _____ Date _____

*Signature is invalid unless signed in the presence of the issuer of the UMW Finance Card. The person who signs here is the person who picks up the card and is the ONLY person allowed to use the Card. You may be asked for identification.



Directory Listing

Certification Type

NIGP

NAICS

City

ZIP Code

AI Company Search

Match found 0

Sort by: Company name

Show entries: 5

Applied Filters

No matching record(s) found for the applied filters. Try again with different filter.

SWAM search for grocery 2018 NIGP code 39300
zip codes 22401,22402,22403,22404,22405,22406,22407,22408

COMMONWEALTH OF VIRGINIA
SALES AND USE TAX CERTIFICATE OF EXEMPTION

For use by the Commonwealth of Virginia, a political subdivision
of the Commonwealth of Virginia, or the United States

To: Costco Date: 08/08/2018
Name of Dealer
3102 Plank Rd #600 Fredericksburg VA 22407
Number and Street or Rural Route City, Town, or Post Office State ZIP Code

The Virginia Retail Sales and Use Tax Act provides that the Virginia sales and use tax shall not apply to tangible personal property for use or consumption by this State, any political subdivision of this State, or the United States. This exemption does not apply to sales or leases to privately owned financial and other privately owned corporations chartered by the United States.

The undersigned, for and on behalf of the governmental agency named below, hereby certifies that all tangible personal property purchased or leased from the above dealer on and after this date will be for use or consumption by a governmental agency, that each such purchase or lease will be supported by the required official purchase order, and that such tangible personal property will be paid for out of public funds. Check the appropriate box below.

- 1. Tangible personal property for use or consumption by the Commonwealth of Virginia, including prepared meals, catering, and other services related to the provision of food.
- 2. Tangible personal property for use or consumption by a political subdivision of the Commonwealth of Virginia, including prepared meals, catering, and other services related to the provision of food.
- 3. Tangible personal property and taxable services for use or consumption by the United States.

University of Mary Washington-Commonwealth of Virginia Agency 215
Name of Governmental Agency
1301 College Avenue Fredericksburg VA 22401
Number and Street or Rural Route City, Town, or Post Office State ZIP Code

I certify I am authorized to sign this Certificate of Exemption and that, to the best of my knowledge and belief, it is true and correct, made in good faith, pursuant to the Virginia Retail Sales and Use Tax Act.

By:  Vice President of Admin. & Finance
Signature Title

Information for dealer: A dealer is required to have on file only one Certificate of Exemption, properly executed by the governmental agency buying or leasing tax exempt tangible personal property under this Certificate.



Temporary Shopping Card

Valid Wednesday - August 08, 2018

"Photo-ID Required"

Business

Member Name:

Business Name: UMW

Member #: 111858985237

Resale #:

Sign-up Date: 08/01/2016

Authorization: Jasmine

INIT: 



Fredericksburg #340
3102 Plank Rd #600
Fredericksburg, VA 22407

8X Member 111858985237
E 343640 RPLCHIPS200Z 3.69 E
E 861611 CLUB CRKR 7.59 E
E 48757 ORG. SPR MIX 3.69 E
E 83333 GRN GRAPES 6.99 E
E 37719 CHICKEN SLD 13.67 E
E 37719 CHICKEN SLD 10.63 E
SALES TAX EXEMPTION
SUBTOTAL 46.26
TAX 1.16
TAX EXEMPT 1.16-
**** TOTAL 46.26

XXXXXXXXXXXXX CHIP Read
AID: A0000000980840 VERIFIED BY PIN
Seq# 13433 App#: 877077
EFT/Debit Resp: APPROVED
Tran ID#: 822000013433....
Merchant ID: 990340

APPROVED - Purchase
AMOUNT: \$46.26
08/08/2018 13:58 340 13 67 1

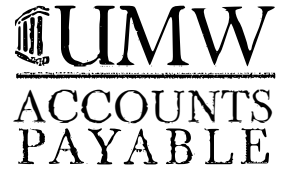
EFT/Debit 46.26
CHANGE 0.00

TOTAL TAX 0.00
TOTAL NUMBER OF ITEMS SOLD = 6

~~08/08/2018~~ 13:58 340 13 67 1
OP#: 1 Name: Leclia R.

Thank You!
Please Come Again
Whse:340 Trm:13 Trn:67 OP:1

REIMBURSEMENT REQUEST FORM



Use this form for reimbursement requests OTHER THAN travel expense reimbursement requests. Anyone seeking reimbursement from UMW is responsible for **following proper procurement guidelines**. (See the Procurement Services Department Section on this form.)

Reimbursement requests for any food item(s) must have a completed Business Meal and Food Approval Form (BMF) attached. The BMF and regulations can be found at <http://adminfinance.umw.edu/ap/business-meals/>. For travel expense reimbursement requests, use the Travel Expense Reimbursement Form that can be found at <http://adminfinance.umw.edu/ap/travel/travel-expense-reimbursement-form/>

Payee: Catherine Parrotte Date: 8/8/18

SSN: _____ Cardinal ID#: _____
 (Guests must provide full SS#; UMW employees & students should provide last 4 digits ONLY.) (Required ONLY for UMW students and guests)

Address: 348 Marlborough Point Road Requestor's
Stafford, VA 22554 Telephone #: (540) 273-0961

Reason for Purchase: Food for the August BUG Meeting. The Finance buyer tried to pay with the SPCC at point-of-sale but the transaction would not go through. Used a personal card for the purchase because of this.

Procurement Services Department Section

Personal Reimbursements for NON-travel items should always be a last resort. Please consult with your department buyer or the Procurement Services Department BEFORE spending personal funds. Requirements for a purchase may include use of a state or University contract, small business quote, and eVA entry. Use of the SPCC or UMW Finance Card is always the preferred method of payment, if possible. Circumventing Commonwealth procurement regulations may result in a denial of a reimbursement request. Ask your department buyer or the Procurement Services Department if you have questions.

This section is for the Procurement Services Department ONLY. Procurement Services Reviewer: _____
 Procurement Services Comment: _____ Date: _____

For non-employees, do you want to pick up this check? Yes No
 (Checks can be picked up at the Cashier's Office in Lee Hall.)
NOTE: Employee Reimbursements will be done electronically through direct deposit (EDI).

Activity and Location are optional fields. All other fields are REQUIRED.

Amount	Fund	Org	Account	Program	Activity	Location	FOAPAL Manager's Signature
\$46.26	1111	302516	71264	10620	REIM	BUG	
					REIM		
					REIM		
Total Amount to be paid (*Maximum amount of reimbursement is \$100. EXCEPTION: Business Meals.)							

Important Reimbursement Information

UMW employees will NOT be reimbursed for Virginia-based taxes for services or items, including taxes on food and meals. Taxes for lodging WILL be reimbursed. (Lodging reimbursements and travel-related reimbursements must be submitted on a Travel Reimbursement Request Form.) **Your reimbursement request CAN be denied by Accounts Payable or Procurement Services. Proper documentation must be attached. Procurement policies and procedures can be found on the Procurement Services website.**

I hereby certify that the expenses listed above were incurred by me and are necessary and appropriate expenditures for UMW. By my signature, I acknowledge that the goods purchased become the property of UMW and services provided were for UMW.

Payee's Signature Catherine Parrotte

Payee's Supervisor's Signature Sarah Carroll
 Printed Name Sarah Carroll

8/8/18
 Date

*Signature of President or Designee _____ Date _____
 (*Required ONLY for reimbursements over the maximum limit for reimbursement)

Send this completed form along with ORIGINAL, ITEMIZED, DETAILED RECEIPTS (contact Accounts Payable); small business quotes & CONTRACT NUMBER, where appropriate (contact Procurement Services); and any other required forms to the Accounts Payable Dept at Eagle Village, Suite 480.

This section is for the Accounts Payable Department ONLY. Accounts Payable
 Detailed, Itemized Receipt? Yes No Allowable Goods/Services? Yes No Compliant Non-Compliant