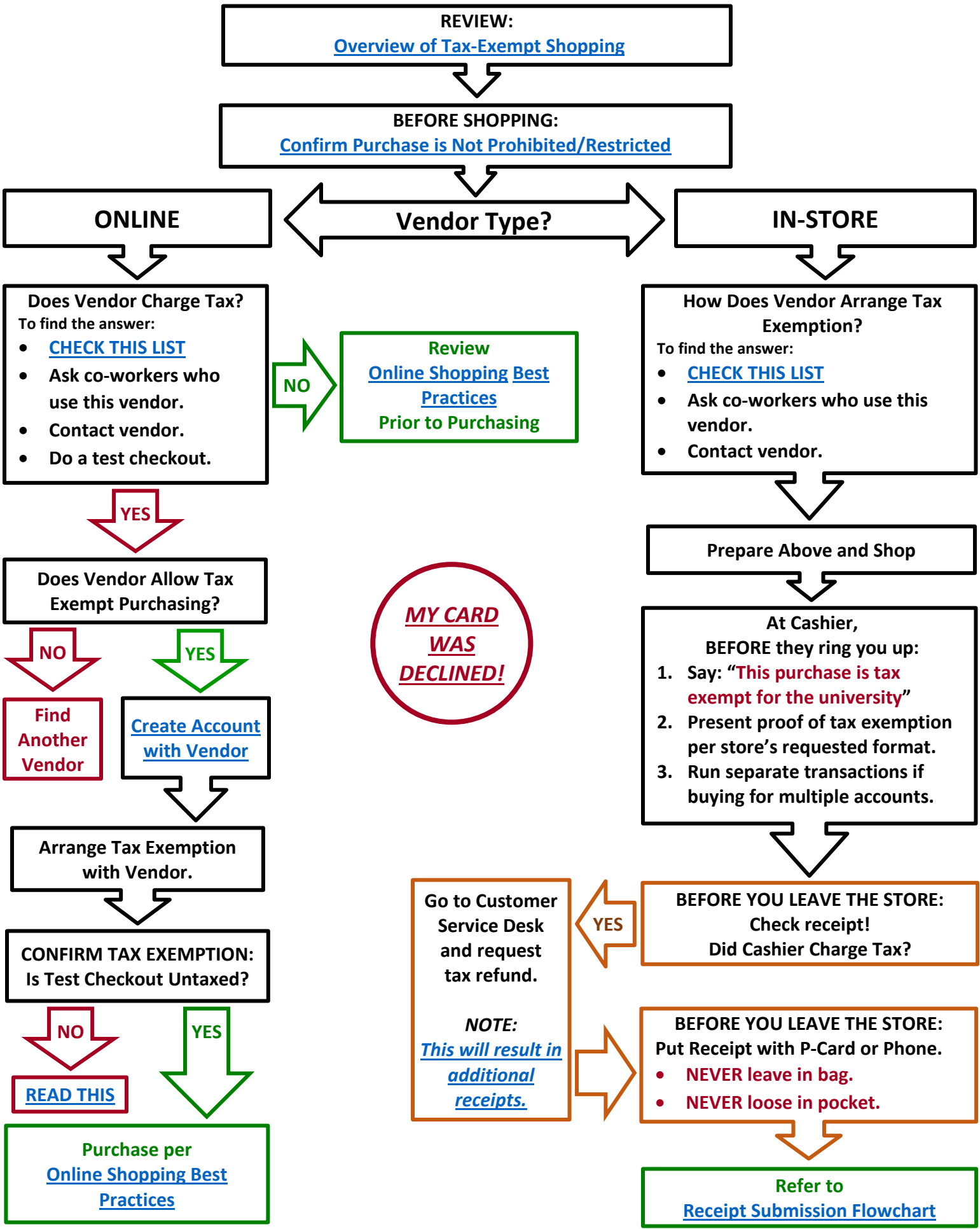


Tax Exempt Shopping
Rev 8/18/2023

FLOWCHART – TAX EXEMPT SHOPPING



P-CARD DETAILS

Limits/Cycle:

- Transaction Limit = \$5,000
- Monthly Cycle Limit = \$5,000
- Cycle ends on the 24th or every month and balance RESETS to \$0.00 on the 25th of every month.

Billing Address (for online purchases):

Contact: YOUR NAME as it appears on the card
Company (optional): KRANNERT CENTER
Address Line 1: KRANNERT CENTER
Address Line 2: 500 S GOODWIN AVE
City: URBANA
State: IL
ZIP: 61801

Tax Exempt Number (printed on your P-Card): IL E9989-9779

Tax Exempt Letter: contact Bill Kephart (kephrt@illinois.edu) for a PDF copy.

COMMUNICATIONS

READ all emails with subject lines beginning with "PCard:" or "CR:"

FORWARD to Bill any emails you receive from OBFS Card Services or Bank of America (BAML)

For the latest Receipt Submission Flowchart, refer to your last weekly reminder email titled "CR: REMINDER > ..."

END OF SECTION-----

*** Use graphics above to locate explanations below. ***

OVERVIEW OF TAX-EXEMPT SHOPPING

[\[Return to Flowchart\]](#)

SIMPLE RULES:

- Know how a vendor handles tax exemption BEFORE you buy.
- If you pay tax on a purchase, you will be REQUIRED to get it credited back.
- If a vendor does not offer tax exemption or way to credit back the tax, you CANNOT buy from that vendor.

NO SPLIT RECEIPTS!

Each receipt MUST be charged to a SINGLE ACCOUNT! If you are buying for multiple shows/accounts:

- IN-STORE: Have the cashier run a separate transaction for each account.
- ONLINE: Though it may cost you more in shipping, each online purchase MUST be for a separate account.

TAX EXEMPT SHOPPING: IN-STORE

- All physical stores charge tax but offer some process for tax-exempt purchasing.
- Common tax-exemption processes for in-store purchases:
 - Cashier asks for phone # associated with the university’s tax-exempt account, which is always (217) 333-1000.
 - or-
 - With every purchase, the cashier provides you with a tax exemption form to be filled out at the register.
 - or-
 - The store issues their own internal tax exempt #. In some cases, Bill Kephart can provide this number. In some cases, you will present our tax-exemption letter to the customer service desk, and they will issue you an internal number.

ISSUES & RESOLUTIONS:

- ISSUE: Despite being told the purchase is tax-exempt, the cashier accidentally charges you tax.
RESOLUTION: Go to the customer service desk to get it refunded back.

TAX EXEMPT SHOPPING: ONLINE

Tax exempt shopping online can be unpredictable.

- Online stores MAY or MAY NOT charge tax.
- You may not be able to confirm whether an online order is taxed until you are on the checkout page.
- Some online vendors use 3rd-party sellers, and while you may be tax exempt with the vendor, the 3rd-party seller may not honor that tax exemption.

If an online vendor DOES NOT charge tax, no special steps are required.

If an online vendor DOES charge tax:

- NEVER assume you can get tax refunded AFTER a transaction.
- ALWAYS arrange tax exemption BEFORE a purchase.
- If a vendor CANNOT offer tax exemption before or after a sale, you CANNOT buy from them.

The process varies, but typically:

1. You create an account with the vendor.
2. Submit our tax exemption letter to a designated address.
3. Tax exemption will be applied to all future purchases on that account.

Unusual tax exemption processes:

- Even after you set up tax exemption, some vendors only refund tax AFTER A PURCHASE.
This **IS** acceptable. The only thing that matters is that the tax gets credited back – either before or after a sale. That said, you MUST contact the vendor after every transaction and request a credit. This will result in an additional receipt to be submitted. Though not common, Etsy does this regularly.
- Other weirdness... Some vendors require you place a taxed order then contact them prior to processing/shipping, reference your tax-exempt status, and then they remove the tax before charging you. The first tax-exempt transaction with a vendor may require you jump through some extra hoops. Just be sure you understand the process BEFORE placing an order.

ISSUES & RESOLUTIONS:

- Vendor charges tax despite you having arranged tax exemption.
RESOLUTION: Contact the vendor and explain the situation. You can usually get the tax refunded in a separate transaction.
- Vendor misinforms you about tax exemption and you cannot get it credited back. When you inquire about tax exemption prior to a purchase, you may talk to a new/unknowledgeable rep who insists the Vendor does not charge tax, but then they do, and you get charged without the ability to have it refunded.
RESOLUTION: This is NOT your fault, and we’ll need to pay the tax. Note the situation in the purchase description when you submit your receipt.
- Vendor requires you complete a complicated tax-exemption form with questions you may not be able to answer.
RESOLUTION: Contact Bill before proceeding; he may have a simpler solution or can provide the answers needed.
- Vendor does not offer tax exemption but offers a unique, necessary product not available anywhere else.
RESOLUTION: **PRIOR** to purchasing, you will need approval from your department head and the Krannert Business Office. If you purchase without this approval, you will be required to return the item. This is a VERY RARE exception and will likely not be granted.
- You did NOT setup tax exemption prior to a purchase and vendor refuses to refund tax despite your tax-exempt documentation.
RESOLUTION: Well, you screwed up. Have the vendor submit a note/email explaining that policy and submit it with your receipt. We will need to pay the tax.

REIMBURSEMENT

Do NOT buy items with your personal money expecting reimbursement. The university **will not reimburse you for the tax** and the process takes several weeks. If the reimbursement is for a prohibited item or vendor, the university will deny your request.

[\[Return to Flowchart\]](#)

END OF SECTION

RESTRICTED & PROHIBITED PURCHASES

[\[Return to Flowchart\]](#)

FOOD & BEVERAGES

- **With a P-Card, you can ONLY buy food/beverages for use as props or construction supplies.**
- **With a P-Card, you CANNOT buy food/beverages intended for snacks or meals.**

Though only briefly mentioned in the Prohibited list below, food/beverages should NEVER be purchased with a P-Card unless they are for the following purposes:

- Prop food/beverages **consumed by actors as part of performance**, aka “consumables.”
- Food/beverages used as **construction materials**, e.g. milk for paint, noodles for macaroni art.

A bowl of candy for visitors in your office? TOTALLY prohibited on a P-Card. Coffee and granola bars for visiting artists? TOTALLY prohibited on a P-Card.

Contact Bill Kephart for several other options if you need to purchase beverages, snacks, or meals.

STAGE MANAGERS, HEADS-UP!

You are often requested to buy unusual things, and sometimes supervisors forget what is allowable. Watch out for pharmaceuticals. A visiting artist needs some antacid? Nope, you cannot buy it with a P-Card. If you buy cough drops, buy HERBAL cough drops – NOT medicated. Need to buy a propane tank or fuel for an outdoor heater for an Allerton performance? NOT allowed; gasses/fuels are prohibited.

Contact Bill Kephart if you are asked to buy anything unusual; there may be another means of purchasing.

PROHIBITED and RESTRICTED PURCHASES

The lists below are found online here:

<https://www.obfs.uillinois.edu/cms/One.aspx?portalId=77176&pageId=92162#guidelines>

Items/services you may be tempted to or asked to buy during your time at Krannert have been highlighted, but ALL Prohibitions/Restrictions listed below apply to you – REGARDLESS of what your supervisor requests of you. If your purchase gets flagged as prohibited/restricted, it’s a huge headache to resolve and may result in the Card Services issuing you an official reprimand. If you get any weird requests, see Bill Kephart before buying.

Prohibited Purchases

P-Cards may not be used for the following items:

- **Business Meals and/or refreshments for a specific event**
- Capital Development Board purchases
- Cash advances
- Catering
- Charter bus and charter air services
- **Chemicals** as specified (specific precursor and chemicals/toxins not allowed for purchase with P-Card)
- **Contracts - purchases for which the vendor requires an agreement or involves terms and conditions except as allowed under Restricted Purchases.**
- **Deposits - transactions that require a deposit involving terms and conditions**
- **Drugs and pharmaceuticals**
- Employee expenses while in travel status; travel status expenses include, but are not limited to:
 - Airport shuttles
 - **Automobile rentals**
 - Baggage fees
 - Insurance
 - Laundry and dry cleaning
 - Lodging, including reservations, and services
 - **Parking**
 - Per diem allowance
 - **Personal, rental, or system vehicle fuel**
 - Taxi cabs
 - **Tolls**
- Fuels including but not limited to: alcohol, ethanol, gasoline, diesel, kerosene, **propane**, fuel oil, aviation, and any other combustible liquid or gas
- Furniture with a unit cost of \$500 and above
- **Gift certificates, gift cards, cash-equivalent prepaid cards (8.1.4 Determine the Allowability of Gifts, Prizes, and Awards to Individuals)**
- House accounts; e.g., extension of credit by a vendor allowing the payment of goods or services over a period of time, or on a summary invoice or bill
- **Imported goods that must pass through customs**
- Lab or specialty gases, including but not limited to: liquid or compressed nitrogen, helium, and oxygen
- Laboratory animals
- Laminar flow fume hoods and biological safety cabinets
- Moving expenses (**8.6.8 Pay Professional Movers for Employee Moving Expenses**)
- **Parking tickets, prepaid tolls, or fines**
- Payments for or on behalf of **Foreign Nationals**
- **Personal purchases of any kind**
- Personal electronic communication services and equipment, including but not limited to: cell phones and accessories, internet service (ISP), cable, satellite, On-Star™, GPS devices, or any other service that is activated and/or billed in the name of the employee
- Professional and artistic services, including but not limited to: fees or expenses for attorneys, consultants, health-care providers, and independent contractors (**17.1 Consultants, Independent Contractors, and Honoraria**)
- **Purchases from business concerns of which an employee (or an employee's spouse, parent(s) or children) is a sole or principal owner, major officer, or primary employee.**
- **Purchases from system employees, their spouses, parents, or children.**
- Radioactive materials
- Recombinant deoxyribonucleic acid (RDNA)
- **Rental or lease of equipment or meeting space that is not system-owned, unless listed as an allowable contracted vendor listed on Strategic Procurement - Contracts & Awards page.**
- **Services involving labor and/or installation; e.g., tent rental, catering (see Restricted Purchases), on-site repairs, furniture setup, unless listed as a contracted vendor at University Procurement Contracts Search**
- Trade-in of inventoried equipment
- Travel and lodging expenses for employees and non-employees, including students and guests of the system
- Tuition fees for employees and students, including graduate students (See **Tuition Waiver Overview**; For employees see: **Tuition Waivers**; for students see: **1.1.4 How the University Reports Tuition and Fee Waivers**)
- Uniforms, including safety shoes
- **Vehicle purchases, reservations, or rentals, e.g., autos, trucks, and cycles**
- **Weapons, ammunition, or detonating equipment or material**

RESTRICTED PURCHASES begin on next page

Restricted Purchases

P-Cards can be used for the following items when corresponding requirements are met and appropriate funding is available. Related policies are noted where applicable to provide additional information on requirements and procedures before making any purchases from these categories:

- **Beverage and food equipment and supplies for public reception areas** - are allowable if the purchase is in compliance with (8.1.3 Determine the Allowability of Specific Expenditures), and fully documented in the P-Card software. **NOTE: This is equipment and supplies – NOT actual food or beverages.**
- **Calling cards** - are allowable if the unit maintains a log of all calls made on the card and reports to Payroll any personal calls made.
- **Computer software and electronic services** - are allowable if they meet the requirements of Restricted Items as outlined in 7.2 Purchase of Goods and Services. The term "electronic services" refers to software developed and hosted by a vendor which the end-user accesses over the Internet. Unlike traditional packaged applications that users install on their computers or servers, the vendor owns the software and runs it on computers in its data center. The customer effectively rents it, usually for a monthly fee. Prior to using a P-Card to purchase allowable software or electronic services with contracts (including 'click-through' agreements), units must complete and retain in their files the Software Purchased by P-Card or the Electronic Services Purchased by P-Card.
- **Conference fees** -use of the P-Card for conference fees is allowable only if there are no lodging expenses included in the cost.
- **Interdepartmental transactions** - are allowable for units that sell to external customers, including auxiliaries and activities; e.g., Campus Union Operations, system-owned bookstores, campus convenience stores, Conferences and Institutes, Division of Intercollegiate Athletics, and other system sponsored programs and events.
- **Material Transfer Agreement (MTA) payments under \$4,999** - are allowable if the MTA was processed in accordance with your University’s MTA contract process and the MTA is fully executed PRIOR to making the payment. Chicago should consult the Office of Sponsored Programs; Urbana should consult UIUC Purchasing; Springfield should consult UIS Purchasing.
- **Memberships** - see 8.1.3 Determine the Allowability of Specific Expenditures for additional information.
- **Off-site repair of equipment by incorporated entities** - are allowable if the amount of the repair is known in advance to be less than the Cardholder's maximum transaction limit and there are no terms and conditions.
- **Postage Stamps** - postage stamps for system mail are allowable from all funds. However, postage stamps purchased with state funds must be perforated with a Block "I" for identification purposes according to Illinois State Statute 30 ILCS 500/25-35. These perforated stamps are available for purchase at:
 - Urbana - Campus Mail (54 East Gregory Drive- Printing Building) or online through Illini Union Campus MailNon-perforated stamps are allowable only from institutional, gift and endowment, self-supporting (when related to the generation of the fund's revenue), and service plan funds.
- **Signs** - are allowable if no installation is done by the vendor and if the unit has written approval in advance that the sign meets university and Americans with Disabilities Act (ADA) requirements. (At University of Illinois at Chicago, obtain approval from Facilities Management; at University of Illinois at Springfield, obtain approval from Physical Planning and Operations; at University of Illinois at Urbana-Champaign, obtain approval from Project Planning and Facility Management).
- **Telecommunication equipment (other than phones or answering machines)** - is allowable if the unit receives approval for the purchase from the university telecommunications office. At University of Illinois at Urbana-Champaign, **networking equipment (wired and wireless)** that must be connected to the university network requires approval by Technology Services Network Design Office (NDO) prior to purchase.
- **Typesetting, printing, and binding (including office forms)** - is allowable if the unit has complied with applicable portions of the Illinois Procurement Code and any university regulations governing such purchases (7.2 Purchase of Goods and Services Printing Requirements).

[Return to Flowchart]

END OF SECTION

WARNING: You CANNOT use an existing, personal online account to make tax exempt purchases. You must create a separate account tied to your @illinois.edu email address to use the university’s tax exemption. And NEVER use that university account to make personal purchases.

- 1. Create an actual account for each vendor using your @illinois.edu email - regardless of whether tax exemption is needed.**
 - Do NOT use a personal account to purchase for the university.
 - AVOID checking out as a guest. It only a few extra seconds to create a vendor account, and it typically allows easier tracking, refunds, and access to receipt copies.
 - BE SURE to use the [Billing Address](#) located under **P-Card Details** beneath the flowchart.
 - If you are sharing shopping duties with an assistant, consider choosing a username and password you can share. This allows either of you to shop – BUT – NEVER share your P-Card with your assistant.
 - Unless required by a vendor, do NOT save your P-Card on the account; enter it with each purchase. Leaving your P-Card on a bunch of sites makes it easier to steal.
- 2. If vendor charges tax, set up tax-exemption per vendor instructions.**
 - Contact Bill Kephart (kephrt@illinois.edu) for a PDF of our Tax Exemption Letter if needed.
 - If the vendor requires you complete a complicated tax-exemption form with a bunch of questions which you may not be able to answer, contact Bill before proceeding; he may have a simpler solution or can provide the answers needed.
 - If possible, request the vendor confirm when your tax exemption has been approved.
- 3. Confirm tax exemption is in place.** [\[Return to Flowchart\]](#)
 - Not all vendors will confirm your tax exemption has been approved. The easiest way to confirm on your own is to do a test checkout. Pick a random item and process all the way to the checkout screen. Confirm the tax is \$0.00.
 - If purchased is taxed, there may be couple reasons:
 1. The vendor has not applied the tax exemption. Contact them to confirm.
 2. ***Some vendors – like Walmart.com – host 3rd-party sellers. While Walmart will honor your tax exemption, some of their 3rd-party sellers may not. You may need to search for similar items elsewhere on the site to find one which is tax-exempt. Or you may need to shop elsewhere.***
- 4. Remember: one receipt per account! Do not share/split a single order between multiple accounts.**
- 5. Place order.**
 - The initial receipts you receive confirming your order may not match the actual billing once the order ships, but it’s a good idea to hang on to them.
- 6. Refer to the Receipt Submissions Flowchart.** [\[Return to Flowchart\]](#)
 - The Receipt Submissions Flowchart is a separate set of instructions included in every Chrome River weekly reminder (subject line begins with **CR: REMINDER >**). As updates to those instructions may break links to the file, a direct link is not included here. Refer to your last reminder email for the latest instructions.

RETURNS/CREDITS via ONLINE VENDORS

If you receive a receipt for your refund, you’re good to go, but some vendors may simply issue the refund without a formal receipt. If you receive an email regarding the refund that can be submitted in lieu of an actual receipt as long as that email references the original order # and a refund amount matching the amount in Chrome River. If the refund was done over the phone, and no communication was received, you can either:

1. Contact the vendor and request a receipt/email noting the order # and amount.
2. Send an email to the vendor noting the order # and credited amount and simply request they confirm it. Use their response as your receipt.

MY CARD WAS DECLINED!

[\[Return to Flowchart\]](#)

- Regardless of the reason, if your card continues to be declined, you will call the following:
1. **CALL THE BANK FIRST** using the phone # on the back of the card and ask why the transaction was declined.
 2. If the bank cannot immediately correct the situation, call Bill Kephart (217-300-3943)

Reasons and Resolutions are noted below:

- **The purchase will put you over your monthly limit.**
RESOLUTION: You likely won't exceed your transaction limit unless you are making a \$5,000 purchase (!), but you could exceed your monthly cycle limit (see the transaction and monthly limit details under [P-Card Details](#) beneath the Flowchart).The bank can confirm this, but that information is also available on the BAML site. There's nothing you can do to change that limit but you CAN set BAML to alert you when you get close to your limit.
- **If online, you mistyped the card information -OR- did not use the [Billing Address](#) exactly as detailed.**
RESOLUTION: Double-check, particularly the billing address format, and if not resolved, call the parties above.
- **If in-store, you entered the wrong PIN at the register.**
RESOLUTION: If you have the BAML website available you can log in and view/verify your PIN.
- **The bank (BAML) suspected fraud on your card and froze it without your knowledge.**
RESOLUTION: As they are available 24/7, always call the bank first for an explanation. They may have temporarily suspended your card due to suspicious activity, but if you can verify the charges, they can immediately unsuspend your card. If they show your card as active, you'll know the problem is at the university level. Call Bill Kephart and he'll figure out what's going on.
- **Card Services (at the university) may have suspended your P-Card due to an issue.**
RESOLUTION: This is likely no fault of your own, and Bill will need to figure out what happened, but un-suspending your card may take several minutes/hours, so it may not be practical to wait in the store while it is resolved. Card Services is only available weekdays during business hours, so after-hours issues will need to wait for resolution.
- **Your purchase is from a prohibited vendor type or product and the transaction is being automatically declined.**
RESOLUTION: Your P-Card is blocked from purchasing items with specific merchant codes. Some vendors, like Walgreens or CVS may have some items classified as groceries and some classified as pharmaceuticals. If you try to buy a roll of paper towels and nose drops, the transaction *may* be declined if the nose drops are classified as a pharmaceutical. The bank can confirm whether this is the reason for the declination. There is no solution to this issue unless you can find an alternative vendor using an allowable merchant code. You are less likely to run into this issue if you purchase from Walmart/Target/Meijer/Schnucks and avoid drug stores like Walgreens and CVS.
- **It just ain't working on a particular machine in a particular store.**
RESOLUTION: Most likely the issue is not the credit card machine, but rather the card itself. Your P-Card may be worn and no longer readable. You can request a new one from the bank but talk to Bill first before you make that request.

[\[Return to Flowchart\]](#)

END OF SECTION

Requesting Refund for In-Store Purchase Accidentally Taxed

[\[Return to Flowchart\]](#)

Whether your fault or the cashier's, if you are charged tax in a store, you will need to visit the Customer service Desk and request a refund. Typically, they will refund the entire taxed receipt, THEN re-sell you the entire order without tax. That means you will leave the store with 3 receipts:

- Receipt # 1 – taxed sale**
Receipt # 2 – refund of taxed sale
Receipt # 3 – untaxed sale

All 3 of those charges will appear on your P-Card, so you will need to submit 3 receipts. It's a pain, and if you don't notice the tax until you leave the store, you'll need to go back. We all do it about once, then we never forget.

[\[Return to Flowchart\]](#)

END OF SECTION

TAX EXEMPTION PROCEDURES for COMMON VENDORS

[\[Return to Flowchart\]](#)

- For local vendors, the tax exemption number for Krannert Center is the same number used by every U of I department. If a local vendor has a university tax exemption # listed in their system under “U of I Vet Med” or “UIUC School of Business” – that’s FINE, you can use it – it’s all the same tax exempt #.
- For local vendors it doesn’t hurt to have a PDF copy of our tax exemption letter available on your phone. Carrying a printed letter would be ideal. Neither is required.
- In-store and online tax-exemption may be handled differently. A vendor-issued tax ID # for in-store use may not work online and visa versa.
- Some policies/vendor tax IDs referenced below may have changed.

Amazon

- ONLINE: ***Purchases through the university’s Business Prime account should already be tax exempt BUT ALWAYS confirm at checkout.***

NOTES: **Amazon shopping is NOT permitted unless you are an approved user of the university’s Business Prime account!** To request access, see “Amazon Setup & Conditions” located on the P-Card Resources page.

Blick Arts

- ONLINE: ***Use vendor-issued internal tax ID #: 60950552***

NOTES: Choose Business/School option at checkout and reference customer number above.

BMI Supply

- ONLINE: We are already in their system as tax exempt.

NOTES: STRONGLY suggest phone order as online purchases may not link to tax exemption.

Do It Best Hardware

- IN-STORE: ***No internal tax ID # needed, but iCard may be required for proof of university affiliation.***

NOTES: At cashier, mention purchase is tax exempt for the university. In addition to tax exemption you will get a 10% discount. You may need to present your iCard.

eBay

- ONLINE: ***Contact Bill Kephart for instructions on setting up a tax exempt account.***

NOTES: Apply online before purchase (see Bill for link). Submit tax exempt letter/data. Takes several days for approval.

Etsy

- ONLINE: ***No shared tax exemption/ID#. Set up your own @illinois.edu account and apply for exemption.***

NOTES: Below are the latest notes from a frequent user:
You send them the tax exempt letter after you create the account and then must send it to them periodically, I would say with every 2 weeks of inactivity on the account. They assign you a new customer service person each time but they will periodically unassign them if you stop emailing them. Sometimes it can take up to two weeks to re-establish your tax-exempt connection, with the letter and full order details every time. Allegedly they are fixing the system so it acts like ebay and takes the taxes off automatically, but that has not happened yet. Probably the most annoying company to get tax removed from.

Grainger

- ONLINE: ***Do Not Use P-Card; tax exempt purchases via iBuy only.***

NOTES: Per our university contract, only STAFF may order from Grainger via iBuy.

Harbor Freight

- IN-STORE: ***Tell cashier purchase is for the university and they will look up our tax exemption (see below).***

NOTES: The cashier will look up our tax-exempt letter alphabetically in a physical book. They may ask you what name is associated with the tax exemption. It will either be under "University of Illinois" or "Terry Thompson" (the name referenced on the exemption letter).

Hobby Lobby

- IN-STORE: ***Cashier has tax exempt form you fill out EVERY TIME you make a purchase.***

Home Depot

- ONLINE: ***See Bill Kephart***
- IN-STORE: ***Use vendor-issued internal tax ID #: 9050601218***

NOTES: For online purchases, you’ll need to create an account with your @illinois.edu email address, AND Bill will need to add you to his Home Depot profile for the Home Depot internal tax ID to appear on the checkout page.

JoAnn Fabrics

- IN-STORE: ***Cashier has tax exempt form you fill out EVERY TIME you make a purchase.***

Lowe’s

- ONLINE: ***No shared tax exemption or ID #. Set up a Lowe’s for Pros account tied to your @illinois.edu address.***
- IN-STORE: ***At cashier, use phone number 217-333-1000***

NOTES: In-store that phone # will bring up multiple departments at the university. Just tell them to pick one – it’s all the same tax exempt #.

McMaster-Carr

- ONLINE: ***shared tax exemption, but no internal tax ID # is needed. See below.***

NOTES: Create account using your @illinois.edu email. With your first order, locate the "Special Instructions" field and write "Please associate this account with University of Illinois Tax Exempt #: IL E9989 9779." If that field is not available when creating account, it will be available upon checkout, and exemption will be applied to all future purchases. MAKE SURE YOU CHOOSE CREDIT CARD AS THE PAYMENT METHOD – otherwise it gets billed generally to the university and will never get paid.

Mood

- ONLINE: ***You MUST set up tax exemption BEFORE purchasing. They will NOT retroactively credit tax!***
- IN-STORE: ***Unknown. Contact the physical store BEFORE shopping to determine tax-exemption process.***

NOTES: Create a Mood account with your @illinois.edu email. Request tax exemption letter from Bill and email to info@moodfabrics.com and request tax exemption be associated with your account. DO NOT PURCHASE until you receive confirmation your exemption has been approved. This may take several days.

Rose Brand

- ONLINE: ***NEVER ORDER ONLINE! Phone order through dedicated rep only! Reference acct #: KRANNE***

NOTES: ALWAYS use a dedicated rep! I assure you it will be a mess if you order online or call a random rep. See your supervisor for a direct contact or use the rep below:
Lisa Coulouris (lisa.coulouris@rosebrand.com), 201-809-1730 ext. 118

Meijer

- IN-STORE: *Cashier has tax exempt form you fill out EVERY TIME you make a purchase.*

Menards

- ONLINE: *See Bill Kephart*
- IN-STORE: *See Bill Kephart*

NOTES: All tax exemption for Menards is managed by Bill Kephart. DO NOT set up your own Menards tax exempt account. Contact Bill to be added to his exemption list, and he will provide you a scannable bar code for in-store use and instructions for online purchases.

Michaels

- IN-STORE: *Cashier has tax exempt form you fill out EVERY TIME you make a purchase.*

Office Depot

- ONLINE: *Do Not Use P-Card; purchase tax exempt via iBuy only.*
- IN-STORE: *Do Not purchase in-store.*

NOTES: Per our university contract, we get special pricing at Office Depot when we purchase via iBuy. Do NOT purchase in-store, as you will not get the university discount and prices are considerably higher. ONLY STAFF may use iBuy, so only staff may purchase from Office Depot. You can use the Office Depot public site to put together a shopping list of Office Depot SKU #s for a staff buyer.

Schnucks

- IN-STORE: *Cashier has tax exempt form you fill out EVERY TIME you make a purchase.*

Staples

- ONLINE: *Do Not Purchase from Staples; have a STAFF member purchase from Office Depot via iBuy.*
- IN-STORE: *Do Not purchase from Staples; have a STAFF member purchase from Office Depot via iBuy.*

NOTES: Per our university contract, we get special pricing at Office Depot when we purchase via iBuy. Shopping at Staples online and in-store will only cost you more money. If unavoidable, our old in-store vendor-issued internal tax ID # is 5364794759. It may work, but again, buying from Staples is discouraged.

Walmart

- ONLINE: *See Bill Kephart*
- IN-STORE: *Use vendor-issued internal tax ID #: 222100. Additional details below...*

NOTES: Contact Bill for detailed instructions on applying for online tax exemption at Walmart.com. It can take a couple days for confirmation. In-store, if you mention the university, the cashier may know that number by heart, or they may expect you to have it with you, but to save you hassles in the future (in case a cashier wants proof of your affiliation), bring a copy of our Tax Exemption Letter to the Customer Service desk and request a tax exemption card.

[\[Return to Flowchart\]](#)

END OF SECTION

*** END OF DOCUMENT ***