

Rev 4/2/2024

**BEFORE SHOPPING:**  
Confirm Purchase is Not Prohibited/Restricted

## Overview of Tax-Exempt Shopping

## Vendor Type?

ONLINE

- [CHECK THIS LIST](#)
- Ask co-workers who use this vendor.
- Contact vendor.
- Do a test checkout.

**NO**

**Make Purchase  
and Submit  
UNTAXED Receipt  
per  
Receipt Submission  
Flowchart**

- **CHECK THIS LIST**
- **Ask co-workers who use this vendor.**
- **Contact vendor.**



[Click here for detailed Step-By-Step instructions for TAXED purchases.](#)

**NO**



**You MUST Create Account with Vendor**

## AFTER

### Make Purchase

**Upon  
Order Confirmation,  
IMMEDIATELY  
Contact Vendor:**

1. **[REQUIRED]** Submit Tax Exemption Letter.
2. Request Credit for Tax Paid.

### STEP 3

## STEP 4

**[REQUIRED]**  
**SAVE a Copy of  
the Vendor Tax  
Policy as a PDF  
for Later  
Submission With  
Your Receipt.  
Policy MUST be  
an Official Source  
Online or Vendor  
Email**

### Make Purchase

After Purchase,  
Submit **TAXED** Receipt per  
Receipt Submission  
Flowchart

**Submit CREDIT Receipt per  
Receipt Submission  
Flowchart**

**BEFORE**

**[REQUIRED]**  
**Submit**  
**Tax Exemption**  
**Letter**  
**Per Vendor's**  
**Instructions**

**Has  
Tax Exemption  
Been Applied  
to  
Your Account?**

**NO**

**YES**

**YOU HAVE  
A CHOICE:  
READ THIS**

**MY CARD WAS  
DECLINED!**

**BEFORE YOU LEAVE THE STORE:**  
**Check receipt!**  
**Did Cashier Charge Tax?**



**Go to  
Customer Service Desk  
to Request Tax Refund.**

**NOTE:**  
*This will result in  
additional receipts*

**BEFORE YOU LEAVE THE STORE:**  
**ALWAYS Put Receipt**  
**With P-Card or Phone.**

- **NEVER leave in bag!**
- **NEVER loose in your pocket!**

**Submit UNTAXED Receipt per Receipt Submission Flowchart**

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

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## RESTRICTED & PROHIBITED PURCHASES

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

You can’t buy everything with a P-Card.

The CURRENT list of Restricted and Prohibited Purchases is found here:

[https://www.busfin.uillinois.edu/bfpp/section-7-purchasing/7\\_6\\_the\\_university\\_purchasing\\_card\\_pcard\\_/#guidelines](https://www.busfin.uillinois.edu/bfpp/section-7-purchasing/7_6_the_university_purchasing_card_pcard_/#guidelines)

Nope. Don’t just keep reading my instructions – click it. I’ll wait...

Skim through it, and you’ll note some common patterns emerge on what is/is not an acceptable P-Card purchase.

*If an item is Restricted or Prohibited, I CANNOT buy it?*

Mmmm, not exactly. The restrictions and prohibitions ONLY apply to purchases made with a P-CARD.

- **RESTRICTED items must meet certain conditions to be purchased with a P-Card.**
- **PROHIBITED items USUALLY cannot be purchased with a P-Card.**
- **BUT...**  
**MANY** of the items on either list can be purchased by other means, like a T-Card, an invoice, or through iBuy – though each of those methods has their own set of restrictions and prohibitions.  
**And SOME** items on either list CAN be purchased with a P-Card by submitting an Exception Request, but that Exception Request must be approved PRIOR to purchase. Exception approval may take several days.  
Contact to Bill Kephart if you need to purchase a Restricted/Prohibited item; he may be able to submit an Exception Request.  
BTW, though not stated on that list, university students are prohibited from having P-Cards. The Exception Request you signed to get your card, and renew each year, allows you to by-pass this prohibition.

*What if my supervisor directs me to purchase a restricted/prohibited item?*

DO NOT. The university will NEVER accept the my-supervisor-told-me-to-do-it excuse for purchasing a restricted or prohibited item/service. Those lists may change at any time, unannounced, and supervisors don’t often know the latest allowable purchases, so please do not rely on past practices or advice from a colleague; always refer to the lists. See Bill Kephart if you are unsure about any purchases.

*Well...what if I purchase it anyway?*

Card Services will issue you a non-compliance notification. Non-compliance results when you purchase a Prohibited or Restricted item on your P-Card. More than one and they suspend your P-Card temporarily. Keep getting them and you’ll lose your P-Card. Making matters worse, the university may not notice you purchased a Restricted/Prohibited item until they audit your purchases, and that may be weeks or months after the purchase.

So. You need to refer to the current list if you have any doubts about whether you can purchase something using your P-Card. Even better, contact Bill Kephart. It’s his job to ensure you have the most accurate information.

All that said, below are a few common purchases which may affect you...

### 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, 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.

Essentially, the above food/beverages aren’t food/beverages. Their purpose is not to feed someone.

If you need to purchase beverages, snacks, or meals for students/staff, these can be purchased by other means.

Contact Bill Kephart for several other options.

### SOFTWARE & ELECTRONIC SERVICES

Many departments subscribe to various online databases or software requiring yearly fees or upgrades. The university is super-picky about these purchases, because they essentially involve a contract. See *Computer Software and Electronic Services* in the Restricted items list. While they are allowable on a P-Card, they require submission and preapproval of additional documents BEFORE the purchase is made. And those documents must be submitted with the purchase receipt. These conditions apply to RENEWAL of software as well, so if you are asked to take over paying for an existing software license, you are subject to these requirements.

See Bill Kephart for details before you purchase.

### STAGE MANAGERS, HEADS-UP!

You are often requested to buy unusual things. 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 unless you request an Exception weeks ahead of time.

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

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

END OF SECTION

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## OVERVIEW OF TAX-EXEMPT SHOPPING

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

### UNIVERSITY REQUIREMENTS:

- If a vendor does NOT charge tax, no special steps are required.
- If a vendor offers tax exemption, **you MUST submit a copy of the university’s tax-exempt letter** per the vendor’s instructions, regardless of whether the vendor will honor that letter.
- If a vendor does NOT offer tax exemption, **you MUST submit a copy of the vendor’s tax policy** with your taxed receipt.

### KCPA GRAD P-CARD REQUIREMENTS:

- **One receipt per account.** All items in a single transaction, in-store or online, must be charged to a single account.
- While you are allowed to pay tax on purchases, it is not advised. You are giving away money for nothing in return. Avoid taxed purchases and request tax paid be credited back.

### BASIC RULES:

- **Know how a vendor handles tax exemption BEFORE you buy.**
- You MUST submit our tax exemption letter to any vendor who charges tax.
- For IN-STORE purchases: If you are charged tax, you are required to go to the customer service desk and request the tax be credited back.
- For ONLINE orders: If you have presented the tax exempt letter, but the vendor does not apply exemption to your account or does not return the tax paid, it is YOUR CHOICE to either pursue a tax credit or accept the loss.

### ONE ACCOUNT PER RECEIPT/ORDER

In addition to arranging tax exemption with a vendor, all items in a single transaction, in-store or online, 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 EXEMPTION LETTER

**The university REQUIRES this document be submitted to ALL VENDORS who charge sales tax.**

The tax exemption letter is a 1-page PDF titled “Illinois Sales Tax Exemption Certificate.” It will serve as your proof of tax exemption with virtually all vendors. For security reasons, it is not available online. If you have not already received a copy, contact Bill Kephart, or get a copy from a fellow cardholder.

### TAX EXEMPT SHOPPING: IN-STORE

- **All physical stores charge tax, but all 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 #. For more details, see [Tax Exemption Procedures for Common Vendors](#). A link to this section is also found in the flowchart as “CHECK THIS LIST.”
- **BEWARE of untrained clerks who may not know how to enter a tax exempt sale.**
  - Some will even tell you they cannot offer tax exemption rather than admit they don’t know the process. ALWAYS confirm tax exemption is possible BEFORE getting to the register. Often a manager will need to process the sale.

### 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, but a brief call or chat can quickly answer the question.
- 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. Watch for tax on the checkout page as an indication.

**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 know a vendor’s tax exemption policy BEFORE a purchase.
- You MUST create an account with the vendor (exemption cannot be applied to a “guest” checkout).

**Typically, tax exemption is arranged in one of the following ways:**

**A. Vendor Requires Tax Exemption Be Arranged PRIOR to Purchase.**

1. You MUST create an account with the vendor.
2. Submit our tax exemption letter to a designated address.  
NOTE: a few vendors have their own online form to be completed (like Walmart.com). ALWAYS contact Bill Kephart before you attempt to complete these forms. He may have the answers or an alternative solution.
3. Wait a reasonable amount of time for tax exemption to be applied to your account.
4. Tax exemption will typically be applied to all future purchases on that account.

**B. Vendor Requires You Purchase FIRST, THEN Request a Refund of Tax Paid.**

1. You MUST create an account with the vendor.
2. After the order, you submit our tax exemption letter to a designated address, referencing the order, and request a refund of tax paid.
3. This process will need to be repeated with each order.

**C. Other Weird Variations...**

- 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 your card.

### RETURNS/CREDITS via ONLINE VENDORS

If you receive a receipt for your refund, you’re good to go, but some vendors may issue the refund without a formal receipt. If you receive an email regarding the refund, that email can be submitted in lieu of an actual receipt as long as that email references the **original order # and a refund amount which matches 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.

**REIMBURSEMENT**

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

[\[Return to top of section\]](#)

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

END OF SECTION





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**ONLINE TAXED PURCHASES - STEP BY STEP**

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

While the Tax Exempt Shopping flowchart will lead you through the basic steps of purchasing, the steps below fill in the details.

**CAUTION: Do NOT 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.**

Confirm the tax policy of the vendor and follow the links below to the step-by-step instructions:

**NOTE: If Vendor does NOT charge tax, no special steps are required.**

- A. [Vendor charges tax and requires tax exemption be arranged BEFORE purchase.](#)
- B. [Vendor charges tax and requires tax exemption be requested AFTER purchase.](#)
- C. [Vendor charges tax but does NOT offer tax exemption.](#)

**Instructions for Each Exemption Process:**

**A. Vendor Charges Tax and Requires Exemption be arranged BEFORE purchasing:**

1. You MUST create an account with the vendor.
  - Do NOT use a personal account to purchase for the university.
  - BE SURE to use the [Billing Address](#) located under **P-Card Details** beneath the flowchart above.
  - Unless required by a vendor, or you regularly use the vendor, to prevent fraud, avoid saving your P-Card on the account.
2. Submit our Tax Exemption Letter per the vendor’s instructions.
  - If a vendor requires you complete an online form to arrange tax exemption rather than simply submit the letter (like Walmart.com) – DO NOT. ALWAYS contact Bill Kephart before you attempt to complete these forms, as you likely will not have the correct answers. Bill may have the answers or an alternative solution.
3. Wait a reasonable amount of time for tax exemption to be applied to your account.

**IMPORTANT: If approval is taking forever, you have a choice. [Read this.](#)**

  - When submitting the letter, request the vendor notify you once exemption is in place.
  - Some may not notify you, but you can always do test checkout of a random product, stopping before you pay, to confirm whether exemption is in place.
  - In some cases, your account may be tax exempt but the website will still show tax. Unless you want to pay the tax, ALWAYS confirm with the vendor whether this is a quirk of the website or whether your account is actually tax exempt.
  - In rare cases, some vendors require tax exempt purchases be placed OVER THE PHONE. In these cases, you will still need to create a vendor account and submit the tax exemption letter for them to reference on the backend before billing.
  - Typically once tax exemption is applied to your account, all future purchases will be tax exempt, but always check!
4. Once exemption is confirmed, you may purchase.
5. Refer to the [Chrome River Instructions](#) and click on the “PURCHASES – UNTAXED” link beneath the *Receipt Submissions Flowchart* for detailed instructions on submitting your untaxed receipt.

**B. Vendor Charges Tax and Requires Exemption be arranged AFTER purchasing:**

1. You MUST create an account with the vendor.
  - Do NOT use a personal account to purchase for the university.
  - BE SURE to use the [Billing Address](#) located under **P-Card Details** beneath the flowchart above.
  - Unless required by a vendor, or you regularly use the vendor, to prevent fraud, avoid saving your P-Card on the account.
2. Make your purchase.
3. IMMEDIATELY submit your order confirmation to the vendor WITH our Tax Exemption Letter attached, and request tax be credited back to your account.
  - Replying with your order confirmation gives the vendor all the details they need to associate the order with your credit request.
4. Refer to the [Chrome River Instructions](#) and click on the “PURCHASES – TAXED” link beneath the *Receipt Submissions Flowchart* for detailed instructions on submitting your taxed receipt.

As noted in those instructions, this taxed purchase falls under Scenario B and requires the following note:

***“Tax exempt documentation presented to vendor and refund of tax paid requested.”***
5. Watch for the credit to be applied to your account.

**IMPORTANT: If you are waiting longer than expected for a credit, you have a choice. [Read this.](#)**

  - Credits often take longer to post than charges, so it may be several days or over a week before anything is credited.
  - It is not uncommon for the vendor to credit your account but not send you a credit receipt. In this case, watch Chrome River for any credited charges and contact the vendor for a verification of the credit. An email from the vendor which confirms the **credited amount AND references the Order Number can serve as your receipt.**
6. Once credited, submit your CREDIT receipt per instructions linked to the email images beneath the *Receipt Submission Flowchart*.

**C. Vendor Charges Tax But Does NOT Offer Tax Exemption:**

1. Before proceeding, consider whether you want to lose the money paid in tax or find a vendor who offers tax exemption.
  - Paying tax is STRONGLY discouraged as you are essentially giving away that money for no benefit. It depletes your budget and is avoidable.
2. While you can check out as a guest, it is strongly recommended you create a vendor account.
3. You MUST save a copy of the vendor’s tax exempt policy as a PDF – NOT an image – for later submission with your receipt.
  - The policy MUST be saved from an official source, either posted on the vendor website or stated in an email from the vendor.
4. Make your purchase.
5. Convert your receipt into a PDF – NOT an image – and **ADD the PDF of the vendor policy as the LAST PAGE(S) of that PDF receipt.**
  - As you can only attach ONE file to your receipt submission, this will give you a single, multi-page PDF for submission.
6. Refer to the [Chrome River Instructions](#) and click on the “PURCHASES – TAXED” link beneath the *Receipt Submissions Flowchart* for detailed instructions on submitting your taxed receipt and policy in a SINGLE PDF.

As noted in those instructions, this taxed purchase falls under Scenario C and requires the following note:

***“Vendor does not offer tax exemption per the attached policy.”***

**YOUR CHOICE: Following Up On Tax Exemption And Tax Credit Requests**

With regard to paying tax, KCPA is strictly adhering to the letter of university policy.  
It lists only 2 obligations:

- 1. If a vendor charges tax, you must present them with the university’s tax exemption letter.**
- 2. If a vendor does not offer tax exemption, you must get that in writing.**

Pursuing a response to that letter or requesting a credit for tax paid is NOT a university requirement. That said, it’s Krannert’s money, and Krannert expects a reasonable amount of effort to avoid giving away money we are not obligated to pay. Also, any money paid in taxes is less money in YOUR budget, and with a few large purchases, that adds up.

**YOUR CHOICE**

**When a vendor is unresponsive to a tax exemption request or credit, you, in consultation with your supervisor, need to decide at what point the time spent pursuing a tax-free purchase becomes more costly than paying the tax.**

- If a vendor takes forever applying tax exemption to your account, you need to decide whether you want to keep bugging them until the exemption is in place, or whether you just want to make the purchase, pay the tax, and take the loss.
- If a vendor does not respond to your request to have the tax paid credited back, you need to decide whether you want to keep nagging them until they respond or just accept the loss.

**IF VENDOR NEVER RESPONDS TO YOUR REQUEST FOR TAX EXEMPTION:**

**If you submitted the tax exemption letter, but the vendor never applies exemption to your account, you can choose to purchase anyway (and pay the tax):**

- 1. Make your purchase.**
- 2. Refer to the [Chrome River Instructions](#) and click on the “PURCHASES – TAXED” link beneath the *Receipt Submissions Flowchart* for detailed instructions on submitting your taxed receipt.**  
**As noted in those instructions, this taxed purchase falls under Scenario A and requires the following note:**  
***“Tax exempt documentation presented to vendor, but vendor unresponsive.”***

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**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 \$7,500 purchase (!), but you could exceed your monthly cycle limit (see the transaction and monthly limit details under [P-Card Details](#) beneath the Receipt Submission 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 decline. 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

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**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

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**TAX EXEMPTION PROCEDURES for COMMON VENDORS** [\[Return to Flowchart\]](#)

- The university’s tax exemption number is printed on your P-Card, under your name.
- 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.
- Some local vendors will issue their own tax ID # rather than reference the university’s tax exemption #.
- 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](mailto: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](mailto: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

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