



GIFT REPORTING FORM

To also be used for participant payment, prizes and awards

Please submit to Financial Services by the 10th of the month following the month that the gift was received.

In order to protect social security numbers, please direct this form to Financial Services in care of Sarah Gietzen. Please mark the envelope as "Confidential."

Please inform recipients that items received may have tax implications.

PERSON RECEIVING GIFT

Name: _____

SSN: _____ M#: _____

Address: _____

City: _____ State: _____ Zip: _____

Is this individual an employee (including student employees) of the university? YES ☐ NO ☐

Is this individual a student at Missouri State University? YES ☐ NO ☐

Is this individual a Non-Resident Alien? YES ☐ NO ☐

GIFT DETAILS

Date of Gift: _____

Value of Gift: \$ _____

Description of Gift: _____

Reason for Gift: _____

Does this qualify as a length of service/safety award? (See gift policy for details) YES ☐ NO ☐

Univ Department Contact: _____

Ph: _____

UNIVERSITY APPROVAL

Sources of Monies Used (Indicate Account Title, Grant Name if Applicable and FOAP)

Person Giving Gift _____ Date: _____

Department Head Approval _____ Date: _____

Dean Approval (When appropriate) _____ Date: _____

Principal Investigator Approval (For grants only)

_____ Date: _____

Vice President Approval _____ Date: _____

Gift Reporting Form Instructions

Please submit to Sarah Gietzen in Financial Services by the 10th of the month following the month that the gift was received.

Please inform recipients that items received may have tax implications.

Specific Instructions for Gift Reporting Form or Mass Gift Reporting Form:

Date: Please provide the date that the gift was given.

Employee: Please mark the box next to “YES” if the gift was given to an employee or “NO” if the gift was given to a non-employee. Student employees should be marked with a “YES”.

Student: Please mark the box next to “YES” if the gift was given to a student or “NO” if the gift was given to a non-student. Some student gifts/awards/prizes must be turned into Financial Aid.

Non-Resident Alien: Please mark the box next to “YES” if the gift was given to a nonresident alien or “NO” if the gift was given to a U.S. citizen or a U.S. resident alien.

M-Number: Please include if M number is known.

Social security number: Needed for tax purposes. Please note that a social security number is needed even if an M# is known.

Description: Please provide a description of the award given. Example: “Bookstore gift card.”

Value: Please provide the value of the gift (even if discounts were used in procuring gift).

Reason/Event: Please explain why you are giving this gift. Examples: “SAC Game Night” or “Participation in Focus Group.”

Address: Please provide the address to which a 1099-MISC shall be sent if the gift is taxable.

Purchasing Department: Please list the department/office giving the gift. Examples: “Residence Life” or “History Department.”

Funding Source (FOAP): Please provide the FOAP from which the payment was made or from which the gift was purchased.

Mass Gift Reporting Form (Excel Sheet Available on E-Forms under Financial Services site)

Please submit both a paper and electronic copy of the Mass Gift Reporting Form.

A paper copy should be sent via campus mail to Sarah Gietzen in Carrington Hall 424. In order to protect social security numbers, please mark the envelope as “Confidential.”

Please e-mail an electronic copy of this document to Sarah at SarahGietzen@MissouriState.edu. In this copy, please do not send social security numbers. To do this, copy the original worksheet into a new workbook by right clicking on the “Mass Gift Reporting Form” tab on the bottom left of the workbook. Select “Move or Copy” to a new book, and check the box for “Make a Copy.” In the new workbook, select column E (Social Security Numbers), right click and select delete. Save this workbook and e-mail.

Options for approval:

- Copy your approvers on the e-mail to Sarah and have them respond to Sarah that they approve; or
- Print a copy of the form (without social security numbers) and send to your approvers. Once all approvals are granted, the document should be forwarded to Sarah Gietzen.