Each Purchasing Card transaction should include:

Attachments: itemized receipts (hotel folios, flight invoices, itemized restaurant receipts) showing proof of payment and supporting documentation like the original request for purchase or conference website. Sales tax should not be charged within the state of Wisconsin, online, or from a state with a sales tax reciprocity agreement. Meetings/events accompanied by food purchases must include a list of participants.
Business purpose: who, what, when, where and why. Please include participant names, what the purchase is, when/where is took place and why it was purchased. A good business purpose should satisfy an auditor who is trying to determine if there is enough information to confirm that funding was used in accordance with policy and advances the mission of the University. Supplies purchased outside of ShopUW+ must be accompanied by a cost comparison or a justification for using a non-contracted vendor.

Example: Registration cost for Professor Einstein who is traveling to the University of Oslo from Dec. 10 to Dec. 14, 2023 to receive the Nobel Prize. The conference is an opportunity for Professor Einstein to present the work he has been doing at UW-Madison, to discuss cutting edge research with fellow scientists and to network with colleagues.

Funding String: please make sure to use the correct accounting code when updating the funding string.
### Official Events, Hosted Events and Business Meals

**Definitions and Descriptions**

<table>
<thead>
<tr>
<th>Definition</th>
<th>Official Functions</th>
<th>Hosted Events</th>
<th>Business Meals</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reasonable and moderate expenditures (excluding alcoholic beverages) directly associated with a University Official Function and expense that may have a social component but substantially advances or contributes to the University's mission.</strong></td>
<td>Gathering of individuals associated with a UW-sponsored event that provides the opportunity for interaction in a setting that is not purely social in nature.</td>
<td>A Business Meal is a breakfast, lunch or dinner with a UW business purpose attended by multiple individuals. Business Meals are not catered, do not require a signed contract, and do not require a space or room rental.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Examples</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Recognition functions to honor distinguished faculty, staff and students for significant, meritorious achievements.</td>
<td>• Reception before/after a speaker's presentation</td>
<td>• Dinner with an invited speaker to discuss shared research interests.</td>
</tr>
<tr>
<td>• House hunting trip for faculty or staff (restricted to employee and one spouse/significant other/companion)</td>
<td>• Conference</td>
<td>• Lunch with a faculty candidate and interview committee.</td>
</tr>
<tr>
<td>• Employee recognition and morale/team building events such as honoring an employee retiring or separating from the University with at least 5 years of service and annual holiday/general appreciation events (one event per department or division).</td>
<td>• Training session</td>
<td></td>
</tr>
<tr>
<td>• Nominal gifts excluding gift cards and cash equivalents (UW logo items only less than $50.00) or flowers related to employee major life events such as weddings, births, or death in a family.</td>
<td>• Seminar</td>
<td></td>
</tr>
<tr>
<td>• See Official Functions Policy for full list</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Required Forms**

<table>
<thead>
<tr>
<th></th>
<th>Official Functions Pre-Approval Form</th>
<th>Event/Meal Form or its equivalent*</th>
<th>Event/Meal Form or its equivalent*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allowable on GPR or Grant funds?</td>
<td>No</td>
<td>Yes, up to meal limits*</td>
<td>Yes, up to meal limits*</td>
</tr>
<tr>
<td>Allowable on non-GPR or non-Grant funds?</td>
<td>Yes</td>
<td>Yes, up to meal limits*</td>
<td>- or if a registration fee was collected sufficient to cover amounts over meal limits</td>
</tr>
<tr>
<td>Appropriate use of Foundation Funding</td>
<td>Alcohol only, up to $50 per person.</td>
<td>May be used for amounts in excess of meal limits and for alcohol up to $50/person.</td>
<td>May be used for amounts in excess of meal limits and for alcohol up to $50/person.</td>
</tr>
<tr>
<td>$150/person total limit</td>
<td>Yes</td>
<td>Yes unless a registration fee was collected sufficient to cover amounts in excess of $150/person.</td>
<td>Yes</td>
</tr>
<tr>
<td>20% tip limit</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Sales Tax</td>
<td>Non-payable/Non-Reimbursable in Wisconsin or in a state with a sales tax reciprocity agreement.</td>
<td>Non-payable/Non-Reimbursable in Wisconsin or in a state with a sales tax reciprocity agreement.</td>
<td>Non-payable/Non-Reimbursable in Wisconsin or in a state with a sales tax reciprocity agreement.</td>
</tr>
</tbody>
</table>

**Meal Limits**

<table>
<thead>
<tr>
<th>Meal Limits</th>
<th>Within Wisconsin</th>
<th>All Other Continental US</th>
<th>All Other Locations - Including International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>$20</td>
<td>$23</td>
<td>$35</td>
</tr>
<tr>
<td>Lunch</td>
<td>$21</td>
<td>$24</td>
<td>$40</td>
</tr>
<tr>
<td>Dinner</td>
<td>$35</td>
<td>$43</td>
<td>$60</td>
</tr>
<tr>
<td>Refreshment Break - a morning or afternoon break that is part of a larger conference or event</td>
<td>$12</td>
<td>$15</td>
<td>$20</td>
</tr>
<tr>
<td>Reception - a stand-alone event not associated with a specific meal</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Account Codes:**

- Catering: 2893
- AV Equipment: 2894
- Meeting Space: 2895
- Food (In-state, Out-of-state, foreign): 2860, 2861, 2862

*Event/Meal Form: providing information about the event name/date/location, an agenda, and a list of attendees, including how each of the attendees is affiliated with the university is acceptable in place of the form.*
**Additional notes**

**Business meal:** a breakfast, lunch or dinner with a UW business purpose attended by multiple individuals. Business meals are not catered, do not require a contract, and do not require a space or room rental. University funds may be used to pay for group meals where UW business is conducted or the meal is otherwise supported by a UW business purpose. Business meals may have a social element but are primarily business in nature. Payment/reimbursement for business meals on UW funding is limited to pre-determined rates. Amounts in excess of these rates and alcohol are not allowable on UW funding and may be charged to the Wisconsin Foundation and Alumni Association if funding is available.

**All business meals** must be supported by an itemized receipt, event name/date/location, an agenda, and a list of attendees, including how each of the attendees is affiliated with the university.

We encourage you to use the Events Forms as a quick and easy way to provide the relevant information (**Meals, Refreshments, Receptions**).

*For events that are catered, require a room/space rental, require a contract, or charge a registration fee, see [Hosted Events](#).*

All **contracts** for events taking place **off-campus** (with non-UW facilities) **must be reviewed, signed, and approved by Purchasing Services** at UW–Madison.

Hosted Event payments in excess of **$5,000** must be processed on an external requisition.

When the total cost of an event taking place off-campus is expected to exceed $5,000, a **simplified bid** must be performed to select a vendor.

- Total costs include: hotel rooms, meeting rooms, catering, AV, etc.
- Exception: Bidding is not required if participants are paying registration fees to attend the event **AND** the collected fees will cover the entire cost of the event.
- Exception: Bidding may be waived if a **sole source justification** is provided. Purchasing Services will determine if the sole source justification is approved.

*For events that are primarily social in nature, see [UW-3075 Official Functions and Expenses](#).*