



EXPENSE REIMBURSEMENT POLICY EXCEPTION REQUEST

UNIVERSITY POLICY:

University travel policies are established through the system wide travel governance process and have been designed to meet the business objectives. Travel policies apply to all faculty, staff, visitors, students, guests and other non- University personnel, including consultants/contractors traveling or using funds and/or resources administered by UW System Institutions. As such, all travel policies and operational standards must be consistently applied at each UW System institution.

University Requirements for Accountable Plan

For travel reimbursements and payments to be considered non-taxable income, the University’s travel policies and operational standards must comply with the IRS Accountable Plan Rules. To be considered an “Accountable Plan” an employer’s business expense reimbursement arrangement must meet the following conditions:

- Business Connection: Reimbursements provided to travelers under the plan must be for business related expenses only.
- All expenses must be substantiated in writing and with any required itemized receipts **within 90 days** after the trip completion date or incurrance of expense or will not be reimbursed by the University. If a 90-day exception is granted, reimbursed expenses will be reported as taxable income.

Exception Requirements

Exceptions to reimbursement requirements shall be reserved only for extraordinary circumstances, such as serious illness or unforeseen emergency to the traveler. The Vice Chancellor for Business & Finance has sole authority to grant exceptions for expense reimbursements.

For a more detailed explanation of the **University System-Wide Travel Policy** please refer to the link in UWTRAVELWISE:

<https://uw.foxworldtravel.com/policies-and-procedures/>

PROCEDURE TO REQUEST EXPENSE EXCEPTION:

1. Complete form and route by email to travel@uwgb.edu
2. Request will be reviewed and returned to the traveler by email with APPROVE/DENY decision
3. The traveler **MUST** attach this form to their electronic Expense Reimbursement Request when they submit it

Name of Individual:	Division/Department:
Employee ID Number:	
Travel/Expense Dates:	Date Submitted:
Total Expenses:	Expense Report Number:
Exception Request Justification:	
<i>Please explain the facts and circumstances related to why you feel an exception should be granted for your expense reimbursement. Attach additional sheets if necessary and any relevant documentation.</i>	
Individual's Signature:	Date:

Vice Chancellor for Business & Finance or Designee - Action on Request:	
Exception Approved	Exception Denied
Vice Chancellor for Business & Finance or Designee Signature:	Date:
Vice Chancellor/Designee Comments:	