

University of California, Merced

Request for Exception for University Travel & Entertainment Policy

This statement is to be used to document expenses that are non-compliant with the University's policies in accordance with G-28 and/or BUS-79, section V.A.3. The statement should be completed by the individual seeking reimbursement and reviewed by the department's Chief Administrative Office and the Budget Authority for the expenses. The completed form should be submitted through Service Now using the [Exception to Policy/Higher Approval](#) ticket. Travel & Expense Management will then forward it to the Controller for review. **Approved exceptions will be recorded and future exceptions for similar violations MAY not be granted.**

Regarding travel and entertainment related exceptions: All University travelers are responsible for knowing and understanding the travel and entertainment policies. Refer to G-28, Policy and Regulations Governing Travel, and BUS- 79, Expenditures for Business Meetings, Entertainment and Other Occasions, for guidance and clarification. Current policies can be found at: travel.ucmerced.edu

Regarding grant funded expenses: Per the Controller, Research Administrators are required to review and approve expenses to ensure they are allowable based on grant award. Please provide either an approved copy of the scope of work that outlines the acceptable activity from the sponsor or attach sponsor level approval for the activity if it is not outlined in the approved agreement documentation, or other governing policy exceptions.

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A. Traveler/Requester Information

Name: _____ Date: _____

Department: _____ Dept. Code: _____

B. Financial Information

PO/Report Key/PTA Number: _____ Amount: \$ _____

Chart of Accounts to be charged:

Entity Fund HR Unit Function Program Project Task Physical Location Sub-Activity

Is this a Grant: Yes No: If yes, please see Regarding grant funded expenses" above

Event Dates:

Business Purpose:

C. Justification for Exception

Name & portion of policy for which exception is sought:

Use this space for explanation and justification for deviation from policy. Explain what actions have been taken to prevent further non-compliance of established policy and procedures. Attach necessary supporting documentation.

[Empty box for justification]

D. Reviewed By:

Requester Signature:

CAO Signature:

Budget Authority Name & Signature (VC or Dean):

Grant/Gift Funding Approval (Research Administrator):

Campus Controller Use Only: Control Point Response: Approved Denied. Name Signature Date