

University of California, Merced

Request for Higher Approval for University Travel & Entertainment Policy

This statement is to be used to document expenses that require higher approval and are within the University's policies accordance with G-28 and/or BUS-79, section V.A.3. The statement should be completed by the department seeking higher approval 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.

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 expenses requiring additional approval: Certain expenditures require additional approval at a higher level. The following expenses require such approval:

- Entertainment of the spouse, domestic partner, other partner, or family members of the official host or guest;
- Tickets to a sporting, theatrical, or musical event;
- A cash contribution which includes the cost of a meal or registration fee made to a nonprofit organization in connection with an employee's attendance at a fundraising event; and
- Employee morale building and employee recognition events.

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. Expense Requiring Additional Approval

Use this space for business justification of expense, i.e. how did it benefit the University or support the University's mission? Attach necessary supporting documentation.

[Empty box for business justification and supporting documentation]

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