



Exception Request Form - Expense Reimbursement > 60 days

**Policy:** Effective for expenses incurred or paid on March 1, 2025 or later, all expense reports must be reconciled and submitted within 60 days of when the expenses were incurred or paid to comply with IRS guidelines. Any expenses reports not submitted within 60 days of when the expenses were incurred or paid will not be reimbursed by the University.

Exceptions may be made for extenuating circumstances. A detailed explanation of such circumstances should be submitted for approval by the submitting department's Executive Vice President (or equivalent) of the University. The approval must be included with the expense report submission. In such circumstances, expenses reimbursed after 60 days will be reportable along with wages, salary and other pay included in Box 1 of the employee's Form W-2 and subject to applicable taxes as in accordance with IRS Publication 463.

Requester:	
Date of Exemption Request:	
Payee:	
Date of Expense:	
Description of Expense	
Amount of Expense (\$)	
Reason for Exemption:	
Approver Name & Title:	
Signature:	
Date of Approval:	
Approver Name & Title:	
Signature:	
Date of Approval:	
Required Approvals:	
<b>Schools &amp; Colleges:</b> School's dean and then Provost	
<b>Non-Academic:</b> Ray Coto, Chief Financial Officer or Alison Mincey, Chief Human Resources Officer	