



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 in accordance with IRS Publication 463.

Date of Exception Request: _____

Payee Name: _____ Expense Amount (\$): _____

Expense Item (e.g. Airfare): _____

Reason for Exception: _____

Approval 1: School’s Dean, Provost (if submitted by a Dean) or Departmental VP (for Non-Academic units)

Print Name & Title: _____ Signature _____ Date: _____

Approval 2: CAO or VP Total Rewards

Print Name & Title: _____ Signature _____ Date: _____

Required Approvals:
Initial Approvers: First approval should be routed to the respective Dean or Departmental VP. The Provost's approval is only required if the submitter is a Dean.
Final Approvers: Aintzane Celaya, Chief Accounting Officer or Cristina Elgarresta, VP, Total Rewards