

# University of California, Merced

## Business and Financial Services

### **Request for Exception to Travel or Entertainment Policy**

This statement is to be used to document travel or entertainment expenses that are non-compliant with Travel and Entertainment policies. The statement should be completed by the individual seeking reimbursement or prior approval and reviewed by the department's Management Services Officer and the Budget Owner for the expenses. The completed form should be forwarded to the Controller for approval. **Approved exceptions will be recorded and future exceptions for similar violations may not be granted.**

All University travelers are responsible for knowing and understanding 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: [policies.ucmerced.edu](http://policies.ucmerced.edu).

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## Business and Financial Services

### Request for Exception to Travel or Entertainment Policy

#### Traveler/Requester Information

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Department Name: \_\_\_\_\_ Dept. Code: \_\_\_\_\_

#### Exception Information

PO/TR/PTA Number: \_\_\_\_\_ Exception Amount: \$ \_\_\_\_\_  
(Leave blank if seeking prior approval)

Account/Fund to be charged: \_\_\_\_\_ Budget Name: \_\_\_\_\_

Summary of Event: \_\_\_\_\_  
(Indicate event dates and business purpose)

Policy for which exception is sought: \_\_\_\_\_  
(Indicate policy name/no. and portion of policy excepted)

#### Justification for Exception:

*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.*

Requester: \_\_\_\_\_  
Signature

MSO: \_\_\_\_\_  
Initial

**Reviewed by:** Budget Owner (Vice Chancellor or Dean):

\_\_\_\_\_  
Name Signature Date

#### Do not write below

**Control Point Response:**  Approved  Denied

M. Monir Ahmed \_\_\_\_\_  
Signature Date