Finance TAX COMPLIANCE & PLANNING
UNIVERSITY OF MICHIGAN

Accountable Plan Exception Request Form

Submitter:_____ Title:_____

Email:_____ Department:_____

Transaction Date:_____

Expense Type: □ Transaction □ Trip □ Event □ Exam □ Other (please describe):_____

_____

(please provide below a brief description, e.g., purchase of a good, subscription, dues, etc.)

Number of Expense Items:_____ Total Amount:_____

(Expenses for multiple purchases, events and/or trips should be included by separate expense types on the attached statement, Expense Form for Multiple Purchase and/or Events).

Expense Approver:_____ Title:_____

Signature:_____ Date:_____

(Expense approver may be the supervisor. However, the Dean, Director or Department Head must sign as approver when the expense report exceeds $10,000).

Please Check the Applicable Box

☐ **Noted Exception**: The expenses are beyond the 45-day period, but they fall within 60 days of the start date as defined in section III. above and the individual has made a good-faith effort to comply with the SPG.

☐ Exceptions Based on Extenuating Circumstances; please provide details in box below:
- ☐   Extended personal illness
- ☐   Death in the family
- ☐   Unanticipated leave of absence
- ☐   Unforeseen emergency beyond the control of the employee
- ☐   Other

Please provide receipts and documentation along with the form

■   Please provide an explanation below and attach any documents as support.

Please contact the tax team with any questions at taxreporting@umich.edu.

Form for Multiple Purchases, Events and/or Trips

Fill out the form for multiple purchases, events and/or trips that are beyond the submission date.

Purchase(s)/Event _____ and End Date(s) _____

Expense Description	Expense Date	Business Purpose Details	Amount
Total			

Purchase(s)/Event _____ and End Date(s) _____

Expense Description	Expense Date	Business Purpose Details	Amount
Total			