



NON-EMPLOYEE TRAVEL REIMBURSEMENT FORM

This form is required to be completed by all non-employee travelers seeking reimbursement for approved University travel expenses. Approval must be obtained PRIOR to travel commencing. A delegate of the University will process the reimbursement request within SAP Concur.

Traveler's Name: Jesse Franklin

Non-Employee must declare residency status by checking the appropriate box:

Complete Mailing Address: 8 S Willard St unit 2, Burlington VT 05401

☒ Non-Employee is a United States Citizen (no additional documentation required)

Daytime Phone #: 3033301185

☐ Non-Employee is a Permanent Resident - [Non-Employee Information](#) form required.

E-mail Address: jesse.franklin@uvm.edu

☐ Non-Employee is a Resident for Tax Purposes - [Non-Employee Information](#) form required.

Business Purpose: Workshop on Number Theory in Function Fields.

☐ Non-Employee is neither a United States Citizen, nor a Permanent Resident, nor a Resident for Tax Purposes - ([Non-Employee Information](#) form required, as well as all required documentation to authorize payment as defined on the [Non-U.S. Citizen Payment Guidelines](#)).

Notes:

Departure			Arrival		
Location	Date	Time	Location	Date	Time
Burlington, VT	3/11/24	12pm	Penn State	3/11/24	11pm

To determine the Daily Meal Per Diem rate see U.S. General Services Administration (GSA) [Per Diem - CONUS](#) or [Department of Defense - OCONUS](#). If Per Diem rates are utilized, meal receipts are not required. If claiming less than Per Diem, itemized meal receipts are required.

GSA requires a 25% rate reduction on the first and last day of travel due to the fact that one meal will occur "at home." This reduction is automatically calculated within SAP Concur.

Personal vehicle mileage reimbursement rate is calculated using the [Internal Revenue Service established rate](#).

The following table contains a list of expense types and indicates if itemized receipts are required. If receipts are required, they must be submitted with this form. If receipts are required but not provided, the expense will not be reimbursed. Any itineraries and/or conference schedules should also be included.

Receipt Required?	Expense Type	Receipt Provided?
Yes	Airfare (if paid with personal funds)	<input type="checkbox"/>
Yes	Other Long Distance Transportation: Bus / Trains	<input type="checkbox"/>
No	Local Metro / Subway / City Bus / Tolls	<input type="checkbox"/>
No	Mileage (if personal vehicle) Miles (see IRS mileage reimbursement rate above)	<input type="checkbox"/>
Yes	Rental Car	<input type="checkbox"/>
Yes	Fuel (rental car only)	<input type="checkbox"/>
Yes	Taxi / Shuttle / Limo	<input type="checkbox"/>
Yes	Parking	<input type="checkbox"/>
Yes	Lodging	<input checked="" type="checkbox"/>
No/Yes	Meal Per Diem (if claiming less than Per Diem, itemized meal receipts are required)	<input type="checkbox"/>
Yes	Other (please list):	<input type="checkbox"/>

By submission of this expense form, I certify that: (1) the expenses claimed as reimbursable on the form are a true and accurate accounting of the necessary business-related expenses incurred for this business trip; (2) there are no items listed as reimbursable which relate to personal or unallowable expenses; (3) I have not and will not be receiving reimbursement from any other source for these expenditures nor have any of these expenses already been paid by another entity, and (4) the reimbursement amount calculated within SAP Concur is the full and final reimbursement.

Traveler's Signature

Jesse Franklin

Date 3/15/24



Non-Employee Information Form

I. GENERAL INFORMATION

PLEASE PROVIDE ALL INFORMATION REQUESTED

IMPORTANT INFORMATION ON THE SECOND PAGE

This form is for collection of information and does not cover all documentation that may be required for payments to all non-employees.

Last or Family Name Franklin	First or Given Name Jesse	Middle Initial E	Date of Birth 2/22/1998
Street Address 8 S Willard St unit 2		Telephone Number 3033301185	Country of Legal Residency USA
City Burlington	State or Province VT	Zip or Postal Code 05401	Country of Mailing Address USA

II. RESIDENCY STATUS - For Tax Purposes Only

- ☒ 1 **I AM A UNITED STATES CITIZEN** I hereby certify that I am a citizen of the United States of America.
- ☐ 2 **I AM A PERMANENT RESIDENT** I hereby certify that I have been given privilege, according to U.S. Immigration Laws, of residing permanently in the United States as an immigrant, and that this status has not been revoked, and has not been administratively or judicially determined to have been abandoned. Attach a W-9 Form if receiving income other than expense reimbursement. **Do not attach a W-9 Form if only being reimbursed for expenses.**
- ☐ 3 **I AM A RESIDENT FOR TAX PURPOSES** I hereby certify that I am a resident of the United States of America, for tax purposes, because I have met the Substantial Presence Test for residency. **Attach a copy of your Admission Stamp or I-94 verification.** Attach a W-9 form if receiving income other than expense reimbursement. **Do not attach a W-9 Form if only being reimbursed for expenses.**
- ☐ 4 **I AM A NON-RESIDENT FOR TAX PURPOSES** I DO NOT meet the requirements for residency in the United States of America. **Attach a copy of your Admission Stamp or I-94 verification.**

III. ADMISSION CLASSIFICATION

Please indicate the classification with which you will enter the United States or with which you are currently in the US.

If you checked either box 1 or 2 in the residency section above, do not complete this section.

- ☐ B-2 or WT (visa waiver tourist classification) Entering the U.S. on this admission class will prohibit Penn State from making any payments or expense reimbursements to you, unless each requirement in Part IV is satisfied. (Canadian and Mexican residents without an Admission Stamp must check this designation.)
- ☐ B-1 or WB (visa waiver business classification) Entering the U.S. on this admission class will prohibit Penn State from making any payments to you other than the reimbursement of actual travel expenses, unless each requirement in Part IV is satisfied.
- ☐ F-1 Student ☐ H-1B
- ☐ J-1 Exchange Visitor ☐ Other - please specify: never entered the US

IV. PAYMENTS TO B-1/WB and B-2/WT ADMISSION CLASSES

Acknowledgement of individuals on a B-1, B-2, WB, WT visa status or those who are exempt from visa requirements. Check those that apply:

- ☒ The honorarium payment and/or expense reimbursement will relate to an academic activity.
- ☒ In the last six months, I have not accepted an honorarium or expense reimbursement from more than four other institutions of higher education and/or research institutions within the United States of America.
- ☒ My activity at The Pennsylvania State University or another institution in the United States will be for 9 days or less.

Treaty Usage: In order to claim treaty exemption from U.S. Federal Income Tax, you must submit a completed IRS form 8233 (Exemption from Withholding for Compensation of Independent Personal Services of a Non Resident Individual). These forms (8233 and NEI forms) must be completed EACH time you wish to claim exemption, even within the same tax year.

I hereby certify, under penalties of perjury, that all of the above information is true and correct.

Signature Jesse Franklin

Date 3/15/24

SPECIAL NOTE: A Social Security Number is required only for income payments, but is NOT required for expense reimbursement. When required for payments, Non-Residents for tax purposes should supply their Social Security Number or Individual Tax Identification Number directly to their host department.