

Caltech

Immigration Expense Reimbursement Form

Purpose: This form is intended for reimbursing U.S. immigration-related costs in connection with non-immigrant visas and applications for U.S. permanent residence.

Reimbursements may include legal fees, medical exams, visa and other document fees. When these costs are for the benefit of Caltech, they qualify as valid business expenses; therefore, such reimbursements are not taxable to the employee. All other costs, including eligible costs for dependents, are treated as taxable income to the employee.

Please select and complete the section that applies to your situation.

Section 1: Reimbursement for Caltech-Sponsored Green Card Application Costs

****Complete this section if you have a Caltech Sponsorship for Permanent Residence and Repayment Agreement. Sign on the Employee Signature field in Section 1.****

Employee Name:			
UID:		Amount:	
Description of Expenses:			

The following documents must be submitted with the reimbursement request:

1. Completed Immigration Expense Reimbursement Form
2. Copy of signed Sponsorship for Permanent Residence and Repayment Agreement
3. Proof of payment (paid receipt or paid invoice copy)

Employee Signature/Date:	
--------------------------	--

Section 2: Reimbursement for Other U.S. Immigration Related Costs

****Complete this section if you DO NOT have a Caltech Sponsorship for Permanent Residence and Repayment Agreement. Sign on the Employee and Approver Signature fields in Section 2.****

Employee Name:			
UID:		Amount:	
Description of Expenses:			
Business benefit to Caltech*			

**Please provide a detailed description of the business benefit to Caltech to fulfill IRS documentation requirements. Requests with insufficient information will be treated as taxable income.*

The following documents must be submitted with the reimbursement request:

1. Completed Immigration Expense Reimbursement Form
2. Proof of payment (paid receipt or paid invoice copy)

Division Approval (Section 2 Only)

I have reviewed this request and confirmed that it qualifies as a valid Institute business expense. The receipt provided has been verified as appropriate and approved for non-taxable reimbursement.

Employee Signature/Date:	
Approver Signature/Date:	