Getting Started – Mason Finance Gateway

The Mason Finance Gateway, powered by Chrome River, is our new expense management system. It replaces the current Travel Request System and several manual reimbursement forms (Food & Beverage, Payment Request) that were previously submitted for reimbursement and processed through Accounts Payable.

All employees are required to complete the Mason Finance Gateway Navigation training prior to receiving access to the system. This training is available in Mason Leaps. Once training is completed you will receive an email with login instructions.

Getting Started

1. Login to the Mason Finance Gateway. *Hint: Bookmark the test site page and click Remember me for quicker future login attempts.* (Single Sign on with 2FA is required, [click here](#) for more info)
2. Once logged in, you will land on the Dashboard. To begin a new document, click on + New and then New Expense Report or New Pre-Approval Report.

3. Complete the report information as follows:
   a. *Report name:* Enter the report name following the suggested format
   b. *Start Date and End Date:* Select Start Date and Enter Date of the travel/event for expense(s)
   c. *Employment Status/Payee:* Select Employee, Student or Non-Employee
   d. *Reason for expense:* Select the appropriate category (Travel or Non-Travel by employment status)
   e. *Enter Country* (if applicable)
   f. *Enter Destination* (if applicable)
   g. *Enter Business purpose-* Enter detailed description of the nature of the charges.
   h. *Click Save*

   Only click “Import Pre-Approval” if one has already been created and you are now submitting a reimbursement for pre-approved travel expenses.
4. Under **Add Expense**, click **Create New**. Expense tiles will display based on the selected *Reason for Expense*. For example, when Employee Non-Travel is selected, you will not see any Travel Expense tiles to select.

5. Specific expense types are grouped together under a main tile. Clicking on a tile will show more specific expense types if applicable. **Note:** Each expense tile is tied to an account code in Banner. This allows the reimbursement request to be transmitted to Banner without any data entry by Fiscal Services staff.

6. Select one or more Expense(s) to add to the reimbursement document. Each tile may require different information from the user. Additional compliance warnings and violation are also built into the system. **Warning** – lets the user know they are not following an established rule, but does not prevent submission. **Violation** – prevents the user from continuing and/or submitting the document for approval (hard stop).

7. Each expense requires an **Allocation**. If applicable users may also enter an **Activity** or **Location** code. When you begin typing the Fund/Org, the field will populate with the appropriate Allocation string with will show the full FOAPL information from Banner (line item accounting).

8. Add an **Attachment** (as required by the expense type and any additional documentation). Hint: Review the Receipt Guide (link to guide) for tips on emailing receipts and using the Snap App to add receipts directly to your **eWallet** in the Mason Finance Gateway.
9. Click **Save** to add the expense to the document. Continue to **Create New Expense**, as desired.

10. Once all expenses have been added to the reimbursement document review the ledger on the left side of the screen. **Note:** If a Warning or Violation is displayed please go back to review and make a correction.

If the report expense contains a Red Triangle, you will not be able to submit. Click on the Transaction to Edit, correct the violation, and then you should see a green check mark and be able to submit.
11. Click **Submit**. Review the certification and then click **Submit** again.

By clicking “Submit,” I hereby certify that I have read, understood, and complied with all university policies. The expenses listed on this reimbursement were incurred by me on official business for the Commonwealth of Virginia and include only such expenses as were necessary to conduct business. These expenses have not been previously claimed nor will they be presented to an organization other than George Mason University for reimbursement.

12. The Document will be routed to the Traveler if submitted by a delegate, then the traveler's Supervisor and the Org Approver. Note: Additional routing is built into the system for OSP, ORIA, and International Tax, and will route accordingly.

For general questions and helpful guides please visit https://fiscal.gmu.edu/mason-finance-gateway/. For assistance utilizing the Mason Finance Gateway please contact mfgadmin@gmu.edu. For questions on travel please contact travel@gmu.edu, for non-travel please contact acctpay@gmu.edu.