Mason Finance Gateway

Guide for business travel and expense reimbursements.

The Mason Finance Gateway (MFG), powered by Chrome River, is our new travel and expense management system for all reimbursements. It replaced the Travel Request System and several manual reimbursement forms in February 2021.

Required Training

All employees are required to complete the Mason Finance Gateway Navigation training prior to using the system. This 30-minute online training provides users with an understanding of how to navigate the new system. To access the training go to https://masonleaps.gmu.edu/ and login with your NetID and password. Locate the training under the "Required Training" tab. Please refer to the Training Guide for assistance.

Benefits of the MFG

- Mobile-friendly application with associated Apps
- Fully Automated, electronic workflow
- Optical Character Recognition (OCR) means less data entry
- Direct upload of receipts from email or Apps
- Integration with Lyft, Uber and more
- Built in compliance rules

After the required training (noted above) we encourage you to review the Getting Started Guide and pre-recorded User Demo for an in-depth overview of the system and instructions for submitting a reimbursement. Additional guides are built into the MFG and can be accessed through *Help Center* (located in the Profile menu) when logged into your account.

The **Submitting Receipts Guide** outlines the various ways to electronically send receipts to your MFG profile and provides information using the Apps.	The **Food and Beverage Reimbursement Guide** provides step-by-step instructions for business meal reimbursements.	The **Student/Non-Employee Guide** provides instruction for reimbursing students, candidates and other non-employees.
The **Delegate Guide** provides instructions on adding or editing a User Delegate or Approver Delegate.	The **Approver Guide** shows you how to approve, return, or reassign a document in the MFG	The **Travel, Meals, and Entertainment Manual** provides a guide to policies and procedures.

For additional user guides and system information please visit **https://fiscal.gmu.edu/mason-finance-gateway/**. If you would like to attend a live virtual training, please register for **Fiscal Administration Session 3** – Expense Reimbursement and the Mason Finance Gateway through Mason Leaps. Questions may be directed to your unit finance administrator or sent to **mfgadmin@gmu.edu**.

Approval Flow

The approvals within the MFG are driven by Banner Finance and the Banner HR database. The listed **Supervisor** is generated from the HR database. Supervisors and Approvers are hard coded into the system and employees do not have the ability to change or add a Supervisor/Approver. For most employee reimbursements, the approval flow will begin with the **Supervisor**. *No user-entered Approver information can be captures for the approval flow.*

- When a **Delegate** submits a reimbursement for a Mason employee. The approval flow will begin with the Mason Traveler then the Supervisor Approver.
- When a reimbursement is submitted for **Adjunct Faculty, GRA/GTA**, **Student or non-Mason individuals**, the approval flow will skip the Supervisor Approver and move straight to the Budget Approver.

In all cases the **Budget Approver** is assigned by the Unit at the Org level 4 (Org L4). In Banner Finance, the Org is used to identify the organizational unit responsible for the financial activity captured within that code. The Banner Finance hierarchy includes Org Levels L1-L6. The Org number that faculty and staff use to charge expenses is Org L6 (example – 421701). All charges posted to an Org L6 roll up and consolidate approval at the Org L4 level (example – 4210). The approval flow in the Mason Finance Gateway for all transactions is designated to the Org L4 Approver assigned by the Unit. This includes grants and other sponsored projects, that roll up to the Org L4. There is not a built-in approval for the PI. However, the Org L4 Approver, assigned by the Dept., can "Reassign" approval to the PI when appropriate.

A Traveler or Delegate will search and select the Org level 6 which identifies the department, office or center on the Allocation list within the MFG. This will populate the full allocation information.

Allocation

10111-421701-60100 Finance Administrative Systems Team Finance Administrative Systems Team / Institutional Sup

10111-421701-60100 **Finance Administrative Systems Team**
Finance Administrative Systems Team / Institutional Support

The Org level 6 (department, office or center) rolls up to the Org level 4 (central unit) for Budget Approval.

For example – a document allocated to 421701 (Org level 6) in the MFG will roll up to 4210 (Org level 4) for Budget Approval as will any other Org level 6 that falls under 4210.

Org L4 Dept ▲	Org L5 Dept Prog ▲	Org L6A ▲	
4210 Fiscal Services	4210A Accounts Payable	421001	Accounts Payable Department
		421003	State Loan
		421006	Miscellaneous Advances
	...iscal Services Admin	421108	Student Accounts
		4211AA	Cash Office and ALM
	4211B Student Fsc Sv... ...ts	421105	Collection Fees
		421111	Attorney General Collections
		421112	Debt Set-off Collections
	4213A Fiscal Services Administration	421301	Fiscal Services Office
		421302	FOCUS Conference Mason Host
		421303	Bequests
	4214A General Accounting	421401	General Accounting Department
		421409	Cardinal System
	4215A Purchasing	421501	Purchasing Office
		421504	eVA
		421505	Public-Private Education Act (PPEA)
	4217A Finance Administrative Systems Tea...	421701	Finance Administrative Systems Team