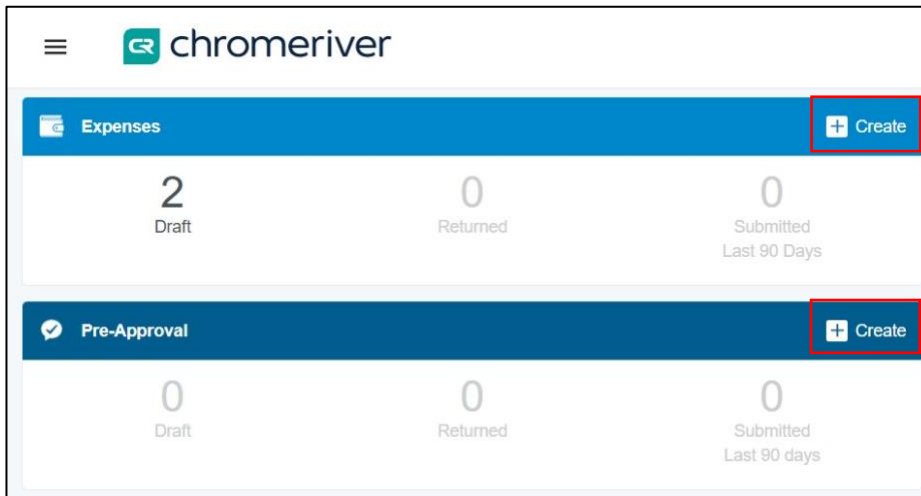


The Mason Finance Gateway, powered by Chrome River, is our new expense management system. It replaces the current Travel Request System and several manual reimbursement forms (Food & Beverage, Payment Request) that were previously submitted for reimbursement and processed through Accounts Payable.

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.

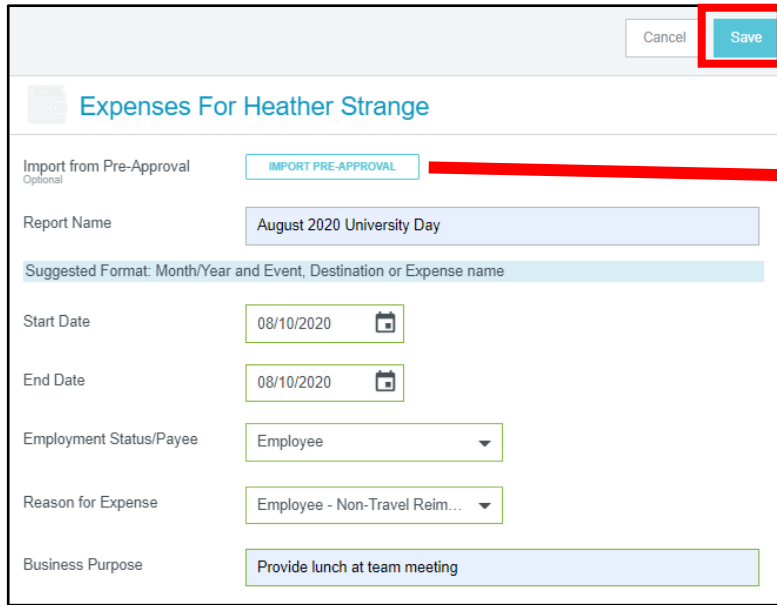
Getting Started

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**

Getting Started – Mason Finance Gateway



Expenses For Heather Strange

Import from Pre-Approval

Report Name: August 2020 University Day

Suggested Format: Month/Year and Event, Destination or Expense name

Start Date: 08/10/2020

End Date: 08/10/2020

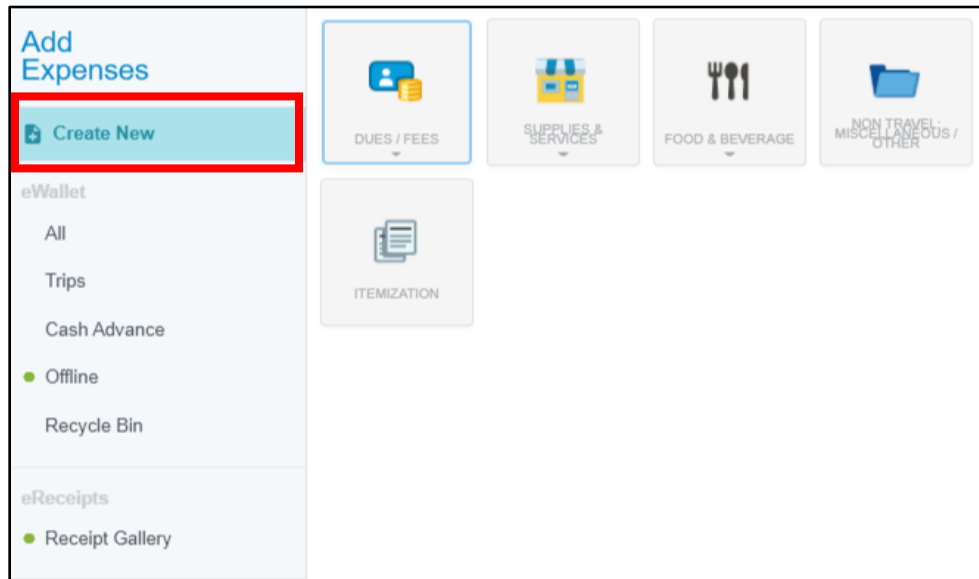
Employment Status/Payee: Employee

Reason for Expense: Employee - Non-Travel Reim...

Business Purpose: Provide lunch at team meeting

Only click "Import Pre-Approval" if one has already been created and you are now submitting a reimbursement for pre-approved travel expenses.

- 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.



Add Expenses

DUES / FEES

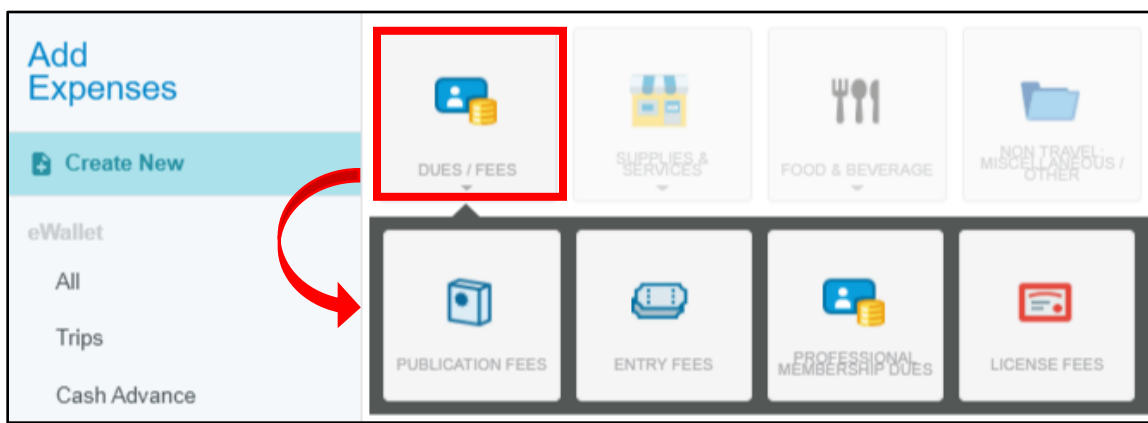
SUPPLIES & SERVICES

FOOD & BEVERAGE

NON TRAVEL MISCELLANEOUS / OTHER

ITEMIZATION

- 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.*



Add Expenses

DUES / FEES

SUPPLIES & SERVICES

FOOD & BEVERAGE

NON TRAVEL MISCELLANEOUS / OTHER

PUBLICATION FEES

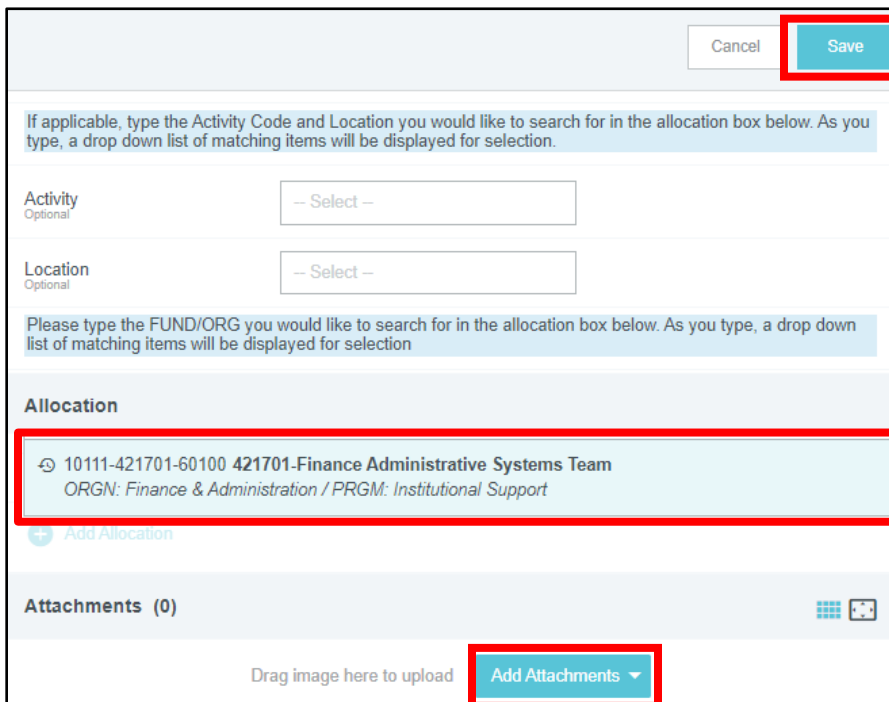
ENTRY FEES

PROFESSIONAL MEMBERSHIP DUES

LICENSE FEES

- 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 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).
- 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).
- 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.

- Click **Save** to add the expense to the document. Continue to **Create New Expense**, as desired.



Cancel Save

If applicable, type the Activity Code and Location you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection.

Activity Optional -- Select --

Location Optional -- Select --

Please type the FUND/ORG you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

Allocation

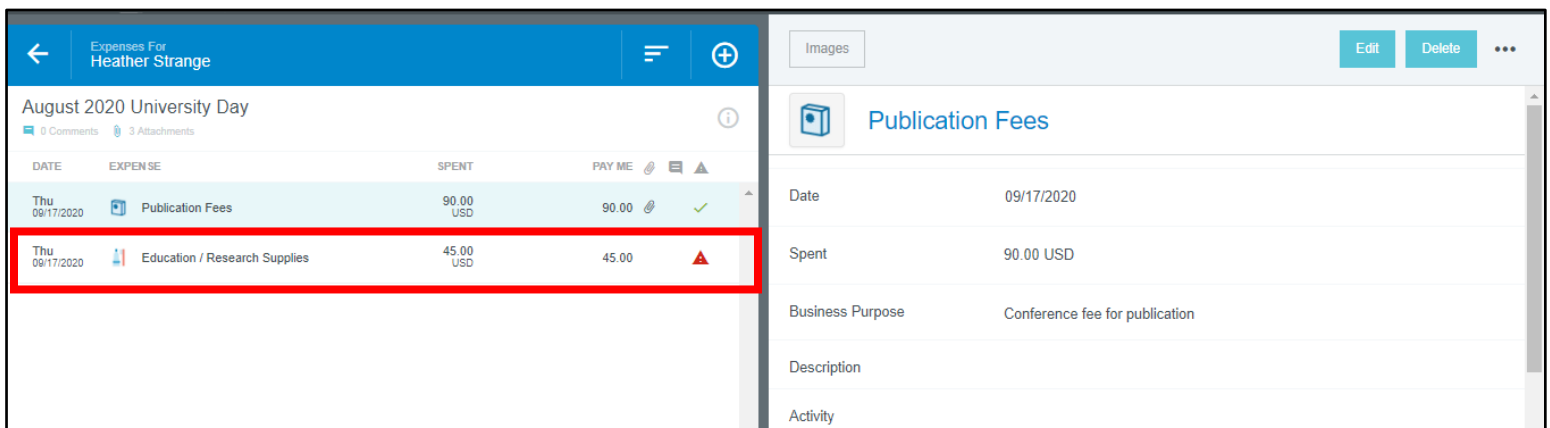
10111-421701-60100 421701-Finance Administrative Systems Team
ORGN: Finance & Administration / PRGM: Institutional Support

Add Allocation

Attachments (0)

Drag image here to upload Add Attachments

- 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.*



DATE	EXPENSE	SPENT	PAY ME
Thu 09/17/2020	Publication Fees	90.00 USD	90.00 ✓
Thu 09/17/2020	Education / Research Supplies	45.00 USD	45.00 ⚠

Publication Fees

Date: 09/17/2020

Spent: 90.00 USD

Business Purpose: Conference fee for publication

Description:

Activity:

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.

Submit Confirmation

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 travelers 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.