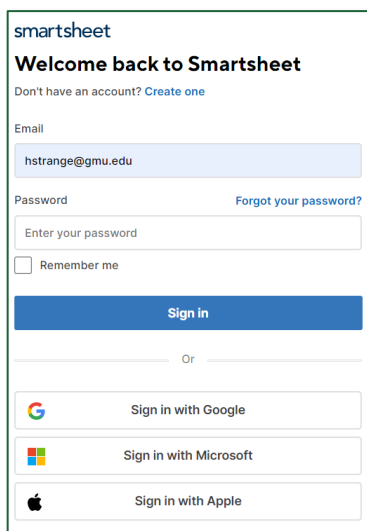


Smartsheet for Reconciliation Certification

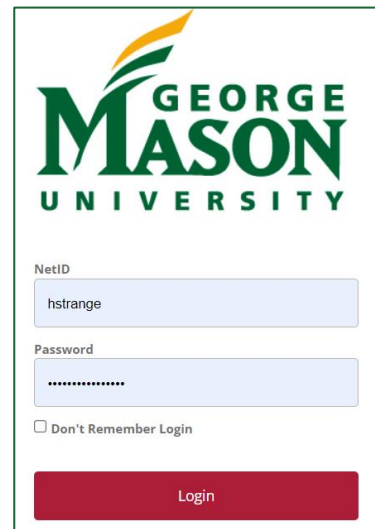
All Financial Transactions must be the result of official university business and/or agency transactions. Policy 2114 - Financial Management covers basic financial accountability and reconciliation practices. Units should follow the [Reconciliation Procedures](#) to maintain consistent financial management practices and timely reconciliation. Certification is recorded on the assigned Smartsheet. The steps to login and access the free Smartsheet application are located below.

Login and Locate

1. Open the [Smartsheet](#) application. Enter your Mason email address (@gmU.edu) and then select “Sign in with Microsoft”. You will be prompted to continue to the Mason Federated Login. Enter your Patriot password to continue and authorize with [2FA](#). (Note: You may be asked to accept the Terms of Service.)

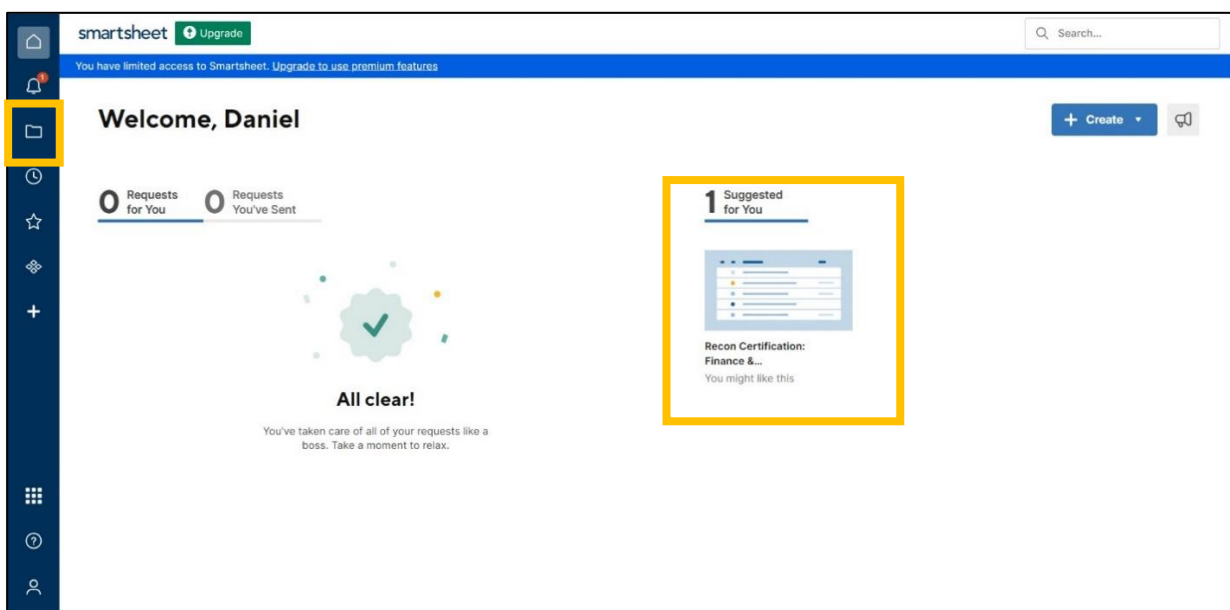


The image shows the Smartsheet login interface. At the top, it says "Welcome back to Smartsheet" with a link to "Create one" for new users. Below this are fields for "Email" (containing "hstrange@gmu.edu") and "Password" (with a "Forgot your password?" link). There is a "Remember me" checkbox and a blue "Sign in" button. Below the sign-in button, there are three social login options: "Sign in with Google", "Sign in with Microsoft", and "Sign in with Apple".

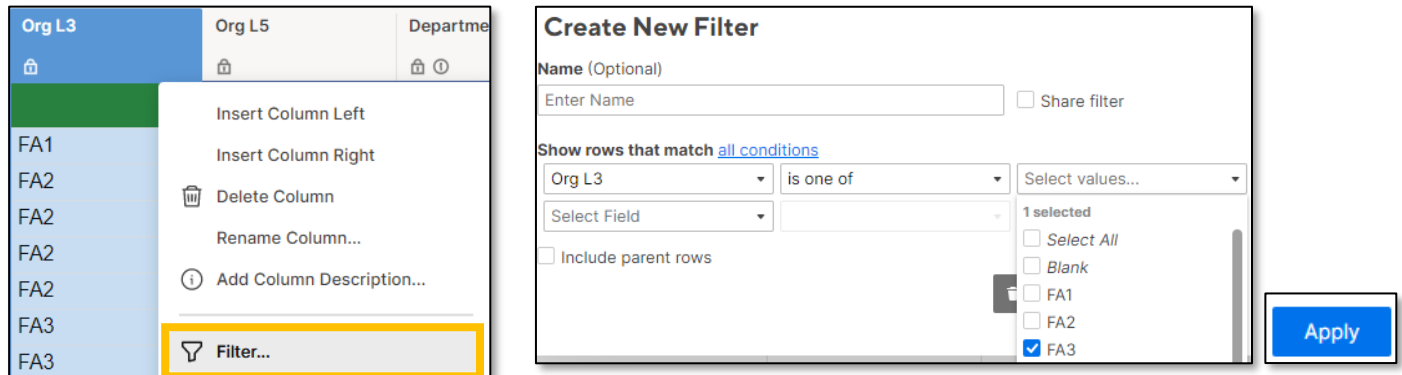


The image shows the Mason Federated Login page. It features the George Mason University logo at the top. Below the logo are fields for "NetID" (containing "hstrange") and "Password" (masked with dots). There is a "Don't Remember Login" checkbox and a red "Login" button at the bottom.

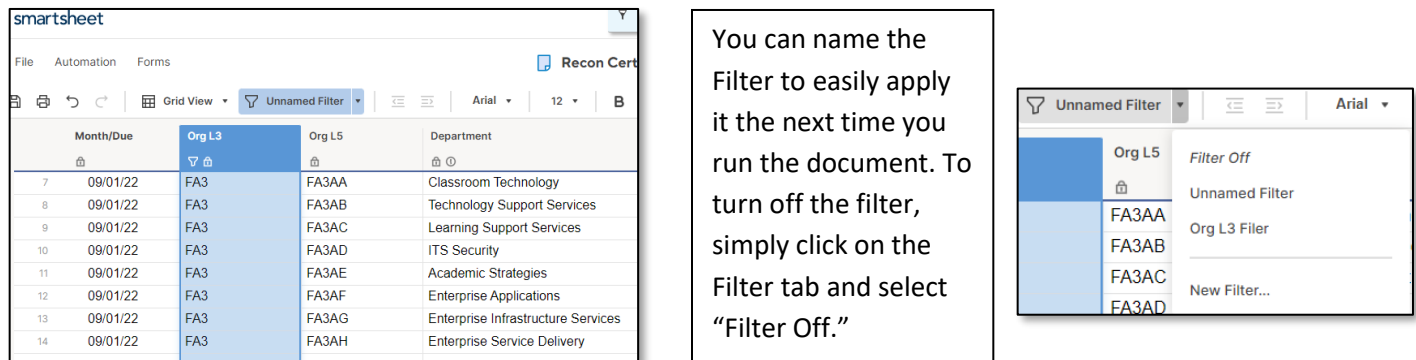
2. Once you are logged in, you will see the Smartsheet(s) that you have permission for under “Suggested for You.” Click on the appropriate sheet to open the document and perform your required actions. You can also view all your documents from the left side menu by clicking on the file folder icon.



- While changes are available in real time, Smartsheet does **not** autosave and you need to click the floppy disk icon to save. Be very careful not to override other departments data and only enter data for your assigned actions.
- To quickly locate your department data, you can apply a “filter” to the Org L3 or Org L5 columns. Click on the column heading and then choose “Filter.”



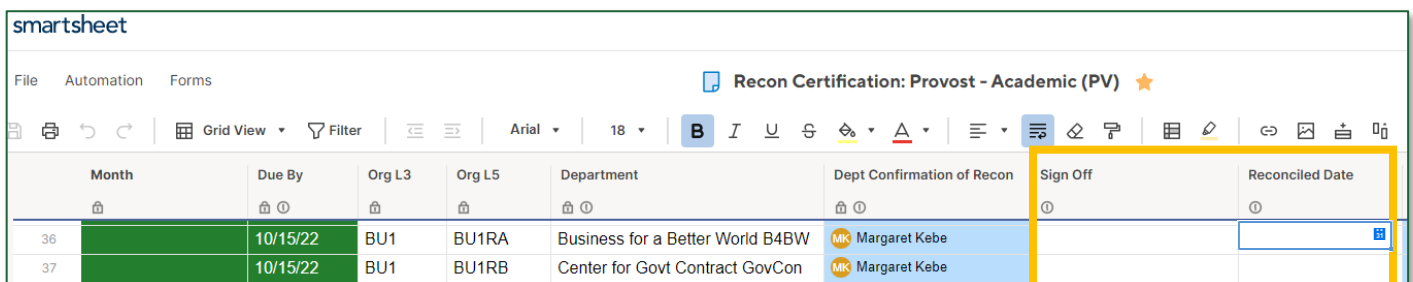
- You should see only the values you selected when creating the filter. *The filtered view will only be visible to you and will not change the organization of the Smartsheet.*



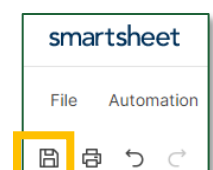
You can name the Filter to easily apply it the next time you run the document. To turn off the filter, simply click on the Filter tab and select “Filter Off.”

Reconciler Steps

- Review and apply the Reconciliation Procedures.
- Complete the reconciliation.
- Login to [Smartsheet](#) and locate your assigned Org L5.
- Type your name into the “Sign Off” column to signify that the reconciliation has been completed for the Org L5. Then, add the “Reconciled Date” by clicking on the calendar icon within the field. Complete this step for all Org L5s to which you have been assigned as the Reconciler.

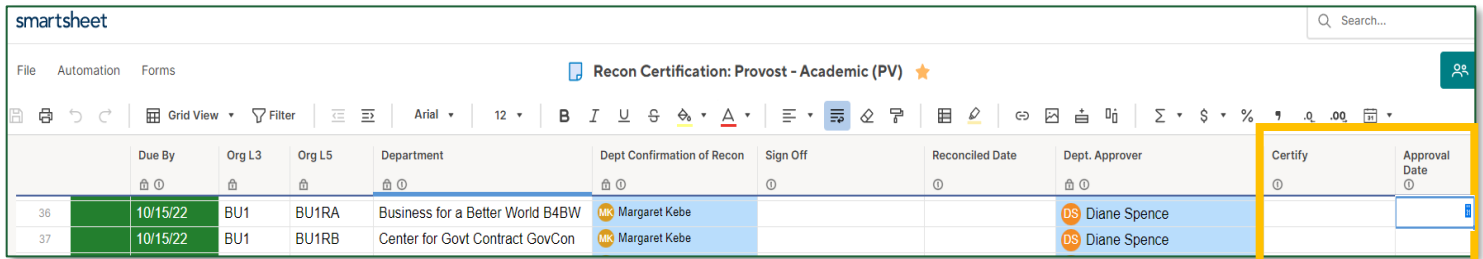


- Click the **Save** icon on the top menu to complete your actions.
- Notify the named Approver that the reconciliation is ready for review and approval.



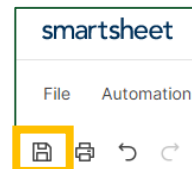
Approver Steps

1. Review and complete the Approver steps from [Reconciliation Procedures](#).
2. Complete the reconciliation.
3. Login to [Smartsheet](#) and locate your assigned Org L5.
4. Type your name into the “Certify” column to signify that the review has been completed and approval is authorized for the Org L5. Then, add the “Approval Date” by clicking on the calendar icon within the field. Complete this step for all Org L5s to which you have been assigned as the Approver.



	Due By	Org L3	Org L5	Department	Dept Confirmation of Recon	Sign Off	Reconciled Date	Dept. Approver	Certify	Approval Date
36	10/15/22	BU1	BU1RA	Business for a Better World B4BW	Margaret Kebe			Diane Spence		
37	10/15/22	BU1	BU1RB	Center for Govt Contract GovCon	Margaret Kebe			Diane Spence		

5. Click the **Save** icon on the top menu to complete your actions.
6. The Reconciliation is not complete until Approved.



Please contact fscomm@gmu.edu for questions related to the Reconciliation process. To sign up for a walk-in session and receive individual assistance please reserve a timeslot at <https://fiscal.gmu.edu/event/fairfax-walk-in-hours/>. For specific questions about Smartsheet access please contact hstrange@gmu.edu.