Student and Non-Employee Reimbursement

Student, candidate, and other non-employee reimbursements are processed through the Mason Finance Gateway. All payees must have a G number in order to receive reimbursement. Students, candidates and other non-employees do not have access to the system. Mason users will complete a reimbursement on their behalf by selecting *Student or Candidate/Non-employee* on the Expense Report, searching for their G number, adding reimbursable expenses, and uploading receipts. Reimbursements are routed directly to the Org Approver, and when applicable to the International Tax Office, Office of Sponsored Programs, and/or the Office or Research Integrity and Assurance.

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. *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.** Pre-Approval is not required for students, candidates or non-employees.

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 Student or Non-Employee (Answer additional questions for Non-Employee Reimbursements)
   d. *Payee Student/Non-employee*: Search for G# or name
   e. *Reason for expense*: Select the appropriate category (Travel or Non-Travel by employment status)
   f. *Enter Country* (if applicable), *Enter Destination* (if applicable)
   g. *Enter Business purpose*- Enter detailed description of the nature of the charges. Click **Save**

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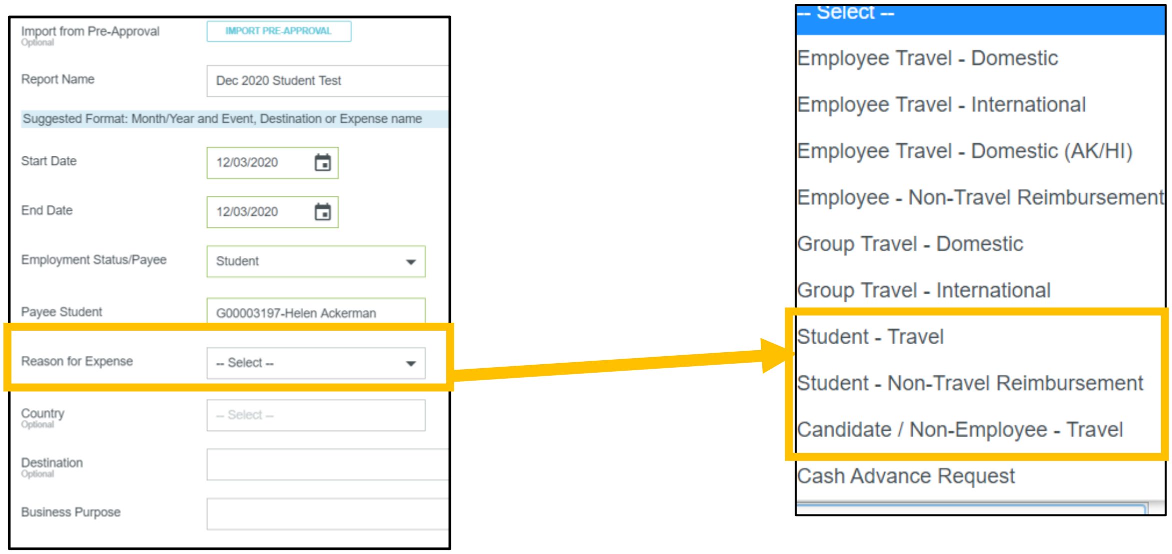
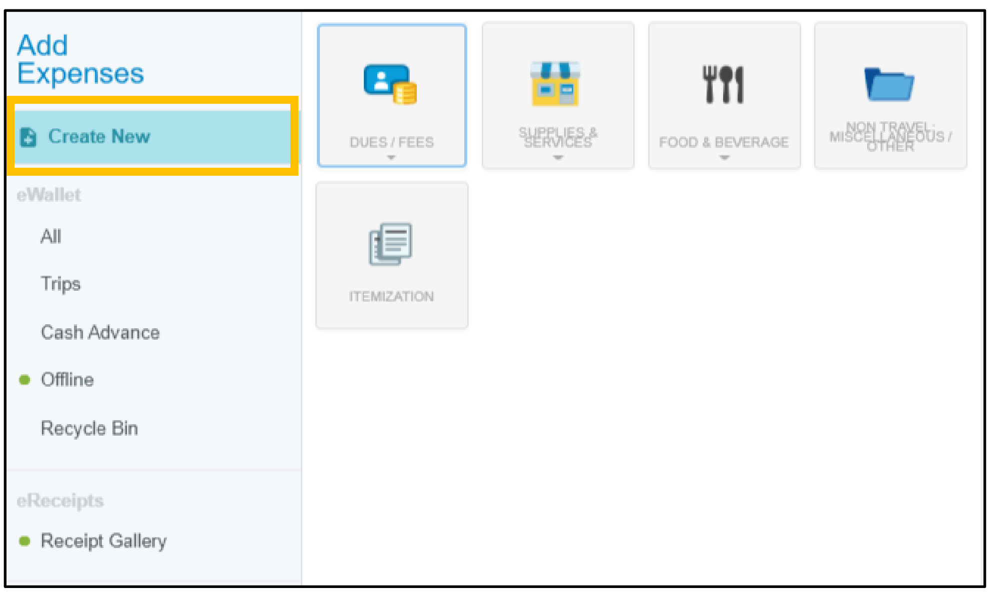
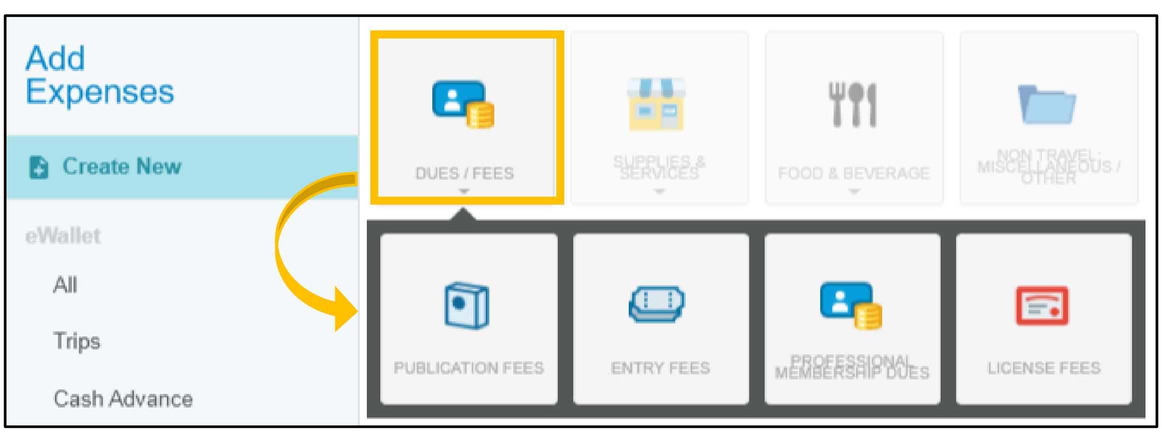


4. Under **Add Expense**, click **Create New.** Expense tiles will display based on the selected *Reason for Expense.* For example, when Student Non-Travel is selected, you will not see any Travel Expense tiles to select.

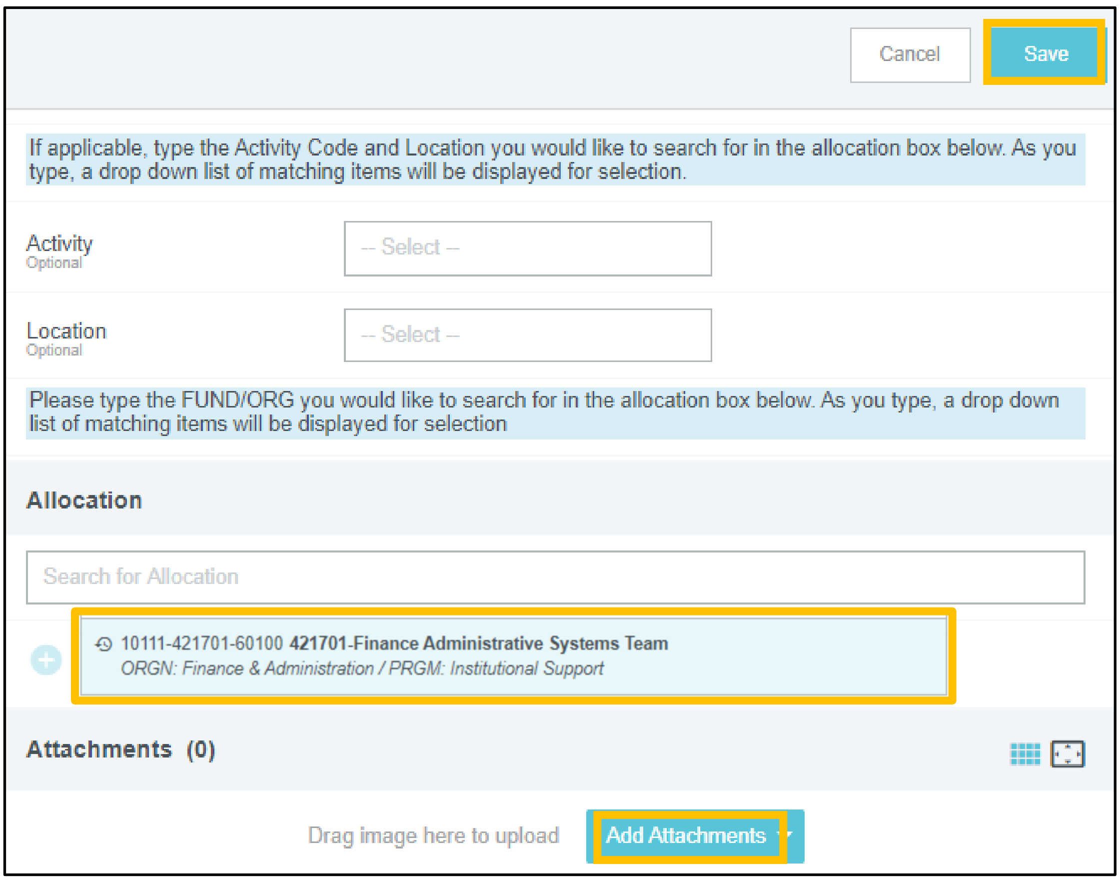


5. Specific expense types are grouped together under a main tile. Clicking on a tile, will show more specific expense types if applicable. *Note: Each expense tile is tied to an account code in Banner. Click here for Tile Guide.*



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 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 for tips on emailing receipts and using the Snap App.

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



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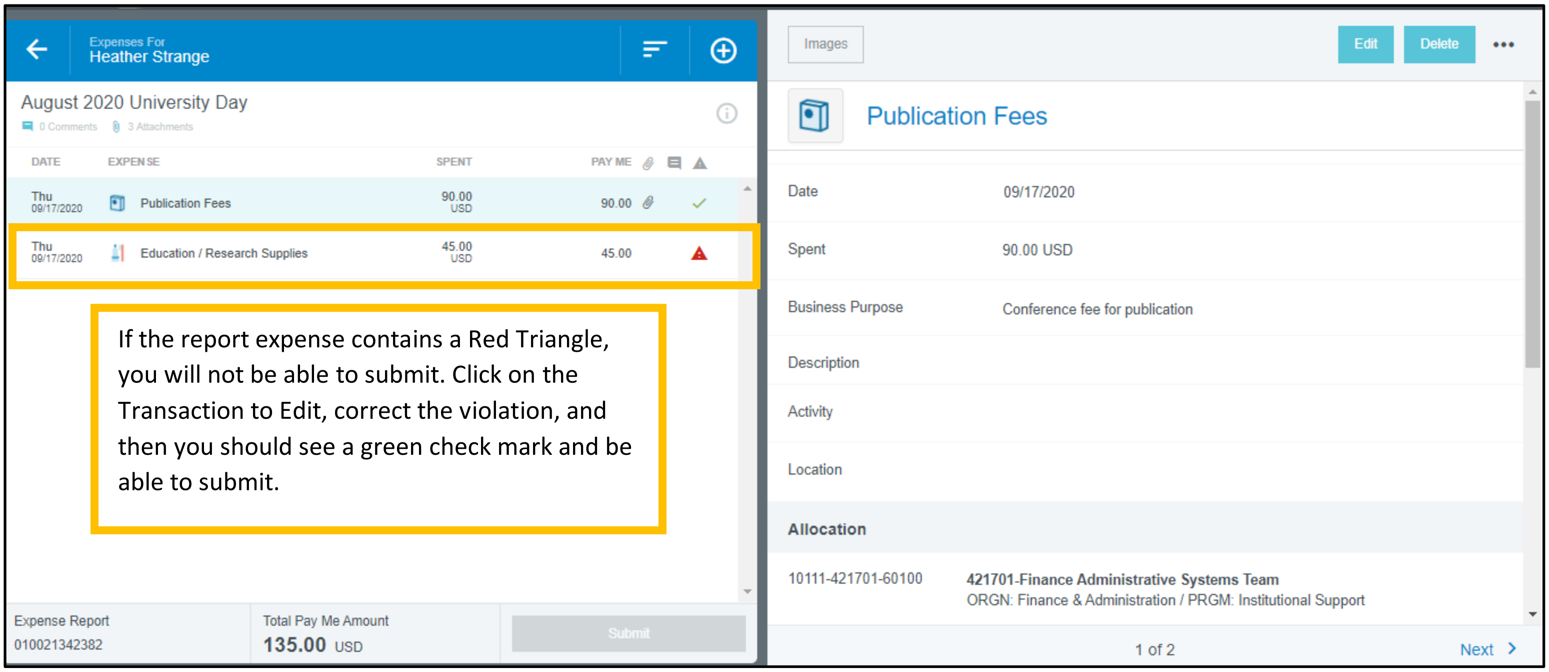
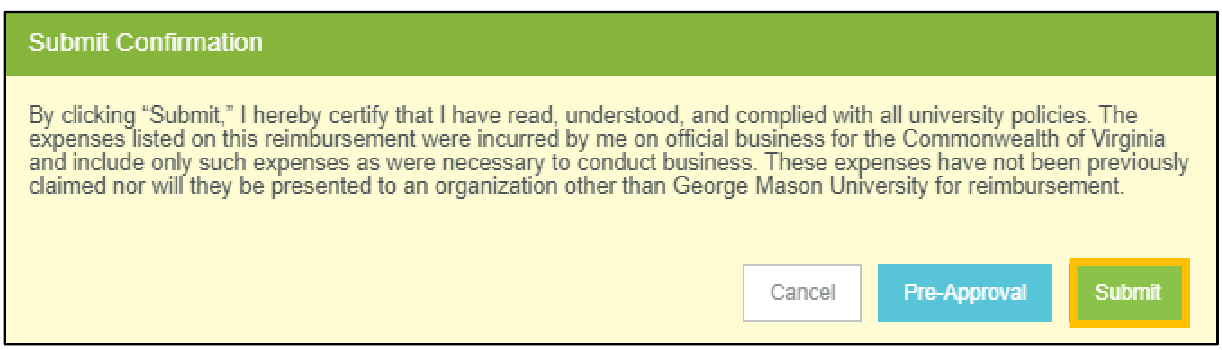
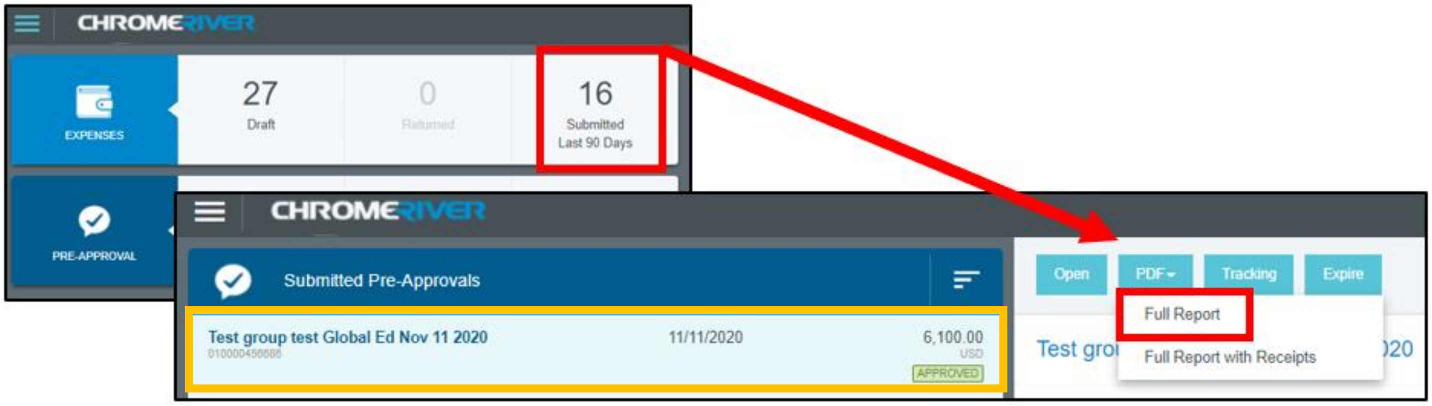
10. Once all expenses have been added to the reimbursement document review the ledger on the left side of the screen. *Note: If a Warning or Violation is displayed please go back to review and make a correction.*



11. Click **Submit**. Review the certification and then click **Submit** again.



12. The Document will be routed to the Org Approver. *Note: Additional routing is built into the system for OSP, ORIA, and International Tax, and will route accordingly.*
13. Once approved, the department should send a copy of the reimbursement request to the student or non-employee for their records. To access the PDF, login to your profile, go to Submitted Expenses, and click on the reimbursement title. You may save the report to your computer and email to the recipient.



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.