

Travel, Meals, and Entertainment Manual

Prepared by Fiscal Learning & Engagement



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Policy Introduction

George Mason University employees have a public obligation to ensure that all expenditures are essential, reasonable and support the mission of the university. Expenses incurred on behalf of the University must be consistent with the university mission, performed in an economical manner, and not exceed the limitations imposed by Mason. The [Travel, Meals and Entertainment Policy](#) outlines the requirements and responsibilities for necessary business expenses. This guide has been prepared as a resource for individuals traveling on official business, planning events where food or beverage will be served, or hosting candidates and other guests.

*Note: Policies, procedures and reimbursable amounts reflect Commonwealth of Virginia and George Mason University policies. Each unit, at the discretion of management, may require additional approvals and/or limit reimbursable amounts. These additional provisions must be applied uniformly to a class of employee (e.g., all employees or all faculty). For example, a unit may limit mileage reimbursement to overnight travel, limit meal reimbursement to actual expenses (up to the guideline amounts) or not reimburse renewal fees. Please note that passport fees are **not** reimbursable.*

Expense Management – Payment Types

The preferred payment method for business expenses is to use a P-Card (\$5,000 or less) or process a purchase order through eVA procurement (over \$5,000). To limit out-of-pocket business expenses, airfare/rail tickets, conference registration fees, on-campus catering, business meals, and supplies (food/drink) may be paid with a P-Card or eVA procurement. For more information on P-Card and eVA purchasing, please visit the [Purchasing](#) webpage.

Travel Charge Card

An option for full-time employees to limit out-of-pocket expenses is to obtain a Travel Charge Card. This is an individual liability card that may be used to pay for all personal business travel expenses including airfare, hotel, meals, and transportation. The cardholder is responsible for the monthly payment of this card and should submit a reimbursement in a timely manner in order to make the monthly payment on time. Traveler will only be reimbursed after the trip, regardless of how far in advance the expenses are purchased. For more information on the Travel Charge Card, please visit the [Travel](#) webpage.

Travel Agency

Mason has contracts with Covington Travel to assist with business travel planning and to reduce out of pocket expenses. A fee will be added to the cost of each airline ticket or service purchased. Please visit the [Pay for Travel](#) webpage to learn more.

Motor Pool

Mason Parking and Transportation has partnered with Enterprise Rent-a-car to provide short term rental cars for university business with no out of pocket expense. Prior to making a reservation, employees must receive training and meet eligibility requirements. Expenses for car rental and fuel may be billed directly to the department. Please visit <https://transportation.gmu.edu/motor-pool/> for more information on this option.

Sodexo On-Campus Catering

Sodexo is our on-campus catering partner. Services may be procured through [CaterTrax](#) and billed directly to the department Org. A P-Card is not required and authorization for services occurs within CaterTrax.

Reimbursements

Employees may incur travel and food-related out of pocket expenses when a Mason payment method is not available or applicable to the expense. A list of other reimbursable expenses is available here:

<https://fiscal.gmu.edu/accountspayable/reimburse-employees/> Out of pocket expenses do not include expenses paid with rewards points, only expenses paid in currency are eligible for payment. Pre-Approval or authorization from the department should be obtained prior to incurring out of pocket expenses to ensure that reimbursement will be permitted. All reimbursement requests must adhere to the policy and procedures noted and be submitted through the Mason Finance Gateway.

Food and Beverage Basics

As an Agency of the Commonwealth of Virginia, George Mason University has a public obligation to ensure that all expenditures are essential and reasonable and that they support the mission of the university. As such, state rules prohibit expenditures for employee personal expenses, including meals, snacks, entertainment, and refreshments. There are limited circumstances in which it is considered appropriate to provide food and beverages to personnel who are not in travel status. Food/Beverage may not be provided at regularly scheduled or routine meetings (i.e., monthly staff meeting, quarterly unit meeting) or as a way to boost morale or promote goodwill among employees. Alcohol and Flowers are prohibited. Participant Funded events, where the food/beverage costs are paid solely from participant fees (i.e., registration fee) are not subject to the policy.

All food and beverage purchases are limited to the per meal dollar maximum for the location (which includes applicable tax and tips - up to 20% - or service fee). Maximum amounts per person are limited to one-and-a-half times the per diem meal allowances for travel. All rates are available on the [GSA Per Diem](#) webpage. Local area rates are listed below.

October 1st, 2022 – Current

Washington Metro (Arlington/Fairfax)	Prince William County (SciTech)	Loudoun County
Breakfast - \$27.00	Breakfast - \$19.50	Breakfast - \$24.00
Lunch - \$30.00	Lunch - \$22.50	Lunch - \$25.50
Dinner - \$54.00	Dinner - \$39.00	Dinner - \$46.50

Types of Food and Beverage Expenditures

There are three basic types of food purchases that occur at Mason: catering, business meals, and supplies/food and drink. The preferred payment method for food and beverage expenditures is the P-Card.

Non-Travel meals must adhere to the procedures noted below. Please visit the [Food and Beverage Overview](#) for the most up to date information.

Catering

Catering is the activity of providing food and drink for a group of people, with services such as setup, staffing, and cleanup included. All catering must be paid with a [P-Card](#) and/or [eVA](#) purchase order or through Catertrax. Use of personal funds for catering is not a reimbursable expense. Food that is delivery only, such as pizza, sandwich boxes, etc. and food that is picked up at a restaurant and brought to campus for consumption is not considered catering (see Business meal below). Please utilize an Approved Caterer for all on-campus activities. Units are prohibited from cooking/preparing raw food for events (i.e., cookouts, grilling foods).

Catering Examples

- Hiring a food establishment or catering company to serve and staff an event on or off-campus.
- Hosting an event where a food establishment or catering company prepares food off-site, delivers to campus, and sets up a “buffet” style luncheon with no staffing.

Catering under \$5,000 may be paid with a [P-Card](#) and/or eVA purchase order. A temporary P-Card lift may be requested using the P-Card Maintenance Form (add a space for business purpose). In Bank of America Works the itemized receipt, list of attendees/affiliations must be attached to the transaction. A comment, explaining the business purpose must be entered. If a list of attendees/affiliations is not practical a statement of impracticality must be noted in the comments as well. Please also note if the event is Participant Funded and not subject to the policy. Catering may also be procured through [eVA](#). Catering is tax exempt and units must ensure that tax is not charged. Click here for the [Tax Exemption](#) form.

External Catering over \$5,000 must be submitted through [eVA](#) and may not be paid with a P-Card or reimbursed. A comment explaining the business purpose and the tentative list of attendees/affiliations or statement of impracticality must be attached to the purchase requisition (REQ). The vendor or Mason contact must submit the invoice to acctpay@gmu.edu in order to receive payment.

Internal - Sodexo Catering (any dollar amount), should be procured through [CaterTrax](#) and billed directly to the department fund/org. The list of attendees/affiliations or a statement of impracticality must be attached to the request in [CaterTrax](#). Note in [CaterTrax](#) if event is the event Participant Funded and not subject to the policy.

Business Meals

Business meals (include Business Functions, Internal Trainings, Other Internal events, Student Academic events, Student Club events, Student Athletic events, ICA team functions, RA/RD required activities). Business meals are defined as a meal provided at a commercial dining establishment open to the general public, or at a university location as long as no service other than delivery/pickup is provided. A business meal may occur in travel or non-travel status.

Examples:

- You and a group of colleagues take a job applicant out to lunch as part of their interview itinerary.

- You take a colleague to dinner while at a conference to discuss business related topics. If expensing a business meal while traveling, the meal must be claimed instead of a per diem or actual travel meal.
- Meals with a guest speaker and other attendees.
- Department training or retreat that lasts longer than 4 hours.
- Committee meetings and/or working groups when employees are required to work during their meal period. (Food is generally brought into the workplace and should be economical).
- Student function hosted by the university and focused on students. *Cannot be an employee function where students are present.*

P-Card for Business Meals (in restaurants, pick up or deliver). A temporary [P-Card](#) lift may be requested using the [P-Card Maintenance Form](#). When allocating in Bank of America Works, the itemized receipt and list of attendees/affiliations must be attached to the transaction. A comment, explaining the business purpose must also be entered. If a list of attendees/affiliations is not practical a statement of impracticality must be noted in the comments as well. Please also note if the event is Participant Funded and not subject to the policy. No tax should be charged when using a P-Card. Click here for [Tax Exemption](#) form. Cardholders should discuss the tax exemption requirements with vendors prior to making purchases.

Reimbursements – Business Meal reimbursements must be processed through the Mason Finance Gateway. The business purpose must be entered to explain the purchase. The itemized receipt/proof of purchase, and list of attendees/affiliations must be attached to the request. Individuals should always seek approval from their department prior to incurring a business meal expense. Every effort should be made to purchase with a P-Card. Please see the Food & Beverage Reimbursement guide in the Appendix.

Supplies Food/Drink

Supplies Food/Drink is the purchase of pre-packaged food, drink and meal supplies, such as plates, cups, napkins for an on-campus event. These purchases do not include any vendor-provided services or food delivery. Most supplies food/drink purchases will be made at grocery or general merchandise stores.

Examples:

- Packaged snack and drink selection for student consumption as part of a Mason hosted event.
- Purchasing bottled water, paper products, and coffee for public consumption. **May not be located in a private office or suite accessible by staff only.*

P-Card for Supplies food/drink (i.e., grocery or general merchandise store). A [P-Card](#) 'lift' is not required for grocery or general merchandise stores. In Bank of America Works, the itemized receipt must be attached to the transaction. A comment, explaining the business purpose must be entered. Please also note if the event is Participant Funded and not subject to the policy. No tax should be charged when using a P-Card. Click here for [Tax Exemption](#) form. Cardholders should discuss the tax exemption requirements with vendors prior to making purchases.

Reimbursement: Supplies food/drink reimbursements must be processed through the Mason Finance Gateway. The business purpose must be entered to explain the purchase. Individuals should always seek approval from their department prior to incurring a business meal expense. Every effort should be made to

purchase with a P-Card or Purchase Order. Please see the Food & Beverage Reimbursement guide in the Appendix.

Business Travel Basics

The first step for business travel is pre-trip planning. The traveler and/or delegate must research the available transportation and lodging options prior to travel. The most economical means of travel should be evaluated and the following items should be considered when planning a trip:

- Reason (business purpose) for Travel
- Dates of travel
- Destination(s)
- Transportation method(s)
- Lodging requirements
- Registration fees
- Meals
- Other anticipated requirements and expenses

When the total cost of an employee's domestic trip is expected to exceed \$1,000 or is to an International destination a Pre-Approval is required in the Mason Finance Gateway.

Formal Pre-Approval is *not required* for:

- Employee domestic travel expenses that are expected to be under \$1,000
- Non-employee/student travelers (pre-approval for non-employee/student is not required).
- Food, beverage and entertainment expenses

However, verbal or informal approval should always be obtained prior to incurring expenses on behalf of Mason. If the department requires pre-approval for Non-Employee or Student then it will need to be created under an employee's profile and attached as a receipt post-trip.

Unallowable Expenses

The following list of common expenses are not reimbursable. *The list is not all-inclusive.*

- Passport fees
- Lost or stolen articles
- Alcoholic beverages
- Excessive meal and lodging charges
- Personal telephone calls *
- Personal laundry expenses *
- Damage to personal vehicles, clothing or other items
- Expenses related to personal negligence of the traveler, such as fines
- Services to gain entry to locked vehicles
- Towing charges
- Insurance associated with rental cars in the United States
- Luxury vehicle rentals
- Excessive parking and gasoline charges
- Prepaid fuel agreements
- Fuel charges from car rental agencies
- Mason parking fees
- Expenses paid by reward points or airline miles
- Movies charged to hotel/motel bills
- Expenses for children, spouses and other non-business companions
- Local commuting expenses
- Service fees and tips (e.g., to baggage handlers)
 - * These expenses are covered by the incidental portion of the per diem payment.
- Airline seat upgrades or early boarding fees,
- Travel between lodging and places where meals may be taken
- Travel insurance (personal injury or loss, trip interruption/cancellation, etc.)
 - *Travel accident and emergency insurance coverages is available for employees (covered cost). Additional*

information is available at
<https://risk.gmu.edu/insurance/>.

International Travel

All international travel requires a Pre-Approval submitted in the Mason Finance Gateway and approved by the traveler's Supervisor and the associated Budget Approver prior to travel. Faculty and staff members traveling to an international destination(s) where credit cards are not accepted may qualify for a Travel Advance. Please review the [Individual International Travel Advance](#) instructions or contact the [Travel Office](#) for guidance.

The Office of Research Integrity and Assurance (ORIA) must approve, in advance, when international travel is:

- To a comprehensively embargoed country (e.g., Cuba, Iran, North Korea, Sudan, the Crimea region of Ukraine and Syria).
- To a militarily embargoed country (list of these countries available at: http://pmddtc.state.gov/embargoed_countries/) for a traveler who works with data controlled by the International Traffic in Arms Regulations (ITAR).

The University Travel Advisory Committee (UTAC) must approve, in advance, when international travel is to countries or areas under U.S. Department of State Travel Advisories Level 3 and 4, Centers for Disease Control and Prevention (CDC) Level 3 warnings or countries under comprehensive economic sanctions per <https://www.gmu.edu/safe-return-campus/travel>. Departments intending to invite residents of foreign countries to travel at the university's expense must consult with the International Tax Office (inttax@gmu.edu) *before inviting the individual to travel or making any travel preparations* on the visitor's behalf.

Fly America Act

When federal funds are used, provisions of the Fly America Act (FAA) are applicable and international travel is restricted to a U.S. air carrier unless circumstances meet the qualifications for a waiver. All waivers must be documented on the [Certificate of Exception to Fly America Act](#) form. This form must be submitted with the Expense document, attached to an invoice approval if traveler was billed or submitted to the Office of Sponsored Programs if airfare was purchased on a P-Card. Please use the [Fly America Act Decision Tree](#) **prior to booking** international travel. For more information on DOD funded travel, the Fly America Act and Open Skies agreement with EU, Japan, Switzerland and Australia please visit <http://osp.gmu.edu>.

Local Travel

Non-commuting travel expenses may be reimbursed when individuals must travel in the local area on official business. Normal commuting mileage and expenses are not reimbursable; only the net additional mileage or expenses may be claimed. An employee is generally not reimbursed for lodging within 25 miles of their work place, office or official station. If extenuating circumstances and budget permit, an employee may request an exception and obtain **advanced approval** for lodging in the local area. A Pre-Approval, approved by the traveler's Supervisor and Budget Approver, may be submitted to the Travel Department for consideration. To request an exception please contact the Travel Office at least **14 days prior** to reserving local area lodging for an employee. **No approval will be given after the trip has taken place.**

Mason Guests and Candidates

Local area lodging may be paid for guests of the university (e.g., employment candidates, guest speakers) who are traveling to a Mason campus for university business. Contracts with local area hotels are listed on the [Travel Office Lodging](#) webpage. Visitors are limited to the appropriate local contracted hotel/motel rate when, in special situations, they obtain their own lodging.

Group Travel

Occasionally, faculty or staff members may supervise a group of students on a university-sponsored activity that requires travel outside of the local area. Group travel may qualify for a Travel Advance to reduce out of pocket expenses when authorized by the unit. In these situations, the faculty or staff member should review the [Group Travel Advance](#) and the [International Group Travel checklist](#) for guidance. Travel involving Mason employees only, does not qualify as group travel and individual travelers will be responsible for their own business travel expenses. The Travel Advance may be used to pay out-of-pocket travel expenses that are unallowable on a Mason P-card or are unable to be directly billed to Accounts Payable. The incurred expense(s) must be considered reimbursable under the policy.

Personal Travel Mixed with Business Travel

Occasionally an employee may take a trip that includes both personal and business travel or the trip may originate/culminate at a location, other than the base location, due to personal reasons. When personal and business travel is combined, the traveler may only be reimbursed for expenses equal to or less than the cost incurred if originating/culminating at the traveler's base location (excluding personal travel). In addition, when the cost of the additional personal travel exceeds the business travel expense, travelers may not use any form of Mason payment (Mason P-Card or Travel Agency billing). The traveler is required to add an annotation in the "comments" section of the Pre-Approval and Expense Report that the trip includes both personal and business travel. Specific dates of personal travel must be noted. Specific instructions are available in the [Personal Travel with Business Travel Guide](#) in the Appendix.

Candidates/Non-employee Travel

A department hosting an interview candidate or non-employee for a Mason sponsored event are encouraged to arrange for the traveler's transportation and lodging to be billed directly to the university. Direct billing for transportation is available by using the P-Card or by using Covington Travel reservation and ticketing service by phone.

Direct billing for the traveler's lodging is also available. The Purchasing Department has negotiated contracts with several hotels in the local area. Sponsoring departments are encouraged to make guest lodging arrangements with one of these hotels to obtain favorable rates and direct billing to the university. An updated list of hotel accommodations is available on the *Fiscal Services* web site at [Lodging in the Local Area](#). Additional information may be obtained from the Purchasing Office at 3-2580.

Candidates may also make their own transportation and lodging arrangements. Reimbursement will be made after the trip has occurred. Candidates should be informed that receipts for transportation expenses are required for reimbursement. When a candidate purchases airline tickets via the internet, he/she must submit the confirmation document generated at the end of the on-line reservation process that confirms the cost of the flight as well as the class of service.

Special Accommodations

Mason complies with the Americans with Disabilities Act (ADA). The Office of Compliance, Diversity and Ethics must certify travelers requiring special accommodations due to physical or other disabilities **prior to** making trip arrangements. Approval should be granted from George Mason University's ADA Coordinator via email, and provided with receipt documentation for the travel expense that requires accommodation.

Travel Expenses and Dollar Limitations

Mason has established dollar limitations on certain categories of travel expenses as indicated in this section. **Travelers will not be reimbursed for amounts in excess of these limitations.**

Lodging Rates

Necessary and reasonable lodging expenses for business trips outside of the local area are paid by the traveler and may be reimbursed after trip completion. Lodging rates are governed by the U.S. General Services Administration (GSA). The listed rates assume single occupancy and exclude applicable taxes. Lodging taxes are reimbursable but are not included in the base or allowable rate restrictions. The base rate may be doubled (base rate x 2) as appropriate and approved by the department Budget approver. Amounts above 200% of the base rate (base rate x 2) will not be reimbursed.

Lodging rates are pre-loaded into the Mason Finance Gateway for domestic and international locations. Travelers will search for the location and populate the base and/or allowable maximum rate for reimbursement.

Travelers should review the rates prior to incurring lodging expenses to ensure the nightly rate is within the reimbursable range (base rate x 2).

- Domestic GSA rates are available at <https://www.gsa.gov/travel/plan-book/per-diem-rates>
- Alaska, Hawaii and U.S. Territories rates are available at <http://www.defensetravel.dod.mil/site/perdiemCalc.cfm>
- International destination rates are available at https://aoprals.state.gov/web920/per_diem.asp

Example: The basic rate per night in Columbia, South Carolina is \$101.00. Any per night hotel cost between \$101.01 and \$202.00 ($\$101 \times 2$) is considered allowable. When traveling to areas where higher than standard rates are applicable, travelers are reminded to carefully check the actual location/address of the selected lodging before confirming the reservation. The Mason Travel Office is authorized to reimburse travelers for lodging costs based on the actual location of the lodging and not a nearby city. For example, travelers to the Boston area will be reimbursed at Boston rates only when the lodging is physically located in Boston, the city

of Cambridge or Suffolk County. Reimbursement for lodging in nearby Brookline, located in Norfolk County, is at the standard lodging rate. In the San Francisco area, the higher lodging rate is in effect for San Francisco and San Francisco County only. Many hotels near the airport, such as the San Francisco Airport Marriott, are actually located in San Mateo County where lodging is reimbursed at a lower rate.

The following link may be useful to travelers to determine if a zip code is located in a county with higher lodging rates: http://explorer.naco.org/index.html?zipSearch_. Travelers should check, request and confirm government rates both at the time reservations are made and during check-in.

Hotel Folio/Lodging Bills

An original itemized hotel bill must support lodging reimbursement requests. For hotel rooms obtained through internet providers, the traveler must attach the entire receipt from the internet site showing total cost and confirmed services. No lodging reimbursement is authorized for informal lodging arrangements such as staying with friends, colleagues or relatives. To email a receipt to your Receipt Gallery, simply attach the images or files to an email message, and send the message to (receipt@ca1.chromeriver.com). If you are sending the message from an account other than your Mason email address (e.g., you are forwarding a receipt that was sent to your personal email), ensure that you have set up the email as an *Alternative Email* in your *Personal Settings*.

Internet Charges

Travelers may be reimbursed for internet charges at hotels when internet access is necessary for business activity. To be reimbursed for internet charges, travelers must provide an explanation of the internet usage, such as checking and responding to email. The explanation may must be added under the “Description” on the Expense report item in order to proceed. Internet charges to sponsored funds are allowable only when directly related to the specific grant or contract. As such, checking email could only be charged to a grant if email activity was limited to, and directly related to, a specific project.

Alternative Lodging

When lodging other than traditional hotels and motels is used, apartments or Airbnb for example, travelers are encouraged to thoroughly review all cancellation and prepayment policies and evaluate any additional fees. The lodging rates detailed above apply to alternative lodging and some fees may be included in the nightly rate calculation. Compared to traditional hotel and motel providers, who typically allow cancellations and refunds within 24 hours of arrival, alternative lodging providers may have stricter rules. In addition, alternative lodging providers typically require the traveler to pay for the entire stay well in advance of the travel date. Travelers are discouraged from agreeing to any cancellation policy that does not provide a full refund if cancelled with one days’ notice.

Reimbursable alternative lodging fees (must be included in the nightly rate calculation)

- Cleaning fees
- Service fees
- Reservation/Booking fees

Travelers assume all risk when placing travel charges on their personal debit/credit card. The university will not reimburse travelers for charges related to cancellations, no shows or travel insurance. Travelers may only seek reimbursement for lodging costs after the trip is completed.

Long-Term Travel - Travel Greater than 30 Days

Because per diem rates are established for short term visits, it is expected that when research or business requires residence in a distant location for longer periods of time, travelers will be able to find less expensive accommodations and meal arrangements. Therefore, reimbursement for actual lodging and meal expenses for trips greater than thirty (30) days will be permitted up to 50% of the current published federal per diem rates for those expenses at that location, available at domestic per diem or foreign per diem. Receipts are required for lodging. The reimbursement limits apply for the entire duration of the trip, not just the portion of the trip greater than thirty (30) days.

Room Sharing

The Travel Pre-Approval and/or Expense Reimbursement must be annotated to explain more than one person in a room. When two or more people are traveling on official state business and staying in the same hotel room, the allowable lodging rate will be the lodging rate allowed in the area they are staying, plus the cost charged by the hotel for any additional persons in the room. Documentation from the hotel listing additional hotel charges for each additional person, per room must be provided. If the additional traveler is not a business traveler, only the single room rate may be claimed.

For non-luxury, conference hotels, the total daily lodging amount for Mason travelers sharing a room cannot exceed the maximum daily lodging rate for a single traveler plus 75% of the basic rate for each additional traveler. . For example, two Mason staff members plan to share a room while attending a conference. The basic lodging rate at the conference location is \$80 per night standard rate/\$160 per night maximum rate. The maximum reimbursable amount is \$160 plus \$60 (75% of the basic rate) = \$220 per night for the room (not per Mason traveler).

Per Diem Rates

As with lodging, the Commonwealth of Virginia utilizes per diem rates for domestic meals and incidental expenses that are governed by the U.S. General Services Administration (GSA). The meals and incidental expenses (IE) breakdown for the 48 contiguous United States is available at www.gsa.gov/mie. **The meals and incidental per diem must correspond to the location specified for the overnight lodging.**

Domestic and International per diem rates are built into the Mason Finance Gateway and include:

- meals, including taxes and tips
- transportation to where meals are taken
- personal telephone calls
- laundry expenses
- tips to baggage handlers

International Per Diem Rates

- Alaska, Hawaii and U.S. Territory rates are available at:
<http://www.defensetravel.dod.mil/site/perdiemCalc.cfm>
- International destination rates are available at:
https://aoprals.state.gov/web920/per_diem.asp

Travel Departure and Return Days

On travel departure and return days, travelers receive 75% of the per diem allowance, regardless of the time of departure or return. The return day allowance is based on the rate at the location where the traveler spent

the night prior to returning. The Per Diem Wizard embedded within the Mason Finance Gateway will automatically calculate the travel day rate for departure and return when added as an expense. Please note that if the first or last day of travel is deleted the additional deduction button will need to be used to reduce the per diem by 25% on the new departure and/or return date.

“No-cost” Meal

The daily per diem rate must be reduced for all "no-cost" meals the traveler receives. “No-cost” meals are those included in event registration fees, provided by the hotel or paid for by someone other than the traveler. For example, a continental breakfast or reception is offered as part of the travel event and the food/timing is sufficient to serve as a meal, the traveler must deduct the per diem by the appropriate allowance amount. If a meal is offered as part of a conference and the traveler has medical restrictions, the traveler should make every effort to have the conference facilitate his/her need by the deadline specified by the conference. If the conference does not honor the request, the traveler is not required to deduct the applicable meal allowance for the per diem. However, the traveler must include a comment in the Mason Finance Gateway to document this information. The Per Diem Wizard embedded in the Mason Finance Gateway allows users to deduct meals and will automatically perform the calculation.

Commercial Air/Rail

Payment of commercial airfare or rail travel for university business should be paid using a department P-Card. This ensures that travelers do not incur unnecessary out-of-pocket expenses and adhere to the air/rail limitations. Airline and rail travel cannot exceed the rates charged for tourist or coach class accommodations. **Acela service (Amtrak) and First-Class air travel is prohibited.**

Exceptions for business class air or rail travel are allowable under the following circumstances

Air	Rail
<ul style="list-style-type: none">• The business class fare does not cost more than the lowest available tourist/coach fare (comparison must be attached to the Travel Reimbursement)• The travel is to western Europe and the business meeting is conducted within three hours of landing• The travel is for transoceanic, intercontinental trips of more than eight hours• The traveler pays the difference if the receipt shows the coach rate before upgrade.	<ul style="list-style-type: none">• The business class fare does not cost more than the lowest available tourist/coach fare (comparison must be attached to Expense report)• Reserved coach seats are not offered on the route• The traveler pays the difference if the receipt shows the coach rate before upgrade.

Travelers should consider the following options when making air travel arrangements. All tickets and/or receipts must indicate coach class fares unless appropriate documentation is obtained. Some airlines have created a higher level of coach class services that charges a premium for preferable seats, priority boarding, advance seat selection and/or other amenities. Examples of non-reimbursable seats are: United Economy Plus, Delta Comfort, Southwest Business Select and American Premium Economy. Such upgrades in the coach seating area are considered enhancements to the coach fare and are not reimbursable including situations when the upgraded seats are the only ones available on a desired flight. Please review the Flight Comparison guide located in the Appendix to determine the most appropriate ticket category.

Airline Fees

Generally, airline travel cannot exceed the lowest rates charged for nonrefundable tourist/coach fare with a reasonable number of stops given the distance traveled. Justification is required for the purchase of refundable tickets. Written approval from OSP must be provided if refundable tickets are required while on travel for a grant. Some airlines have created a higher level of coach class services that charge a premium for preferable seats, priority boarding, advance seat selection and/or other amenities. Such upgrades in the coach seating area are considered enhancements to the coach fare and are not reimbursable.

Some airlines charge additional fees for services, such as checked baggage. When planning a trip, travelers should be aware of these fees and associated limitations, and consider the total cost when selecting the most appropriate carrier. These fees are reimbursable with a receipt when limits must be exceeded for legitimate business purposes. The description on the baggage expense line needs to justify the purchase of two or more checked bags. For example, checked baggage required to carry equipment or presentation/conference materials.

Ground Transportation

Personal Vehicle

Travelers may be reimbursed for use of a personal vehicle while traveling on university business. Planned personal vehicle or rental car costs cannot exceed the total cost of the trip using the most economical public air transportation available. All travel costs (including meal, lodging, parking, ground transportation, etc.) should be considered for each option. Reimbursement shall be limited to the least expensive option (flying vs. driving). Comparative statements must be attached to the Expense report for reimbursement.

Mileage Rates

Travelers may be reimbursed at the personal mileage rate, currently \$0.625 per mile (July 2022), in the following situations:

- The mileage does not exceed 280 miles per day.
- The mileage per day is more than 280 miles, but the cost of a personal vehicle is less than the cost of an Enterprise vehicle. The traveler must attach the Enterprise Trip Calculator Form to the Expense Reimbursement.
- An Enterprise rental vehicle is not available. The traveler must print a copy of the Enterprise page indicating vehicle is sold out for the day(s) requested and attach it to the Expense Reimbursement.
- The proposed driver is younger than 21 years of age.
- An employee will normally be reimbursed at the fleet rate, currently \$0.246 per mile, when he/she drives a personal vehicle more than 280 miles per day for business related travel.

Commuting Mileage

Round-trip mileage traveled routinely and directly by an employee between his residence and work place incurred on a workday is considered commuting mileage. Commuting mileage and other commuting costs incurred on workdays are considered personal expenses and are not reimbursable. When traveling for business, the commuting mileage must be used to reduce the reimbursable mileage expense when a traveler leaves or returns to their home on a week day. The commute can be indicated and automatically deducted by adding commute miles to the commute button on the mileage tile in Mason Finance Gateway.

Parking Fees and Toll Charges

Reimbursement is provided for parking fees and toll charges incurred. Parking at airports is limited to the most economical rate. **Parking at any Mason campus will not be reimbursed to current employees.** Travelers should work with Parking Services to acquire a departmental parking pass when traveling between campuses for university business.

Motor Pool Vehicles

A traveler may also utilize a Facility Services Motor Pool vehicle for approved university activities. A Motor Vehicle Request form and driver awareness training must be completed before an employee can utilize the Motor Pool. Additional information on driver awareness training may be found at <http://risk.gmu.edu/training/driver-training/>. A Motor Pool Vehicle Request form must be submitted at least three days in advance of the proposed travel date and is available at Motor Pool Request Form. These vehicles come with a fuel card. Costs for the vehicle and fuel will be charged directly to the user's fund or organization. Mileage greater than 300 miles round trip, must be approved in advance by the Office of Risk Management. The cost of using a motor pool vehicle and fuel will be charged directly to the department. Additional information may be found online at <https://transportation.gmu.edu/transportation-services/#MotorPool>.

Enterprise Rental Vehicles

The Virginia Office of Fleet Management Services has partnered with Enterprise Rent-a-Car to provide short term rental cars for state agencies. All vehicle reservations must be made at least 24 hours in advance of the anticipated pick-up of the vehicle. Travelers are required to access the Enterprise Trip Calculator at [Trip Calculator](#) when planning a trip that involves traveling more than 280 miles per day. In most cases a traveler will be reimbursed for the cost of an Enterprise rental vehicle and gas OR mileage at the fleet rate. An Enterprise Guide provides details and is available in the Appendix. Mason travelers paying for rental vehicles with a personal credit card will be required to pay all taxes at Enterprise Rent-A-Car. The taxes paid by the renter will be fully reimbursable with appropriate receipt documentation.

*At least 24 hours before a trip, the Enterprise Trip Calculator should be accessed at [Trip Calculator](#). Cost Comparison page must be printed and attached to the Expense Reimbursement.

**Page indicating vehicle not available on specific date(s) must be printed and attached to the Expense Reimbursement.

The number of days to be entered in the calculator will be the number of 24-hour car rental days necessary for the trip. For example, if the Enterprise location is open Monday-Friday from 7:30 a.m. to 6 p.m., it may be necessary to pick up or return a car a day before and/or after the trip.

The Enterprise agreement also offers a 10% discount on airport rentals and a 5% discount on non-airport rentals outside of Virginia when traveling on university business. Reservations should be completed at Enterprise's George Mason link [Enterprise Reservations](#) by selecting "Business Use – All Locations."

Adjustments to Enterprise Calculator

Since the Enterprise calculator is "protected" at the state level, Mason users are not permitted to make electronic changes to rates or calculations. Thus, in some circumstances, it may be necessary to make written changes to the amounts generated by the calculator for purposes of determining the lowest cost transportation. If adjustments are made, the printed page should be scanned, uploaded and attached to the Travel Reimbursement.

In the following situations, the Enterprise calculator should be printed and an adjustment should be written on the Lowest Cost Transportation line of the calculator page. The calculator should then be scanned, uploaded and attached to the Travel Reimbursement.

- A minivan is required. In some situations, the number of travelers or equipment being transported dictates the use of a minivan. In those cases, after printing the Enterprise calculator, the amount displayed in the Enterprise Vehicle box should be doubled and that doubled amount written on the Lowest Cost Transportation line with the notation “minivan required” and the reason for using the minivan.
- The proposed driver is younger than age 21. The Enterprise contract requires that the driver be 21 years of age or older. If the traveler is under 21, write “driver is younger than age 21” on the Lowest Cost Transportation line. Reimbursement will be at the personal mileage rate.
- A trip originates where state contract rates are not available. If a traveler will begin a trip in a location other than Virginia, Maryland or the District of Columbia where state contract rates are available, the amount displayed in the Enterprise Vehicle box should be crossed out and replaced with the Total Estimated Charges for a compact or intermediate car at the rental location. The Enterprise page displaying that rental information (please see example below) should be printed and attached to the calculator.

Reservation Summary

80% Complete

Special Section
GEORGE MASON UNIVERSITY-CC/BUSI

Location Details [change](#)
Pick Up Location
9854 FAIRFAX BLVD (LEE HWY)
FAIRFAX, VA 22030-1737
Tel. (703) 273-3344
[We'll Pick You Up.™](#)

Dates & Times [change](#)
Pick Up
Apr 18, 2017 @ Noon
Return
Apr 19, 2017 @ Noon

Vehicle Class [change](#)
Intermediate

Verify your information and Book your Rental. [Book Now](#)

Total Cost Estimate
For a(n) **Intermediate rental** (Toyota Corolla or similar).
1 Day @ \$ 33.00 USD \$ 33.00 USD
Drop Charge \$ 0.00 USD
VLF DR \$ 0.15 USD
VIRGINIA RENTAL TAX \$ 1.33 USD
VIRGINIA RENTAL FEE \$ 0.66 USD
VIRGINIA ADDTL TAX \$ 1.33 USD
*** Total Charges \$ 36.47 USD**

Additional surcharges, local taxes, etc. may apply.

Your Business Rental Program benefits have been Applied

Important Information About Your Rental
• Rentals originating and remaining in the State of Virginia are given unlimited mileage. Out of State Travel originating in the State of Virginia are allotted 175 miles/day and .20mile for any additional miles.

Intermediate
Toyota Corolla or similar

Explore Protection Products

Damage Waiver	Included in price
Roadside Assistance	See Details
Supplemental Liability Protection	Included in price

Actual prices may vary depending on the vehicle class that is selected.
These optional products may be purchased at the time of rental and are not included in the Total Cost Estimate quoted in this Reservation.

Insurance on rental vehicles

Employees: The Commonwealth provides a statewide self-insured plan for employees. Therefore, employees will not be reimbursed for rental car insurance for locations within the United States, and employees should decline liability damage waiver (LDW) and collision damage waiver (CDW) insurance for travel within the United States. Other forms of insurance such as personal accident insurance (PAI) are also not reimbursable.

Non-employees: A traveler who is not a state employee should determine whether his/her personal automobile insurance provides coverage on rental vehicles. Reimbursement for insurance charges will only be made for those individuals without such coverage.

International Travel: All travelers in international countries must purchase appropriate insurance and will be reimbursed for all reasonable, necessary and actual insurance premiums.

Gasoline charges

Reimbursement for fuel is limited to prices at customary, competitive outlets. In no instance should the traveler enter into a “Fuel Agreement” or pay for fuel in advance when renting a vehicle. No instance includes situations where the fuel agreement per gallon fuel cost is less than prevailing per gallon rates. Receipts are required when the reimbursement claim exceeds \$75 per instance.

Other Rental Vehicles

Reimbursement may be received for rental of a compact, economy, mid-size class or standard cars when circumstances warrant. **Luxury vehicle rentals will not be reimbursed.** No reimbursement is authorized for vehicle rentals from non-traditional sources or for informal vehicle rentals from friends, colleagues or relatives. Peer-to-peer car sharing sites (i.e., Turo, GetAround, HyreCare, etc.) require advance approval from the Travel Department prior to booking.

Taxi and shuttle van fare

Reimbursement is provided for taxi and shuttle van fares between airports or other transportation terminals and hotels or other lodging facilities. Receipts are required when the reimbursement claim exceeds \$75 per instance. A maximum tip of 15% of the taxi cab or shuttle service fare is reimbursable as a transportation cost. The amount of the tip should be separated from the fare on the Expense Reimbursement.

Mason Finance Gateway - Expense Reimbursement

The Mason Finance Gateway is our travel and expense management system used to process all pre-approvals and reimbursements for university business. The Gateway is fully automated, with an electronic workflow and automatic posting to Banner Finance. This means less data entry, fewer account coding errors, easier approvals, and reimbursement occurs quicker.

Mason Finance Gateway offers several methods for assisting the user retrieve and document receipts for expenses.

- There's two Apps! Users can download the *Chrome River App* to have full mobile access to their accounts at any time. In addition to the system app there is a supplemental *Snap app* camera extension that allows users to take photos of their receipts to upload directly to their profile.
- Direct email forward: There is the ability to email receipts from a Mason or personal email, directly to your profile. These advantages mean that users will spend less time creating expense reports and entering data for each presented receipt.
- Lead with the receipt! Optical character recognition, built into the system, will recognize receipts and hotel folios to automatically itemize the expenses. Save time by adding receipts to the Receipt Gallery!
- Traditional document upload is also available.
- Please review the Receipt Guide, in the Appendix, for instructions on how to download the App(s) and other resources.

There are many compliance warnings and violations built into the system to assist users with policy compliance. In addition, there is a full [Help Center](#) available within the application. This means that users can watch a 3-minute video, review a quick guide, or get answers to other system task and navigation questions without having to exit the system and search a separate website.

Individuals are responsible for presenting legitimate and complete expense reports in Mason Finance Gateway. Reimbursement requests and all supporting documentation must be submitted through the Mason Finance Gateway within 60 days of trip or event completion. Reimbursements submitted more than 60 days after trip or event completion may be subject to taxation. Travelers who make multiple local trips (mileage/transportation only) may consolidate them into one monthly Expense report.

In order to access the Gateway, employees must complete the mandatory navigation training. 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. Click on the link to complete this training. Please refer to the [Training Guide](#) for assistance. Once training is completed, users will receive an email confirmation, within 2 days, and be granted access to the Mason Finance Gateway. Expense lines on expense reports created prior to training will need to be deleted and re-created 48 hours after taking training.

Employee Reimbursement

Please refer to the MFG Quick Guides, in the Appendix for specific information on Getting Started with the MFG, processing documents as a Delegate Guide and, how to Approve documents. Information, step-by-step guides, and videos are available on the [Mason Finance Gateway](#) webpage to assist users with processing travel, food and beverage, or other business expense reimbursements. When logged into the Gateway, extensive resources are available within the system under *Help Center*.

Student, Candidate/Non-employee Reimbursement

Active student, student wage, candidate, and other non-employee reimbursements are processed through the Mason Finance Gateway. To check if a vendor already exists in Banner, you may look up the vendor name by using the following application, [Banner Vendor G Number Lookup](#). Please note that GRAs and GTAs are considered employees and will have access to the Mason Finance Gateway once training is completed (See [Training Guide](#) for additional information).

Active students, student wage, 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 Budget Approver, and when applicable to the International Tax Office, Office of Sponsored Programs, and/or the Office of Research Integrity and Assurance. If you cannot locate the individuals G# in the MFG, please contact mfgadmin@gmu.edu. Please review the Student/Non-employee reimbursement guide located in the Appendix.

International Visitors

Departments are encouraged to contact the International Tax Office in Fiscal Services when foreign nationals (non-US citizens) visit the university. The visitor’s nonimmigrant visa type will determine if the traveler is eligible for travel reimbursement. If possible, the visitor should schedule an in-person meeting with the International Tax Office so the Tax Coordinator can analyze the visitor’s tax status and prepare the appropriate tax documents. For more information, see [International Tax Office](#). The Fly America Act applies to federally funded awards which cover visitor and participant airfare. Please see the Sponsored Projects section of this manual for more information.

Contractors

Guest lecturers, consultants, vendors and other contractors are not normally reimbursed for their travel expenses. Instead, their travel costs should be included in their contracts or honoraria. In situations that require separate payment of a contractor’s travel expenses, all requirements and limitations of the travel policy apply. Departments should be aware that direct reimbursement of travel expenses is one of the factors leading to classification of an individual as an employee rather than a contractor. All payments to contractors must be supported by an “Employee/Independent Contractor Evaluation Form” and a substitute W-9 form. Both forms are available from the Accounts Payable Department and from the Fiscal Services web site at <http://fiscal.gmu.edu>.

Sponsored Projects

The dollar limitations described above also apply to travel conducted in support of grants and contracts sponsored by outside agencies unless the underlying grant or contract specifically provides different reimbursement policies or rates. Pre-Approvals and Expense Reimbursements applying this exception must contain a statement to this effect signed by the Principal Investigator and the Associate Vice President of Research Operations. Principal Investigators (PIs) and unit administrators should review award budgets and travel restrictions to ensure travel costs charged to sponsored funding are allowable.

Additionally, when federal funds are used, provisions of the Fly America Act (FAA) are applicable and travelers must use a U.S. flag air carrier unless circumstances meet the qualifications for a waiver. Including instances in which use of a U.S. air carrier 1) increases the number of aircraft changes outside the U.S. by two or more, (2) extends the travel time by six hours or more, or 3) requires a connecting time of four hours or more at an overseas interchange point. Screen shots supporting the exception should be printed/scanned at the time of airfare purchase to serve as backup to the [Certification of Exception to Fly America Act](#) form. Cost is not considered a reason for exception under this federal regulation, and travelers will not be reimbursed for any transportation cost when there is improper use of a foreign air carrier. Travelers are required to indicate the name of the air carrier for international travel when federal funds are charged.

For additional guidance, please review the [FAA Decision Tree](#). Questions regarding travel to be charged to sponsored projects should be directed to the Office of Sponsored Programs at ext. 3-4806.

Resources

Unit	Email	Extension
TRAVEL		
Covington Travel	PH: 804-474-7077 PH: 888-747-7077	
International Tax Office	inttax@gmu.edu	3-2969 3-5223
Office of Sponsored Programs	osp@gmu.edu	3-4806
Travel Office	travel@gmu.edu	3-2580
NON-TRAVEL		
Accounts Payable	acctpay@gmu.edu apforms@gmu.edu	
GENERAL QUESTIONS		
Mason Finance Gateway Tech	mfgadmin@gmu.edu	
Purchasing Charge Card	papadmin@gmu.edu	3-2580
Training Office	fscomm@gmu.edu	3-5966

University Policy 2101 – Travel, Meals, and Entertainment Expenses

<https://universitypolicy.gmu.edu/policies/travel-authorization-and-reimbursement/>

Related Law & Policy:

- [Policy 1134: University-Sponsored or University-Related International Travel](#)
-

I. Scope

This policy applies to all George Mason University employees, students, and all other organizations and individuals that travel at university expense (“Travelers”) or who incur meal or entertainment expenditures in the course of university business. Compliance with this policy and all related procedures is the responsibility of the person incurring expenses on behalf of the university and those who certify compliance with these requirements by verifying funding availability and approving expenditures.

II. Policy Statement

As an Agency of the Commonwealth of Virginia, George Mason University has a public obligation to ensure that all expenditures are reasonable, necessary, and that they support the mission of the university. Expenditures must be reviewed for compliance with this policy and the procedures on the Fiscal Services webpage.

Records of expenditures may be disclosed pursuant to the Virginia Freedom of Information Act, and individuals are expected to exercise prudent judgment when incurring business expenses.

Actual receipts for all expenses, except for meals and incidental expenses (reimbursed on a per diem basis) and transportation costs below \$75 per instance are required to be submitted.

Reimbursement requests and all supporting documentation must be submitted through the Mason Finance Gateway within 60 days of trip or event completion. Reimbursements submitted more than 60 days after trip or event completion are subject to taxation.

The University will not reimburse expenses that have been or will be paid by other payers. The University will not reimburse any expenses that were charged directly to P-Card. The reimbursement received by an individual from all sources must not exceed the total expenses incurred by that individual.

III. Responsibilities

Travelers are responsible for performing their travel duties in conformity with the provisions of this policy and must submit legitimate and complete documentation to support their travel reimbursement claims. Travelers are responsible for reviewing and approving documentation if prepared by a delegate.

Employees, students, and all other organizations and individuals who incur meals and/or entertainment expenses in the course of university business are responsible for performing their official duties in conformity

with the provisions of this policy, and must submit legitimate and complete documentation to support all purchases.

Principal Investigators (PIs) and Unit Administrators are responsible for reviewing award budgets and travel restrictions when sponsored research funds are charged to ensure that travel, meals and entertainment expenses charged to sponsored funding are allowable. *Review the Travel and Fly America Act section under Sponsored Expenditures located on the Office of Sponsored Programs (OSP) website at <https://osp.gmu.edu/sponsored-expenditures/>.*

Supervisors are responsible for reviewing and monitoring all travel, meals and entertainment expenses that they approve. Such approval will ensure compliance with this policy and certify that the expenses were necessary, appropriate, and incurred while on official university business.

Budget Approvers (fiscal officers within a unit) are responsible for reviewing and monitoring all expenses that they approve. Such approval will ensure compliance with this policy and certify that the expenses were necessary, appropriate, and incurred while on official university business.

The Office of Research Integrity and Assurance (ORIA) is responsible for reviewing and approving international travel in advance of traveling to a comprehensively embargoed country (e.g., Cuba, Iran, North Korea, Sudan, Syria, and the Crimea region of Ukraine) OR to a militarily embargoed country for a Traveler who works with data controlled by the International Traffic in Arms Regulations (ITAR). A list of currently embargoed countries is available at https://www.pmddtc.state.gov/embargoed_countries/.

The University Travel Advisory Committee (UTAC) is responsible for reviewing and approving international travel in advance of traveling to countries or areas under U.S. Department of State Travel Advisories Level 3 and 4, Centers for Disease Control and Prevention (CDC) Level 3 warnings, or countries under comprehensive economic sanctions.

The International Tax Office is responsible for reviewing and approving travel in advance when the Traveler is a non-immigrant visa holder.

The Purchasing and Accounts Payable Department is responsible for administering the provisions of this policy and providing guidance on travel, meals and entertainment expenses.

The Controller is responsible for reviewing and providing approval/denial of any exception to the provisions of this policy. Exceptions will only be considered if submitted in advance of the travel.

IV. Travel Transactions

Domestic Travel

A domestic trip where costs are not expected to exceed \$1,000 must be approved verbally in advance by the Traveler's Supervisor.

A domestic trip where costs are expected to exceed \$1,000 must be approved electronically in advance by the Traveler's Supervisor and the associated Budget Approver. A Mason employee Traveler or their delegate must complete a Pre-Approval in the Mason Finance Gateway and receive approval prior to travel.

Local Travel

Non-commuting travel expenses may be reimbursed when a Traveler must travel in the local area on official business. Normal commuting mileage and expenses are not reimbursable; only the net additional mileage or expenses may be claimed.

An employee generally will not be reimbursed for lodging within 25 miles of his/her work place, office, or official station. If extenuating circumstances and budget permit, an employee may request an exception and obtain advance approval for lodging in the local area. A Pre-Approval, approved by the employee's Supervisor and Budget Approver, may be submitted to the Controller for consideration. To request an exception the Travel Office must be contacted at least 14 days prior to reserving local area lodging for an employee.

Local area lodging paid for guests of the university (e.g., employment candidates) are considered travel expenses. Contracts with local area hotels are listed on the Travel Office webpage at the [Fiscal Services website](#) and should be billed directly to Mason. Guests who obtain their own lodging will be reimbursed up to the allowable lodging rate reflect in the Mason Finance Gateway.

International Travel

All international travel must be approved electronically in advance by the Traveler's Supervisor and the associated Budget Approver. The Traveler or delegate must complete a Pre-Approval and receive approval prior to travel.

The Office of Research Integrity and Assurance (ORIA) must approve, in advance, when international travel is:

- To a comprehensively embargoed country (e.g., Cuba, Iran, North Korea, Sudan, the Crimea region of Ukraine and Syria).
- To a militarily embargoed country (list of these countries available at: http://pmddtc.state.gov/embargoed_countries/) for a Traveler who works with data controlled by the International Traffic in Arms Regulations (ITAR).

The University Travel Advisory Committee (UTAC) must approve, in advance, when international travel is:

- To countries or areas under U.S. Department of State Travel Advisories Level 3 and 4, Centers for Disease Control and Prevention (CDC) Level 3 warnings or countries under comprehensive economic sanctions.

Mason provides International Emergency Insurance for employees travelling on university business overseas. To obtain insurance coverage documents please complete the [International Emergency Insurance Registration Form](#) and submit to the Office of Risk Management at least two weeks prior to your trip.

Group Travel

Occasionally, employees may supervise a group of students on a university-sponsored activity that requires travel outside of the local area. In these situations, the employee must contact the Travel Office for guidance. Group travel may qualify for a Travel Advance to reduce out of pocket expenses for students. Travel involving Mason employees only does not qualify as group travel and individual Travelers will be responsible for their own business travel expenses.

Personal Travel with Business Travel

Occasionally a Traveler may take a trip that includes both personal and business travel or the trip may originate/culminate at a location other than the base location, due to personal reasons. When personal and business travel is combined, the Traveler may only be reimbursed for expenses equal to or less than the cost incurred if originating/culminating at the Traveler's base location (excluding personal travel). In addition, when the cost of the additional personal travel exceeds the business travel expense, Travelers may not use any form of Mason payment (Mason P-Card or Travel Agency billing). The Traveler is required to add an annotation in the "comments" section of the Pre-Approval and Expense Report that the trip includes both personal and business travel. Specific dates of personal travel must be noted. Specific instructions are available in the Personal Travel with Business Travel Guide.

Special Accommodations

Mason complies with the Americans with Disabilities Act (ADA). The Office of Compliance, Diversity and Ethics must certify Travelers requiring special accommodations due to physical or other disabilities prior to making trip arrangements.

V. Non-Travel Transactions

Meals and Entertainment Expenditures

The Commonwealth of Virginia prohibits expenditures for employee personal expenses, including meals, snacks, entertainment, and refreshments. There are limited circumstances in which it is considered appropriate to provide food and beverages to personnel who are not in travel status as described in the Food and Beverage Procedures (<https://fiscal.gmu.edu/food-beverage-overview/>). Participant Funded events, where the food/beverage costs are paid solely from participant fees (i.e., registration fee) are not subject to the policy.

Food/Beverage may not be provided at regularly scheduled or routine meetings (i.e., monthly staff meeting, quarterly unit meeting) or as a way to boost morale or promote goodwill among employees. Alcohol and Flowers are prohibited.

For business purposes there are three basic types of food purchases that occur at Mason:

1. Catering is the activity of providing food and drink for a group of people, typically with services such as setup, staffing, and cleanup included. Catering must be billed directly to the university and is not a reimbursable expense.

2. Business meals are defined as a meal involving substantive and bona fide business discussion provided at a commercial dining establishment open to the general public, or at a university location as long as no service other than delivery/pickup is provided. A business meal may occur in travel or non-travel status.
3. Supplies/Food and Drink is the purchase of food, drink and supplies that does not include any vendor-provided services.

Entertainment Expenditures

In very limited circumstances, it may be considered appropriate to incur entertainment expenses during a business meeting that involves substantive and bona fide business discussions with an outside party, or parties, in attendance.

VI. Grants and Contracts

This Policy, and accompanying procedures, applies to travel, meals, and entertainment conducted in support of grants and contracts sponsored by outside agencies unless the underlying grant or contract specifically provides different reimbursement policies or rates. Pre-Approvals and Expense Reports applying this exception must provide a statement to this effect signed by the Principal Investigator and the Associate VP for Research Operations.

VII. Dates

A. Effective Date:

This policy will become effective upon the date of approval by the Senior Vice President for Administration and Finance and the Provost and Executive Vice President.

B. Date of Most Recent Review:

December 15, 2020

VIII. Timetable for Review

This policy shall be reviewed and revised, if necessary, annually to become effective at the beginning of the University's fiscal year, unless otherwise noted.

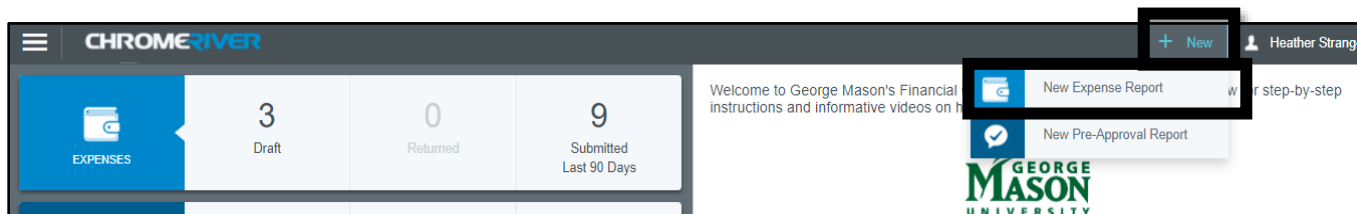
Revision approved: March 10, 2021

Food and Beverage Reimbursement Guide

There are limited circumstances in which it is considered appropriate to provide food and beverages to personnel who are not in travel status. Food/Beverage may not be provided at regularly scheduled or routine meetings (i.e., monthly staff meeting, quarterly unit meeting) or as a way to boost morale or promote goodwill among employees. Alcohol and Flowers are prohibited. Participant Funded events, where the food/beverage costs are paid solely from participant fees (i.e., registration fee) are not subject to the policy. **Every effort should be made to purchase food and beverage using a P-Card and/or eVA purchase order. Catering is not a reimbursable expense. Please review the [Food and Beverage Procedures](#) for further information.**

Step-by-Step

1. Login to the [Mason Finance Gateway](#). *Hint: Click Remember me for quicker future login attempts.* (Single Sign on with 2FA is required, [click here](#) for more info). A Mason employee must submit a reimbursement on behalf of a Student or Non-Employee as these individuals will not have access.
2. Once logged in, you will land on the **Dashboard**. To begin a new document, click on **+ New** and then **New Expense Report**.



3. Complete the report information as follows:

- a. **Report name:** Enter the report name following the suggested format (*If reimbursement is for a Student, include the Students last name in the Report title for easier tracking*)
- b. **Start Date and End Date:** Select Start Date and Enter Date of the event/expense(s)
- c. **Employment Status/Payee:** Select Employee, Student or Non-Employee

- I. For Student an

additional field will appear to enter the Payee G#

- d. **Reason for expense:** Select the appropriate category (Employee or Student Non-Travel)
- e. **Enter Business purpose:** Enter detailed description of the nature of the charges. Name, date, sponsoring club or department, reason for the event and other detailed information.
- f. Click **Save**.

Expenses For Heather Strange

Import from Pre-Approval Optional [IMPORT PRE-APPROVAL](#)

Report Name

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

Start Date

End Date

Employment Status/Payee

Reason for Expense

Business Purpose

For Student Reimbursements –

- Select Student in the Employment Status/Payee field.
- Search for Student G# or Name in the Payee Student field.
- Select Student – Non-Travel Reimbursement in the Reason for Expense field.

Employment Status/Payee

Payee Student

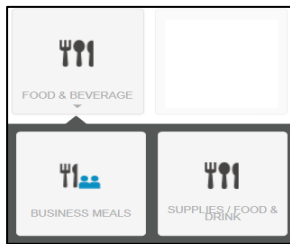
Reason for Expense

4. Select *Create New* or select from *Receipt Gallery* to begin adding expenses to the reimbursement.

Create New to select appropriate expense tile and attach documentation/receipt

5. Select the appropriate expense tile and complete the required information.

If you have already added the receipt to your profile, by using one of the Apps or by forwarding the email receipt you will be able to select it in the *Receipt Gallery*. Once selected the system will automatically



Business meals are defined as a meal provided at a commercial dining establishment open to the general public, or at a university location as long as no service other than delivery/pickup is provided.

Supplies Food/Drink is the purchase of pre-packaged food, drink and meal supplies, such as plates, cups, napkins for an on-campus event. These purchases do not include any vendor-provided services or food delivery. Most supplies food/drink purchases will be made at

6. For Business Meals, click the blue Calculate to enter the location information, calculate the allowable per diem, enter the number of attendees, and enter the amount spent. *Note that the Allowable Food Total is the base rate. The maximum amount is 1.5 x the base rate.*

- Enter the actual amount spent including tip.
- Overages up to 1.5 x the allowable food total are reimbursable.
- Click **Save** to complete the calculation and return to the Expense Report to attach the list of attendees and receipt.

7. The Description field may be used to enter the list of attendees/affiliations if under 6, or to declare a statement of Impracticality. Example: *Attendees list impractical - Student focused event within per diem.*
4. Enter Merchant Name
5. Verify that you have entered or attached the list of attendees.
6. Select the appropriate Allocation.
7. Attach the itemized receipt, and the List of attendees if applicable.
8. Then click **Save**.

This field may be used to enter up to 6 attendees/affiliations. If more than 6 attendees please attach a list of names/affiliations.

Description
Optional

Merchant

I have entered or attached the list of attendees/affiliations ☐

The expense will now be listed on the left side ledger. Ensure that a green checkmark is present. *Note: If the report expense contains a Red or Yellow Triangle you will see an error message noting that a correction is needed. Click on the Transaction to Edit, correct the violation/warning, and then you should see a green check mark and be able to submit.*

Expenses For Heather Strange

MFG Training January 2021

0 Comments 1 Attachments

DATE	EXPENSE	SPENT	PAY ME
Mon 01/04/2021	Business Meals	105.00 USD	105.00 <input checked="" type="checkbox"/>

Add Expenses

Create New

eWallet

All

FOOD & BEVERAGE

NON TRAVEL MISCELLANEOUS OTHER

To add more expenses, continue to *Create New (Step 4)*. When all expenses have been added, click **Submit**, read the Confirmation and then select **Submit** again.

Expense Report 010022163776	Total Pay Me Amount 105.00 USD	Submit
--------------------------------	--	---------------

Once Submitted, you can check the status of documents by clicking on the Submitted section of the Expense ribbon, selecting the Document title and then clicking on the Tracking button to review.

CHROMERIVER

EXPENSES

27 Draft 0 Returned 16 Submitted Last 90 Days

PRE-APPROVAL

Submitted Pre-Approvals

Document Title	Date	Amount	Status	Actions
Test group test Global Ed Nov 11 2020 010000459688	11/11/2020	6,100.00 USD	APPROVED	Open PDF Tracking Expire

Personal Travel Mixed with Business – Guide

Occasionally an employee may take a trip that includes both personal and business travel, or the trip may originate/culminate at a location, other than the base location, due to personal reasons. When personal and business travel is combined, the traveler may only be reimbursed for expenses equal to or less than the cost incurred if originating/culminating at the traveler's base location (excluding personal travel). In addition, when the cost of the additional personal travel exceeds the business travel expense, travelers may not use any form of Mason payment (Mason P-Card or Travel Agency billing). **Cost comparison quotes generated after travel is complete will not be accepted.**

Travel Pre-Approval

The traveler is required to add an annotation in the "comments" section that the trip includes both personal and business travel. Specific dates of personal travel must be noted.

Business Travel Reimbursement

In order to demonstrate that no additional expense was included for air fare for the personal portion of the trip, the traveler must provide a cost comparison, including two set of documents **generated at the time of booking the airfare** (due to daily changing rates). Price comparisons must have the date printed on the face of the document and must match the purchase date of the airfare ticket. **Reimbursement will be for the lower rate.**

The first document must provide that a reasonably priced flight was selected which was relatively consistent with the time necessary for the business travel. An airline website search should be used to track back from the lowest price selecting the appropriate business time constraints following the route from the traveler's base location to and from the business location for the days of business. The second document must denote the fare including the cost of personal travel. For domestic travel, travel days include the day before business begins and day after business ends. For international travel, travel days include two days before business begins and 2 days after. If two one-way flights are used, the documentation must demonstrate this was more cost effective than roundtrip.

Examples of Documentation Comparison:

1. A print out from American Airlines dated 4/1/2017 which shows the cost of the roundtrip flight from the traveler's base location for the business travel dates only. Additional document from American Airlines dated 4/1/2017, which shows the cost of the flight from the traveler's base location inclusive of the business and personal travel dates.
2. A print out from Travelocity dated 4/1/2017 which shows the cost of round trip connecting flights to/from the business destination and travelers base location. Additional document from Travelocity dated 4/1/2017, which shows the cost of a flight to the personal travel destination and a second flight from the personal travel destination to the business location on a different date.

Example of Travel Reimbursement:

A traveler is attending a conference in Chicago, IL and will be on business travel April 1 to April 5 (Saturday to Wednesday). The traveler decides to visit Denver, CO on personal leave after the conference concludes on Wednesday, April 5 and will return to Washington, D.C., the base location, on Sunday, April 9. The traveler departs from Washington D.C. on Saturday at 9:00 a.m. and returns a week later on Sunday at 9:00 p.m.

To determine the portion of airfare that is personal, the traveler must document the cost of roundtrip airfare for the business portion of the trip between Washington and Chicago. The roundtrip airfare between Washington and Chicago, April 1 – 5 is \$350. (The traveler would return Wednesday at 9:00 p.m. for business travel.)

The total airfare to travel from Washington to Chicago, Chicago to Denver and Denver to Washington is \$750 (April 1 – 9).

Total Expenses incurred by traveler

\$750	Airfare for flight to Chicago, flight from Chicago to Denver and flight from Denver to Washington (business and personal combined)
\$400	Lodging – four nights in Chicago (assume \$100 per night)
\$600	Lodging – four nights in Denver (assume \$150 per night)
\$50	Ground transportation in Chicago to/from hotel/airport
\$60	Ground transportation in Denver to/from hotel/airport
\$180	Airport parking at Washington Reagan (assume \$20 per day for 9 days)
\$220	Meals – five days per diem (Sat – Wed), assume \$50 daily per diem and 75% on travel days
\$350	Meals - four days in Denver (no per diem)
\$2610	TOTAL (business and personal travel combined)

Business Expenses eligible for reimbursement

\$350	Airfare for roundtrip flight to Chicago departing on Saturday and returning on Wednesday (the business portion)
\$400	Lodging - four nights (Saturday, Sunday, Monday, Tuesday) (assume \$100 per night)
\$220	Meals - five days per diem (Saturday, Sunday, Monday, Tuesday, Wednesday) (assume \$50 is the daily per diem. 75% on the first and last day of travel)
\$50	Ground transport in Chicago to/from hotel/airport
\$100	Airport parking at Washington Reagan (assume \$20 per day for five days (Sat - Wed)
\$1,120	TOTAL

Personal expenses not eligible for reimbursement in Example:

- Additional \$400 for airfare from Chicago to Denver and return to Washington, D.C. is a personal expense. Further, the cost of the flight may not be purchased with a Mason P-Card because the total cost exceeds the business travel airfare expense. The traveler will be reimbursed \$350 (business portion) upon completion of the trip.
- No lodging for Wednesday, Thursday, Friday or Saturday nights
- No meals for Thursday, Friday, Saturday or Sunday
- Ground transportation (car rental, shuttle, taxi and/or parking) in Denver - entirely personal
- No parking at Washington Reagan airport for Thursday, Friday, Saturday or Sunday
- No miscellaneous expenses (business calls, internet charges) for Thursday, Friday, Saturday or Sunday

Flight Comparison Guide (allowable vs. unallowable)

Always review the “Rules & Restrictions” for comparable tickets to avoid incurring additional fees that may not be reimbursable. Non-refundable economy class must always be selected. Travelers should review the most advantageous fare total, after factoring in allowable charges, and then select either basic economy or main cabin (no premium options selected). Baggage fees are reimbursable to the traveler. Travel protection or insurance is NOT reimbursable. Mason will not reimburse travelers for the upgraded “economy plus, comfort, select” or any additional services that are purchased to supplement a ‘basic economy’ ticket, such as advanced seat assignments unless the seat assignment is included in the ticket purchase and less expensive than purchasing airfare and bags separately. Avoid ticket descriptions or add-ons that mention: early bird, priority, premium, preferred, seat selection fee, early boarding, comfort plus, business class and/or travel protection.

5:52pm - 7:35pm 2h 43m (Nonstop) IAD - MCI \$257 Select
United roundtrip
Very Good Flight (7.8/10)
Details & baggage fees

Rules and restrictions apply

Seat choice	Fee applies
Carry-on bag	Not allowed
Checked bag	Fee applies
Cancellations	Not allowed
Changes	Not allowed
Personal item	Included

You may be able to upgrade your fare before checkout

United Airlines

*No carry-on bag allowed (this means the traveler may have to ‘check’ one or more bags, which would increase the overall cost of the trip)

*Seat Choice Fee – NOT Allowable/Reimbursable

Total Cost \$257 + \$70 (2 bag fee) = \$357



Delta Airlines

*Carry-on bag included

*Seat Choice Fee – NOT Allowable/Reimbursable

Total Cost \$266 + \$30 (1 bag fee) = \$296

6:00am - 9:32am 4h 32m (1 stop) DCA - 55m in DTW - MCI \$266 Select
Delta roundtrip
Satisfactory Flight (6.6/10)
Details & baggage fees

Rules and restrictions apply

Seat choice	Not allowed
Carry-on bag	Included
Checked bag	Fee applies
Cancellations	Not allowed
Changes	Not allowed
Personal item	Included

You may be able to upgrade your fare before checkout

Select this fare

8:30am - 10:13am 2h 43m (Nonstop) DCA - MCI \$252 Select
American Airlines roundtrip
Very Good Flight (7.8/10)
American Airlines 4556 operated by Republic ...
Details & baggage fees

Rules and restrictions apply

Seat choice	Not allowed
Carry-on bag	Included
Checked bag	Fee applies
Cancellations	Not allowed
Changes	Not allowed
Personal item	Included

You may be able to upgrade your fare before checkout

American Airlines

*Carry-on bag included

*Seat Choice Fee – NOT Allowable/Reimbursable

Total Cost \$252 + \$30 (1 bag fee) = \$282



Southwest

Total Cost = \$319.96

*Carry-on bag included

*2 free checked bags

*Early-Bird Fee – NOT Allowable/Reimbursable

Southwest

JUN 7 - 10 DCA → MCI \$316.96 TOTAL

Wanna Get Away

Earn 763 Rapid Rewards® points per Passenger, per one-way.

2 free checked bags (1st and 2nd checked bags fly free. Weight and size limits apply.)	No change fee (Fare difference may apply.)	\$0.00
Reusable funds		\$268.24
		\$48.72
		\$316.96

Show price breakdown

TOTAL DUE NOW \$316.96

Enterprise Reservation Guide

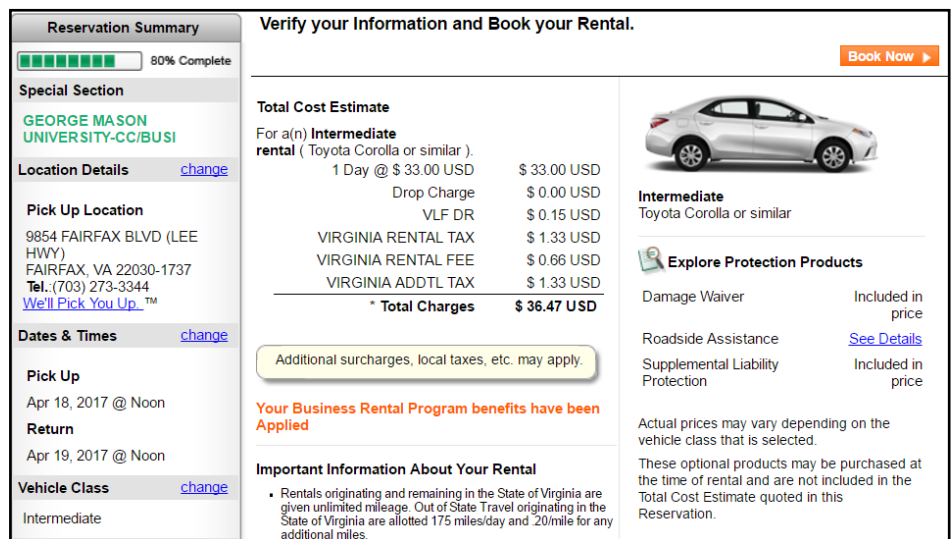
The Enterprise Trip Calculator must be uploaded and attached to the Travel Reimbursement when the per day mileage is expected to exceed 280 miles per day. If Personal Vehicle is the lowest cost, attach a copy of the Trip Calculator to the Travel Reimbursement in order to receive the higher personal rate mileage reimbursement. If a Trip Calculator is not attached and mileage exceeds 280, then reimbursement will be made at the lower fleet rate.

Enterprise Trip Calculator instructions:

- ✓ At least one day before the trip, open the Enterprise Trip Calculator at <https://dgs.virginia.gov/fleet/travel-planning/trip-calculator/>.
- ✓ Enter the five items of information requested for the trip
 - Traveler's name
 - Mason _____ (department)
 - Destination
 - Number of miles for the trip
 - Number of days for the trip*
 - *days are 24 hour days, for example 10 a.m. Monday-10 a.m. Tuesday is 1 day.

If the cost of an Enterprise vehicle displayed is less than the cost of a personal vehicle

1. Select "Go to Enterprise Reservation Site"
2. Select George Mason University (NOT George Mason University-Motorpool)
3. Select campus location to reserve at that location; OR Select Business Use –All Locations to reserve at another location, perhaps a location near the traveler's home
4. Enter trip dates and times
5. Select a vehicle included in the agreement at the state contract rate (compact/Intermediate)



The screenshot shows the 'Reservation Summary' and 'Verify your Information and Book your Rental' sections. The reservation is for George Mason University (CC/BUSI) at the Fairfax location. The trip is for 1 day on April 18, 2017, from noon to noon. The vehicle is an Intermediate Toyota Corolla. The total cost estimate is \$36.47 USD, including rental, taxes, and fees. A 'Book Now' button is visible in the top right corner.

Reservation Summary		Verify your Information and Book your Rental.															
<p>Special Section</p> <p>GEORGE MASON UNIVERSITY-CC/BUSI</p> <p>Location Details change</p> <p>Pick Up Location</p> <p>9854 FAIRFAX BLVD (LEE HWY) FAIRFAX, VA 22030-1737 Tel.: (703) 273-3344 We'll Pick You Up.</p> <p>Dates & Times change</p> <p>Pick Up</p> <p>Apr 18, 2017 @ Noon</p> <p>Return</p> <p>Apr 19, 2017 @ Noon</p> <p>Vehicle Class change</p> <p>Intermediate</p>		<p>Total Cost Estimate</p> <p>For a(n) Intermediate rental (Toyota Corolla or similar).</p> <table border="1"> <tr> <td>1 Day @ \$ 33.00 USD</td> <td>\$ 33.00 USD</td> </tr> <tr> <td>Drop Charge</td> <td>\$ 0.00 USD</td> </tr> <tr> <td>VLF DR</td> <td>\$ 0.15 USD</td> </tr> <tr> <td>VIRGINIA RENTAL TAX</td> <td>\$ 1.33 USD</td> </tr> <tr> <td>VIRGINIA RENTAL FEE</td> <td>\$ 0.66 USD</td> </tr> <tr> <td>VIRGINIA ADDTL TAX</td> <td>\$ 1.33 USD</td> </tr> <tr> <td>* Total Charges</td> <td>\$ 36.47 USD</td> </tr> </table> <p>Additional surcharges, local taxes, etc. may apply.</p> <p>Your Business Rental Program benefits have been Applied</p> <p>Important Information About Your Rental</p> <ul style="list-style-type: none"> Rentals originating and remaining in the State of Virginia are given unlimited mileage. Out of State Travel originating in the State of Virginia are allotted 175 miles/day and 20/mile for any additional miles. 		1 Day @ \$ 33.00 USD	\$ 33.00 USD	Drop Charge	\$ 0.00 USD	VLF DR	\$ 0.15 USD	VIRGINIA RENTAL TAX	\$ 1.33 USD	VIRGINIA RENTAL FEE	\$ 0.66 USD	VIRGINIA ADDTL TAX	\$ 1.33 USD	* Total Charges	\$ 36.47 USD
1 Day @ \$ 33.00 USD	\$ 33.00 USD																
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VIRGINIA RENTAL TAX	\$ 1.33 USD																
VIRGINIA RENTAL FEE	\$ 0.66 USD																
VIRGINIA ADDTL TAX	\$ 1.33 USD																
* Total Charges	\$ 36.47 USD																

- a. Provide the requested information: renter's name, phone number, email, Department name

6. select continue then select Book Now to complete the reservation

*Note: The cost of an Enterprise vehicle at the contract rate as well as gas expense related to the trip is fully reimbursable. Sales tax will display during the reservation process and is reimbursable when paid with a personal credit/debit card. Travelers may call the telephone number above "we'll pick you up" to arrange for a pick up. Cars are provided with partial or full tanks of gas and must be returned with at least the same amount. **Do not enter into a "Fuel Agreement" with any car rental company.** If charges for refueling are assessed by Enterprise, these will not be reimbursed to the traveler. **The traveler must refuel the vehicle before returning to Enterprise.***

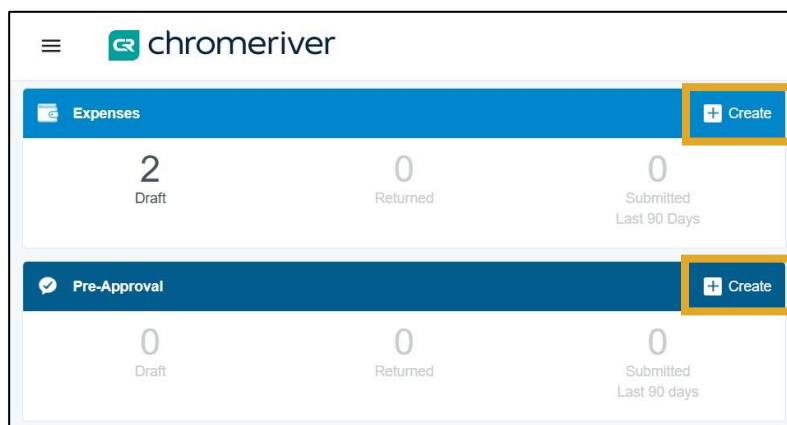
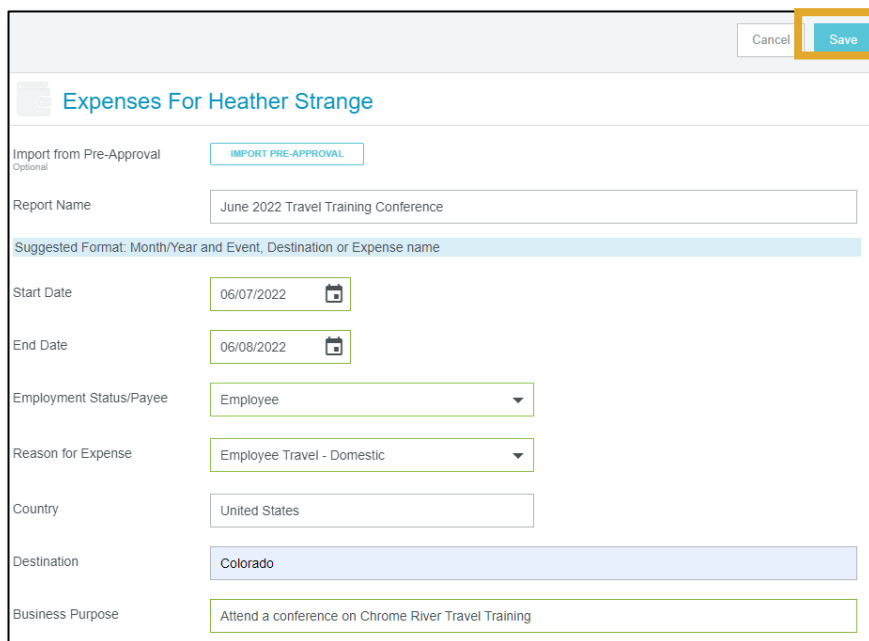
MFG – Getting Started Guide

The Mason Finance Gateway (MFG), powered by Chrome River, is our travel and business expense reimbursement system. All business travel and expense reimbursements must be submitted through the MFG. All employees are required to complete the Mason Finance Gateway Navigation training prior to receiving access. 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.** Within 2 days of training completion you may login and access the system.

GRA/GTAs and non-student wage are classified as employees and should complete the training if they will be submitting, approving, or receiving a business expense reimbursement. Students and Non-Mason travelers will not have access to the system.

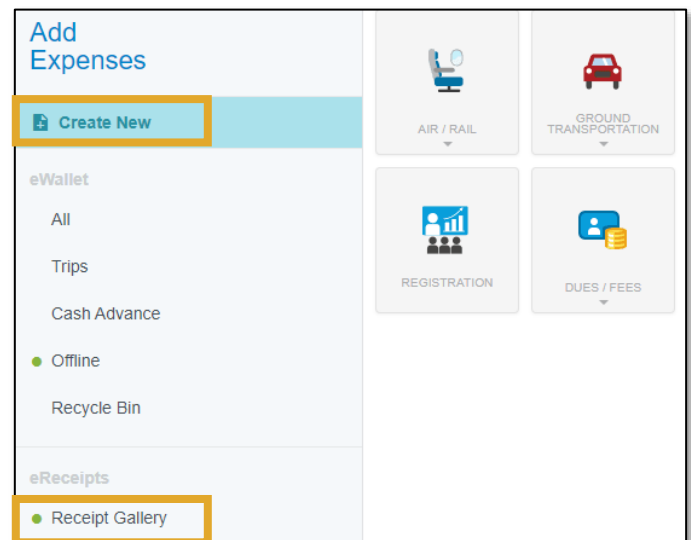
Getting Started

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 **+ Create** under the **Expenses** or **Pre-Approval** ribbon.
3. Complete the report information as follows:
 - a. *Import Pre-Approval:* Only select this option is a Pre-Approval was previously submitted for the trip.
 - b. *Report name:* Enter the report name following the suggested format
 - c. *Start Date and End Date:* Select Start Date and Enter Date of the travel/event for expense(s)
 - d. *Employment Status/Payee:* Select Employee, Student or Non-Employee
 - e. *Reason for expense:* Select the appropriate category (Travel or Non-Travel by employment status)
 - f. *Enter Country* (if applicable)
 - g. *Enter Destination* (if applicable)
 - h. *Enter Business purpose-* Enter detailed description of the nature of the charges.
 - i. Click **Save**

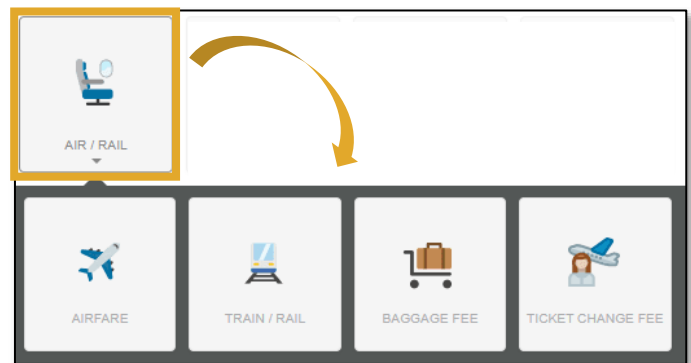
4. Under **Add Expenses**, select *Create New* to view the Expense tiles. The tiles will display based on the selected *Reason for Expense*. For example, when Employee Travel – Domestic is selected, you will see all Travel Expense tiles.

- a. Alternatively, if the traveler has already uploaded a receipt to their MFG profile through email forward or by using the APP to take a picture of the receipt – select *Receipt Gallery* and then choose the appropriate receipt to add to the Expense report directly.



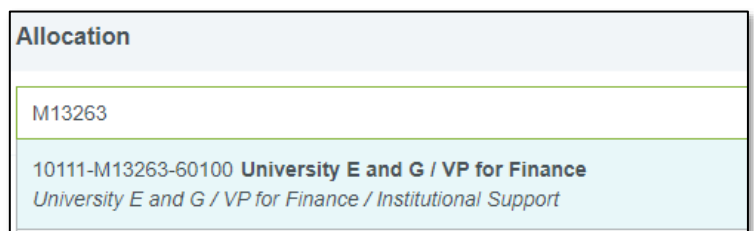
4. Specific expense types are grouped together under a main tile. Clicking on a tile, will show more specific expense types if applicable.

- a. 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.



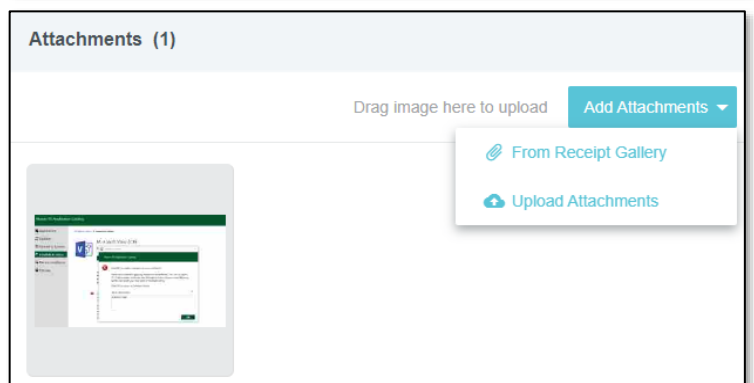
5. Select one or more Expense(s) to add to the reimbursement document. Each tile may require different information from the user. Additional compliance warnings and violation are also built into the system.
 - **Warning** – lets the user know they not following an established rule, but does not prevent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


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

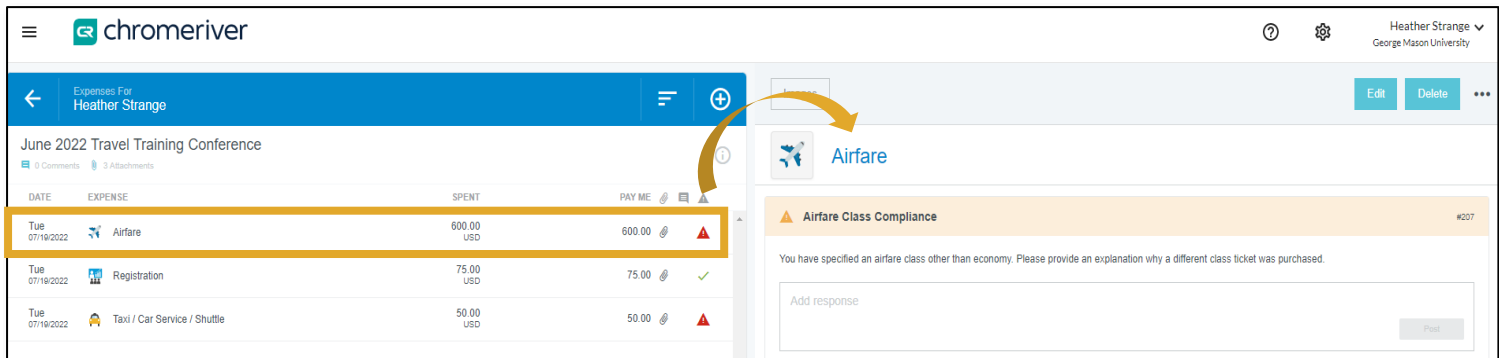


7. Add an **Attachment** (as required by the expense type and any additional documentation). Hint: Review the [Submitting Receipt Guide](#) for tips on emailing receipts and using the Snap App to add receipts directly to your *eWallet* in the Mason Finance Gateway.

- a. Attachments are visible by clicking on the displayed image.



8. Continue adding expenses by clicking on the  from the top ledger and selecting *Create New* or adding items from *Receipt Gallery*.
9. 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.** Click on the line item from the ledger to view the warning and/or violation and make the correction or add the required comment in order to submit the document.



The screenshot shows the Chromeriver interface. On the left, a table lists expenses for "June 2022 Travel Training Conference". The first row, "Airfare", is highlighted with a yellow border and has a red triangle icon in the "PAY ME" column. On the right, a panel titled "Airfare" shows a compliance warning: "Airfare Class Compliance" with the message "You have specified an airfare class other than economy. Please provide an explanation why a different class ticket was purchased." Below the message is a text input field labeled "Add response" and a "Post" button.

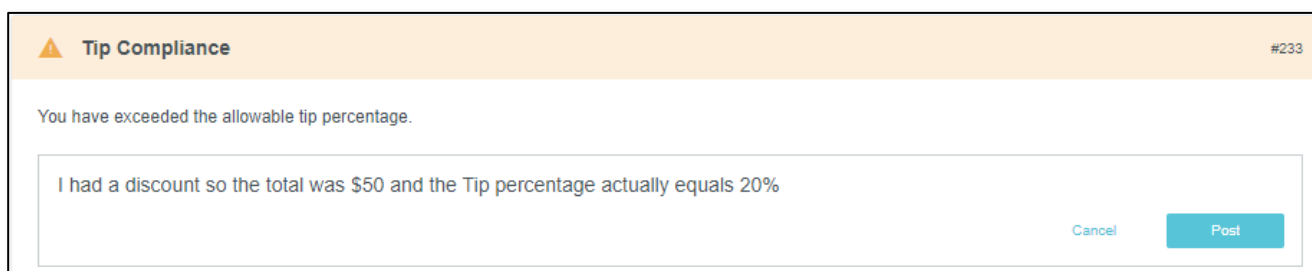
DATE	EXPENSE	SPENT	PAY ME
Tue 07/19/2022	Airfare	600.00 USD	600.00
Tue 07/19/2022	Registration	75.00 USD	75.00
Tue 07/19/2022	Taxi / Car Service / Shuttle	50.00 USD	50.00

- For example, this report shows a red triangle on two expense lines. Click on each line item to review the compliance warning, enter a comment and/or update the expense as instructed to be in compliance with the policy.
- You cannot submit an Expense report that contains a red triangle – this is a violation.



The screenshot shows a red warning box titled "Airfare Compliance - First Class Not Allowed" with the ID "#207a". The message reads: "Per Policy, First Class airfare is not allowed, please correct."

- You can submit an Expense report that contains a yellow triangle – this is just a warning and usually requires explanation to be provided. Once the explanation is complete click on Post to add the comment. That should clear the red triangle and be noted as a warning.



The screenshot shows a yellow warning box titled "Tip Compliance" with the ID "#233". The message reads: "You have exceeded the allowable tip percentage." Below the message is a text input field containing the response: "I had a discount so the total was \$50 and the Tip percentage actually equals 20%". There are "Cancel" and "Post" buttons at the bottom right.

10. Once all line items are listed with green check marks – click on **Submit**, review the agreement and then **Submit** again. 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.*
11. The view where the document is in the approval process. Click on the "Submitted Last 90 Days" under the Expense ribbon, select the appropriate document and then click on *Tracking*.



The screenshot shows the "Expenses" ribbon with three tabs: "Draft" (2), "Returned" (0), and "Submitted Last 90 Days" (1). The "Submitted Last 90 Days" tab is highlighted with a yellow border. To the right of the ribbon is a "Create" button. Further right is a "Tracking" button.

MFG – Submitting Receipts Guide

One of the best features of the Mason Finance Gateway is the image processing, OCR (optical character recognition) and email handling technology which allows users to add a transaction's data into an expense report with little manual entry. There are several ways to submit receipts electronically directly to the Mason Finance Gateway which are explained below. In order to use these features, you must have taken the required training and received access to the Mason Finance Gateway. Additional information is available here: <https://fiscal.gmu.edu/mason-finance-gateway/>.

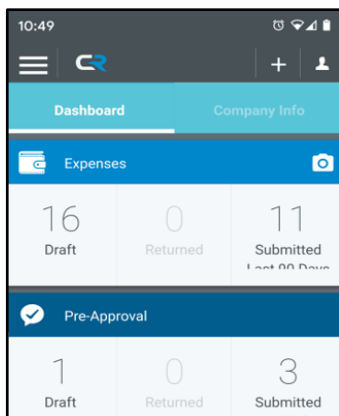
Download the App(s)



Chrome River

Chrome River Technologies, Inc.

✓ Installed



The **Chrome River** app offers the same experience as the desktop site, allowing users to create, submit, and approve expense reports in addition to capturing and uploading receipts.

When adding an Attachment in the **Chrome River** App, select *Upload Attachment*, then *Camera*.



Chrome River SNAP

Chrome River Technologies, Inc.

3.9 ★ 10K+

Chrome River SNAP

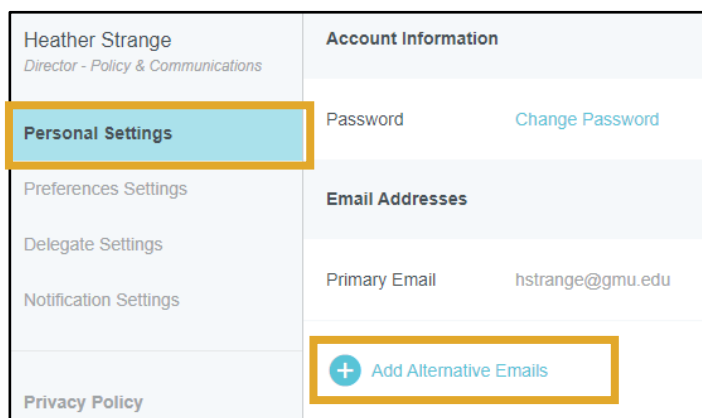
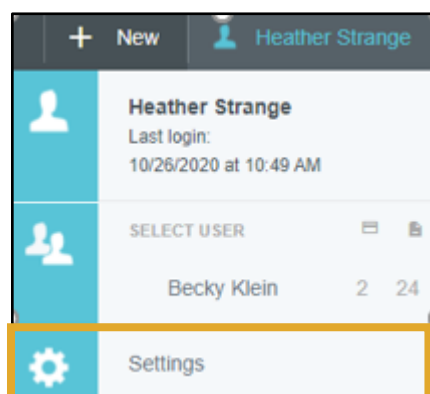
is a supplemental photo app that allows users to take a photo of receipts and add details (optional).

When Uploading a receipt in **SNAP**, the image is available in the users Receipt Gallery.



Email to Receipt Gallery

To email a receipt to your Receipt Gallery, simply attach the images or files to an email message, and send the message to (receipt@ca1.chromeriver.com). If you are sending the message from an account other than your Mason email address (e.g., you are forwarding a receipt that was sent to your personal email), ensure that you have set up the email as an *Alternative Email* in your *Personal Settings* (shown below).



Note: If you are serving as a delegate for another user and need to submit a receipt for that user, you will need to enter the expense owner's Mason email address in the subject line of the email in order to have it show up in their Receipt Gallery and eWallet.

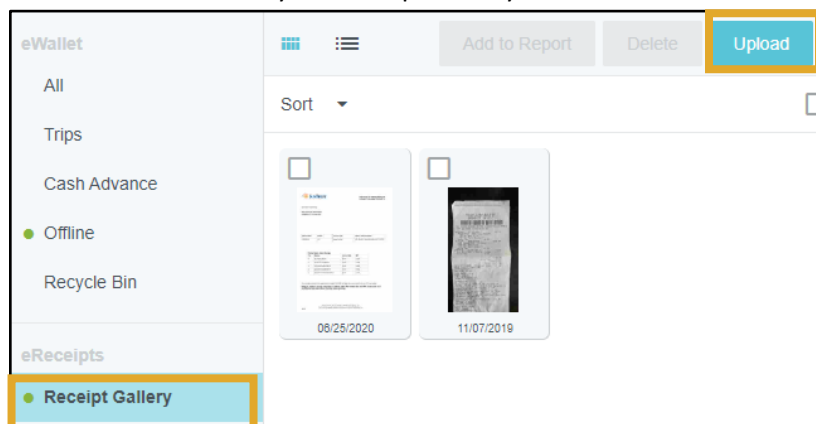
Direct Uber and Lyft Integration

Users may have ride information automatically sent from their [Uber](#) and [Lyft](#) accounts direct to their expense reports when they ride on their Uber and Lyft Business Profiles. After selecting Chrome River as their expense management provider on their Business Profile, Uber and Lyft will automatically send details of all rides taken on their Business Profile, complete with the receipt image and map, to Chrome River, at the same time users receive a copy of their receipt by email.

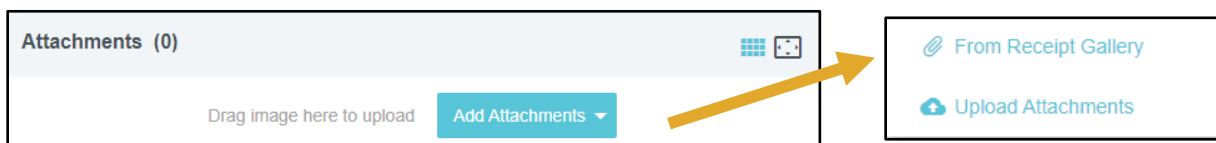
Traditional Upload

If you prefer not to use the App(s) or email options you may upload receipts and documentation directly to your Receipt Gallery or directly to an expense line item. You must have the file saved on your computer in order to upload.

1. Go to your **eWallet** and then select *Receipt Gallery*. Click on *Upload* and then choose the File(s) from your computer. This will add the items to your Receipt Gallery.



2. Upload an attachment directly to the expense by selecting *Add Attachment* at the bottom of the transaction. From here you can attach an item from your *Receipt Gallery* or *Upload Attachments* by opening a file saved on your computer and then uploading it.

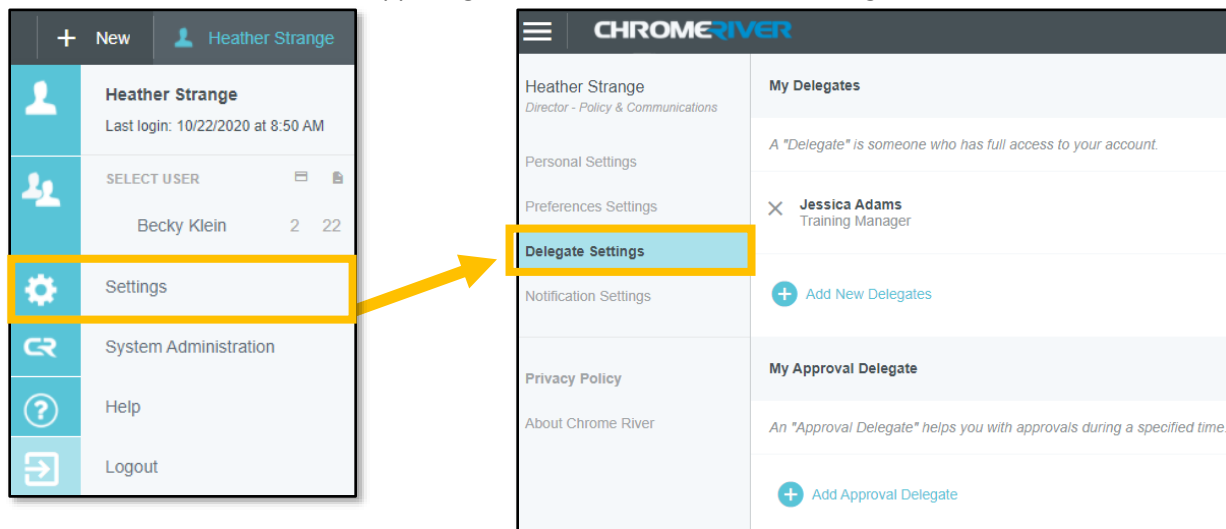


MFG – Delegate Guide

Use this guide to add or edit a **User Delegate** who will have full access to your profile and any submit reimbursable expenses on your behalf, or an **Approval Delegate** who may approve documents, as a Supervisor or Org Approver on your behalf. Instructions are also provided to **submit a reimbursement as a Delegate**, on behalf of someone else, within the unit. Students and Non-employees do not have a Profile in the Mason Finance Gateway, please refer to the guide for Student or Non-employee Reimbursements, in the Appendix of this manual.

Add or Edit a Delegate

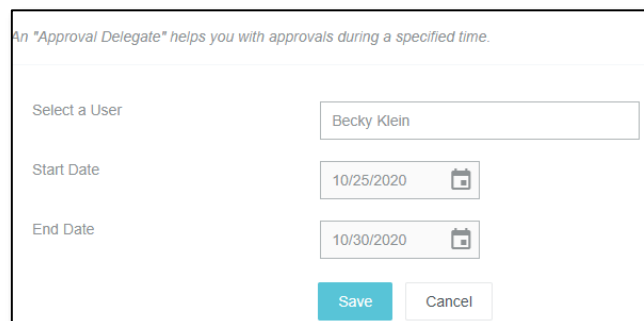
1. Login to the [Mason Finance Gateway](#).
(Single Sign on with 2FA is required, [click here](#) for more info)
2. Click on the user name, in the upper right-hand corner, and select *Settings*.



3. Then select *Delegate Settings*.
 - a. To add a **User Delegate**, who may submit reimbursable expenses on your behalf, click on *Add New Delegates*. Begin to type the person's name to search and then select. *Note: More than one delegate may be added.*



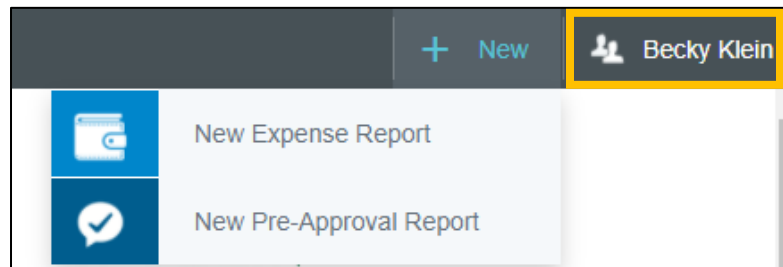
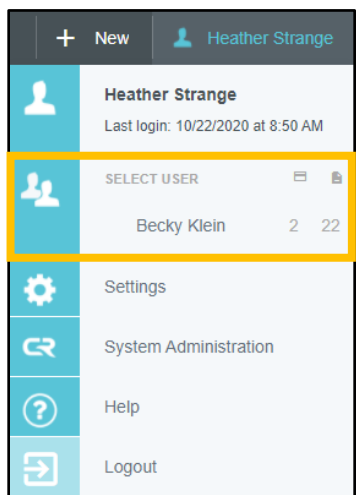
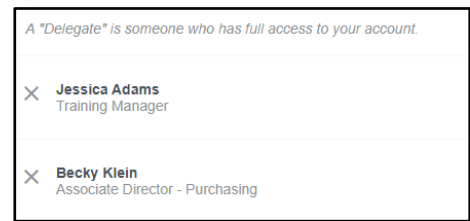
- b. To add an **Approval Delegate**, who may approve documents on your behalf, click on *Add Approval Delegate*. Begin to type the person's name to search and select. Enter a timeframe, then click Save. Do not enter a timeframe that exceeds 12 consecutive months. *Note: Only one approval delegate may be added at one time.*



4. To delete a previously added Delegate, click on the **X** next to their name. This will revoke their access.

Submit as a Delegate

1. To submit a reimbursement on behalf of someone else, the user must already have added you as a **Delegate**.
2. Login to the [Mason Finance Gateway](#).
(Single Sign on with 2FA is required, [click here](#) for more info)
3. Click on the user name, in the upper right-hand corner, and select the *User*. Once selected, the name in the upper right-hand corner should show the selected *User*. Proceed to submit a Pre-Approval or Expense Reimbursement as the Delegate, check status, or view reports. The User will receive an email to approve a submitted Pre-Approval or Reimbursement. The User must approve before the document will continue through the Workflow.

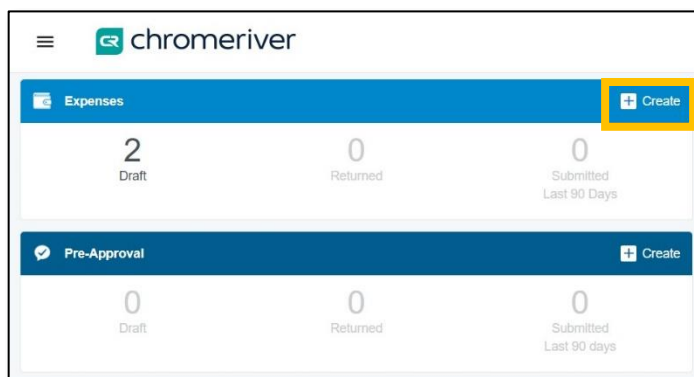


MFG – Student and Non-Employee Reimbursements

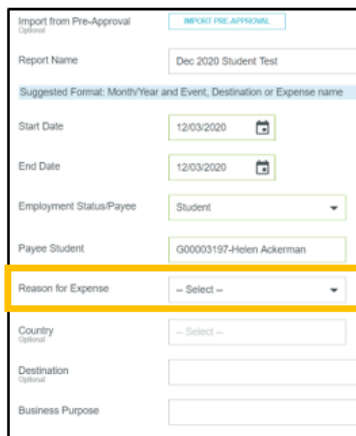
Student, candidate, guest and other non-employee reimbursements are processed through the Mason Finance Gateway (MFG). All payees must have a G number in order to receive reimbursement. Students, candidates and other non-employees do not have access to the system. A Mason user will complete a reimbursement 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 of Research Integrity and Assurance.

Getting Started

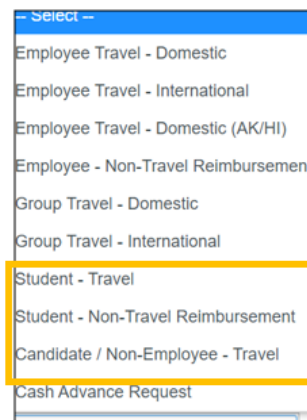
1. Login to the [Mason Finance Gateway](#). Click *Remember me* for quicker future login attempts. (Single Sign on with 2FA is required, [click here](#) for more info)
2. Once logged in, you will land on the **Dashboard**. To begin a new document, click on **+ New** and then **New Expense Report**. Pre-Approval is not required for students, candidates or non-employees.
3. Complete the report information as follows:
 - a. *Import Pre-Approval*: Only select this option if a Pre-Approval was previously submitted for the trip.
 - b. *Report name*: Enter the report name following the suggested format
 - c. *Start Date and End Date*: Select Start Date and Enter Date of the travel/event for expense(s)
 - d. *Employment Status/Payee*: Select Student or Non-Employee (*Answer additional questions for Non-Employee Reimbursements*)
 - e. *Payee Student/Non-employee*: Search for G# or name
 - f. *Reason for expense*: Select the appropriate category (Travel or Non-Travel)
 - g. *Enter Country* (if applicable)
 - h. *Enter Destination* (if applicable)
 - i. *Enter Business purpose*- Enter detailed description of the nature of the charges.
 - j. Click **Save**
4. Under **Add Expenses**, select *Create New* to view the Expense tiles. The tiles will display based on the selected *Reason for Expense*.



The screenshot shows the Chromeriver dashboard. The top section is 'Expenses' with a '+ Create' button. It displays 2 Draft, 0 Returned, and 0 Submitted (Last 90 Days) items. The bottom section is 'Pre-Approval' with a '+ Create' button. It displays 0 Draft, 0 Returned, and 0 Submitted (Last 90 Days) items.



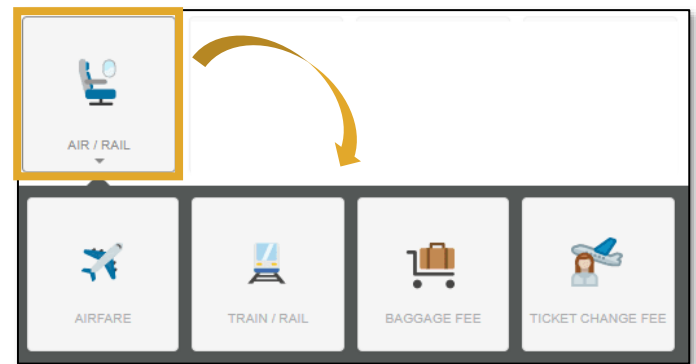
The screenshot shows the 'Import from Pre-Approval' form. Fields include: Report Name (Dec 2020 Student Test), Suggested Format: Month/Year and Event, Destination or Expense name, Start Date (12/03/2020), End Date (12/03/2020), Employment Status/Payee (Student), Payee Student (G00003197-Helen Ackerman), Reason for Expense (dropdown menu), Country (optional), Destination (optional), and Business Purpose.



The screenshot shows the 'Reason for Expense' dropdown menu. Options include: Employee Travel - Domestic, Employee Travel - International, Employee Travel - Domestic (AK/HI), Employee - Non-Travel Reimbursement, Group Travel - Domestic, Group Travel - International, Student - Travel, Student - Non-Travel Reimbursement, Candidate / Non-Employee - Travel, and Cash Advance Request.

5. Specific expense types are grouped together under a main tile. Clicking on a tile, will show more specific expense types if applicable.

- a. 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 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 and will show the full FOAPL information from Banner (line item accounting).

Allocation

M13263

10111-M13263-60100 **University E and G / VP for Finance**
 University E and G / VP for Finance / Institutional Support

8. Add an **Attachment** (as required by the expense type and any additional documentation). Hint: Review the [Submitting Receipt Guide](#) for tips on emailing receipts and using the Snap App to add receipts directly to your *eWallet* in the Mason Finance Gateway.

Attachments (1)

Drag image here to upload
Add Attachments ▾

From Receipt Gallery
Upload Attachments

Attachments are visible by clicking on the displayed image.

9. Continue adding expenses by clicking on the + from the top ledger and selecting *Create New* or adding items from *Receipt Gallery*.
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.** Click on the line item from the ledger to view the warning and/or violation and make the correction or add the required comment in order to submit the document.

chromeriver

Heather Strange ▾
George Mason University

← Expenses For Heather Strange ☰ +

June 2022 Travel Training Conference

0 Comments 3 Attachments

DATE	EXPENSE	SPENT	PAY ME
Tue 07/19/2022	Airfare	600.00 USD	600.00
Tue 07/19/2022	Registration	75.00 USD	75.00
Tue 07/19/2022	Taxi / Car Service / Shuttle	50.00 USD	50.00

✈️ Airfare

Airfare Class Compliance #207

You have specified an airfare class other than economy. Please provide an explanation why a different class ticket was purchased.

Add response


Post

- For example, this report shows a red triangle on two expense lines. Click on each line item to review the compliance warning, enter a comment and/or update the expense as instructed to be in compliance with the policy.
- You cannot submit an Expense report that contains a red triangle – this is a violation.

 **Airfare Compliance - First Class Not Allowed**
#207a

Per Policy, First Class airfare is not allowed, please correct.

- You can submit an Expense report that contains a yellow triangle – this is just a warning and usually requires explanation to be provided. Once the explanation is complete click on Post to add the comment. That should clear the red triangle and be noted as a warning.

 **Tip Compliance**
#233

You have exceeded the allowable tip percentage.

I had a discount so the total was \$50 and the Tip percentage actually equals 20%

Cancel
Post

Once all line items are listed with green check marks – click on **Submit**, review the agreement and then **Submit** again. 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.*

Expenses

2
Draft

0
Returned

1
Submitted
Last 90 Days

Create

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 appropriate reimbursement. You may save the report to your computer and email to the recipient.

Open
PDF
Tracking

Event su

Report Own

Submit Date

Cover Page

Full Report

Full Report with Notes & Receipts

Full Report with Receipts

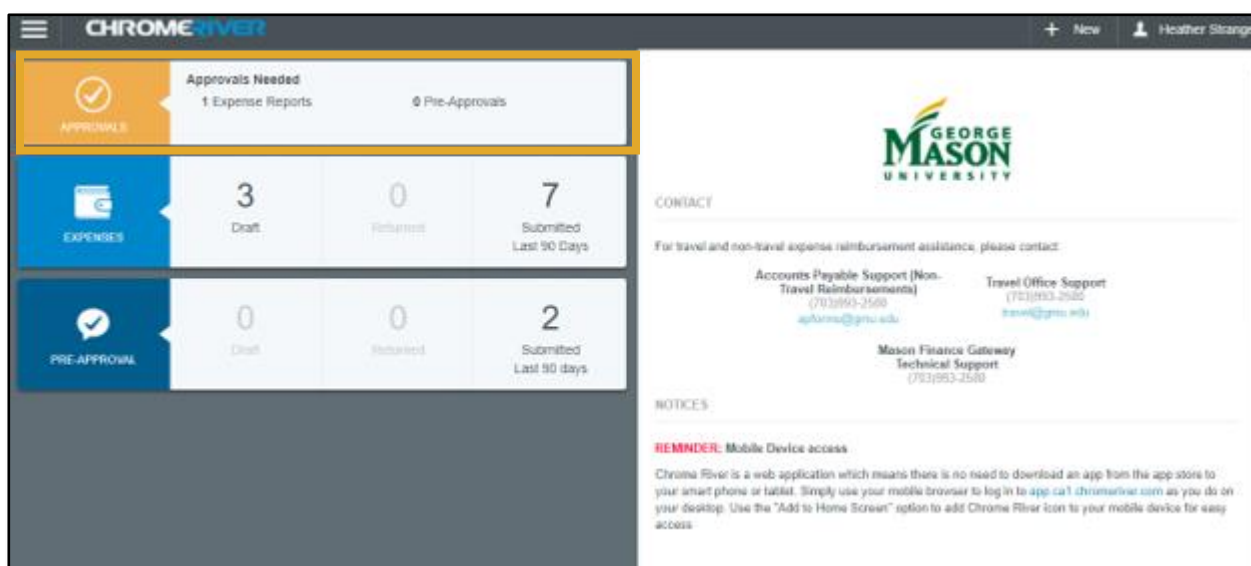
View Receipts

MFG – Approve Documents

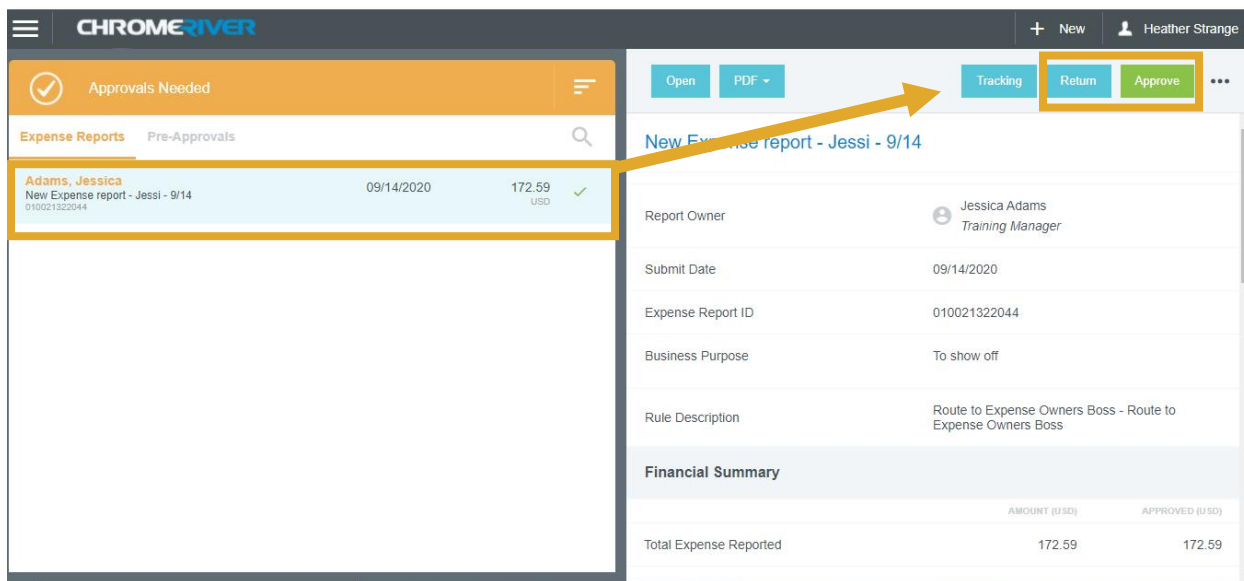
Use this guide to Accept, Return, or Reassign document approval in the Mason Finance Gateway. Users may Accept or Return through email, but must login to the Mason Finance Gateway in order to Reassign approval to another user. A report of all approved documents may be run on an ad hoc basis by following the instructions in this guide.

Approver Action in the Gateway

1. Login to the [Mason Finance Gateway](#). (Single Sign on with 2FA is required, [click here](#) for more info)
2. On the Summary Dashboard, you will see pending items in the **Approvals Ribbon**. Click on the Expense Reports link to open the approval que. *Note: if you do not have any pending approvals, the Ribbon will not display.*

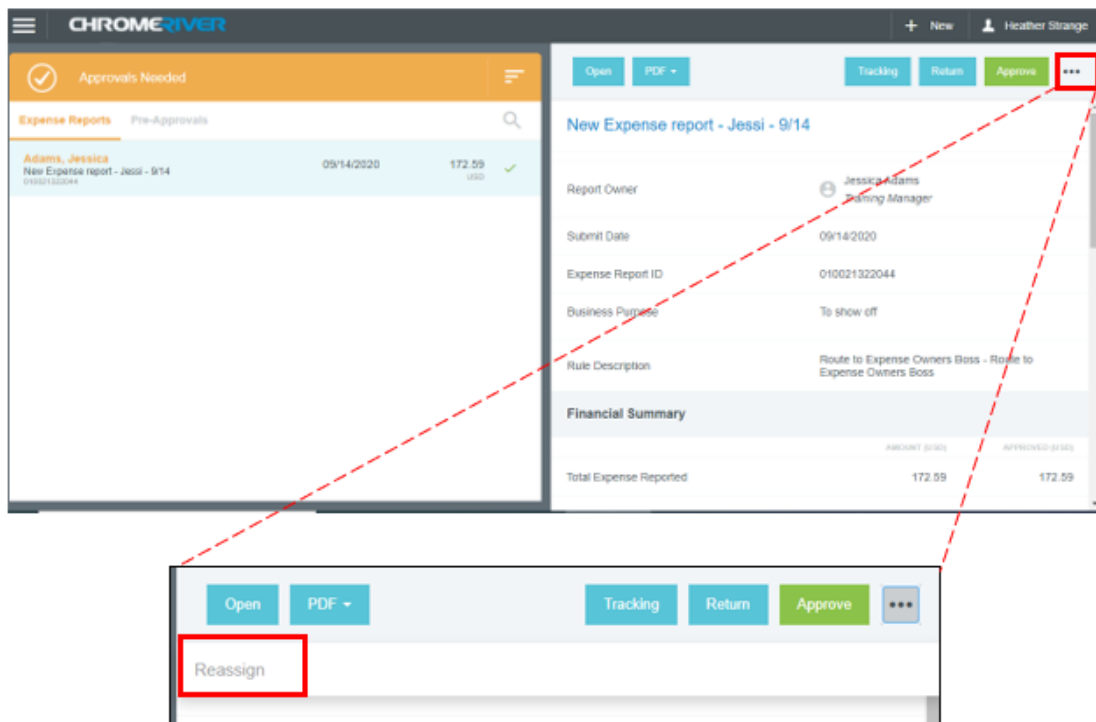


In the Que, click on the item you wish to view. To the right you will see the options.



3. Click **Approve** – to accept the document and continue the workflow. Review the Certification and then click **Submit**.
 - a. Click **Return** – to send the document back to the user for corrections. *Note: Once **Returned**, the user can only edit existing line items but may not add additional line items. If the approver notices a missing expense item, they should instruct the user via email to “recall” the transaction in the Gateway in order to add the additional item and then resubmit to the Approver.*

To **Reassign** the document Approval to another user, click on the Ellipses (...)



4. A search box will pop up. Type the name of the person who you wish to “Reassign” the Approval to. It will populate the individual's name and title. Add a note if you desire. Then click the **Reassign** button.

Reassign Report

Becky Klein - Associate Director - Purchasing

Please Approve for Grant funds.

Cancel

Reassign

You will see a pop-up that states “*You have reassigned this approval*” and the transaction will be removed from your *Approval* que. The individual who was assigned the approval will receive an email and the document will appear in their *Approval Dashboard*.

5. The transaction(s) will show up with the new Approver listed on the Tracking report when viewed by the User.

Tracking for New Expense report - Jessi - 9/14			
EXPENSE TYPE	AMOUNT (USD)	STATUS	CURRENTLY ASSIGNED
Mileage	115.10	Pending Approval	Becky Klein
Mileage	57.49	Pending Approval	Becky Klein

Approver Action via Email

You will receive an email every time a document is ready for your review and approval. You may **Accept** or **Return** directly from the email. You can review transactions and open attachments from the email. After you click an option a new formatted *Reply* email box will open. If you wish to add comments, type them into the top of the email and then click **Send**. Your action will be recorded in the Mason Finance Gateway.

expense-noreply-c5-prod@cal.chromesilver.com | Heather Strange

Chrome River Expense Approval [Gerri Nickle]

Report ID: 0100-2150-4997

ACTION REQUIRED Chrome River

Expense Report for: Gerri Nickle [Application Analyst]
Report Name: Test cash advance return
Submit Date: 10/15/2020
Expense Dates: 10/15/2020 - 10/15/2020
Total Expenses: 407.00 USD
Prior Approvers: Becky Klein [10/16/2020 GMT]
Gerri Nickle [10/15/2020 GMT]
Start Date: 10/05/2020
End Date: 10/09/2020
Business Purpose: Reason -test cash advance return
Country: United States
Destination: Destination-test cash advance return
bl_udf_GWorEmployee: Search for G# or Name
bl_udf_GStudent: Search for G# or Name
bl_udf_Purpose: Employee Travel - Domestic
Payee: Employee

Account Summary Amount (USD)

10111-	421701-Finance	ORGN: Finance & Administration /	407.00
421701-	Administrative Systems	PRGM: Institutional Support	
60100	Team		

Expense Details

10/15/2020	Conference /	ORGN: Finance & Administration /	100.00
	Seminar	PRGM: Institutional Support	USD
	10111-421701-	421701-Finance Administrative Systems Team	
	60100		

Business Purpose: Reason -test cash advance return
Description: conference
bl_udf_ACTV: null
Receipts: [View](#)

Financial Summary Amount (USD)

Total Expense Report	407.00
Less Company Paid	0.00
Amount Due Employee	407.00

[View Receipts](#) Report ID: 0100-2150-4997

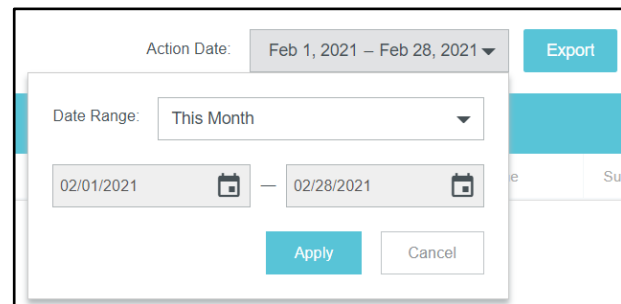
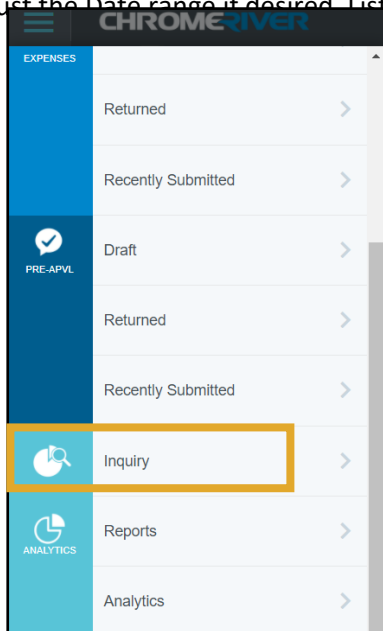
[ACCEPT](#) [RETURN](#)

You can view a transaction receipt by clicking View

Click Accept to approve the request.
Click Return to reject and return the document to the user.

Approval Report

1. Login to the [Mason Finance Gateway](#). (Single Sign on with 2FA is required, [click here](#) for more info).
2. Open the Navigation menu and select *Inquiry*. Then, choose *Expense – My Expense Approval Items*.
3. Adjust the Date range if desired. List of recorded approvals will display.



Adjust the Report Data by customizing the timeframe.

