Flagging a transaction to send it back

A p-cardholder's supervisor or department head for a department card may flag a transaction that is pending their sign off to send it back for updates. You can also email Purchasing to flag the transactions for you.

1   Navigate to Works

2   Click "Expenses"

3   Click "Transactions"

4   Click "Approver"

5   On the Pending Sign off tab, adjust the date range if needed.

6 Click "Month-to-Date"

BANK OF AMERICA

Purchasing Approver ⌄ ? 📞 ⬅

Works

Home   Expenses   Reports

🏠 / Expenses / Transactions / Approver

Lewis-Clark State College

Transactions - Approver

<<   Pending Sign Off   Signed Off   F

Clear Filters   Columns ▾

Advanced Filter

☐ Date - 11/27/2024 - 03/07/2025   ↻

11/27/2024 - 03/07/2025   ▦
☐ Retain settings

Comp|Val|Auth   Allocation   A
All

☐ Group - All   ↻
☐ Account - All   ↻
☐ Amount Range - All
☐ Dispute Status - All
☐ Account Status - All

1078   ✓ | ✓ | ✓   10-10-918102-5-5720

Search   Reset

Select Dates   ☒

5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February 2025

						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

March 2025

						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

April 2025

| | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |

◄   MM: 11   DD: 27   YY: 2024   ►
3   7   2025

○ Custom   ○ Selected Week
○ Month-to-Date ○ Selected Month
○ Cycle-to-Date ○ Selected Cycle
○ Year-to-Date   ○ Today

○ Previous Week   ○ Past 30 days
○ Previous Month ○ Past ___ days
○ Previous Cycle

Apply to Date Posted ▾

OK   Cancel

1 Selected | 1 item   Show 10 ▾ per page   Page: 1 of 1

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7 Click "OK"

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Works

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<<   Pending Sign Off   Signed Off   F

Clear Filters   Columns ▾

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Search   Reset

Select Dates   ☒

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April 2025

| | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |

◄   MM: 3   DD: 1   YY: 2025   ►
3   7   2025

○ Custom   ○ Selected Week
● Month-to-Date ○ Selected Month
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○ Previous Week   ○ Past 30 days
○ Previous Month ○ Past ___ days
○ Previous Cycle

Apply to Date Posted ▾

OK   Cancel

1 Selected | 1 item   Show 10 ▾ per page   Page: 1 of 1

8   Click Search

9   Find the transaction to send back.

10 Click the drop down arrow, then select Raise Flag.

11 Enter any comments related to why the transaction is being sent back, if needed. The p-cardholder/p-card manager will see these comments on the transaction.

For example, indicate a cost center needs to be updated or a receipt attached.

Click Ok.

The transaction will now be available in the Flagged section for the p-cardholder/p-card manager to update.