

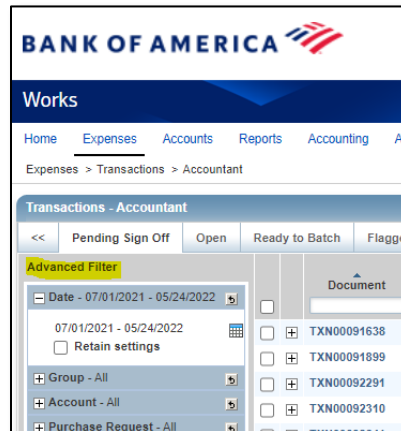
## Tips for Plant – Bank of America Works

When is a Pcard Purchase Request Form Required?

Tool Purchases	Transaction Total = \$500 or more	Transaction Total = \$1500 or more
All Departments	Repair Shop, Grounds Shop, Plumbing Shop, Fleet Service, Carpenter Shop, Paint Shop, Custodial and Environmental/Health/Safety	HVAC, Lock Shop, Central Stores and Electric Shop

### Completing Action Items

- 1) Once logged into the BOA Works system, click on the link to your Pending or Flagged transactions from your dashboard.
- 2) The system will default to list transactions from the last 3 months. In order to see all outstanding transactions, you must always update your date range and then click Search. This is found in the left-hand corner under Advanced Filter.



### Pending Transactions

- Complete the allocation
- Attach itemized, legible receipts
- If the pre-purchase form is required, attach the email thread showing John Fritsch's approval
- Make any comments or include information in the reference field as needed
- Sign off

### Flagged Transactions

- Review comments regarding the flag
- Make corrections or add attachments as needed
- Remove flag and add comment confirming the update that was made