Completing Action Items in Bank of America Works
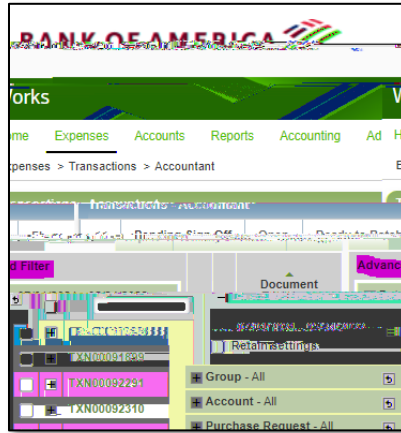
1) Once logged into the BOA Works system, click on the link to your Pending or Flagged transactions from your dashboard.

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.

Tip – You can update your date range to span the current fiscal year and then check the Retain Settings box, so you don't have to update this every time you log into the system.
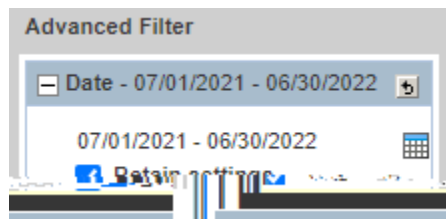
ACCOUNT HOLDERS	APPROVERS

Pending Transactions

- x Complete the allocation
- x Attach receipts/backup documentation
- x Make any comments or include information in the reference field as needed (refer to Pcard Reference Guide)
- x Sign off

Flagged Transactions

- x Review comments regarding flag
- x Make corrections or add attachments as needed
- x Remove flag and add comment