1. You may change the default Driver worktags in Works. To initiate this change, complete the PCard application/change form and indicate the new driver worktag you would like associated with your pcard. Please note that optional worktags cannot be part of the default driver worktag. As with Workday, you must select all of the optional worktags that are appropriate for the transaction.

2. When Brown went live with Bank of America WORKS, faculty accounts did not require review/approval by the faculty accountholder but instead were approved by the department manager. This process has been updated and faculty now have a choice: they may either keep approval process with the department manager or they can review/approve their own transactions. To change ability in WORKS for faculty to review and approve transactions, the faculty member can contact the pcard-administrator@brown.edu.

3. The Bank of America PCard cycle ends on the last business day of each month. Accountholders and Approvers have until end of the first business day of the following month to review and approve transactions.

4. An Accountholder can add receipts to a transaction even after the business cycle closes. Click on expenses and select transactions and accountholder. You will be brought to a screen of transactions that are pending sign-off. Click on the tab "signed-off" to select transactions from the previous business cycle. Locate the column "uploaded receipt" and click on the word "yes" or "no". A pop-up box will give you the ability to add a receipt.

5. Split charges can be allocated by dollars or by percentage. To allocate a transaction, click on the transaction and view full details. In the allocation and details tab, move your cursor to the value column above the transaction amount where you may choose either “amount” or “percent” for allocation.

6. You can view the reason a transaction was declined directly in WORKS. On your home page/accounts dashboard, click on the last four digits of your account ID and select “view auth log”. The log that appears will provide the reason the transaction was declined.