

# Northwestern State University



**Bank of America WORKS  
Approver Training**

# How – To Guide

[Approver Sign Off Policy](#)

[Supporting Documentation Requirements](#)

[Log On Instructions](#)

[Transaction Approval Review](#)

[Viewing Transactions](#)

[Sign Off / Raise Flag](#)

[Populating Transactions](#)

[Quick Steps](#)

[Contact](#)

# APPROVER SIGN OFF POLICY

**IMPORTANT:** Approver must sign off on all transactions in WORKS before the Cardholder's monthly credit limit will refresh.

- Must ensure each Cardholder's transaction, to the best of Approver's knowledge is for official state business, not for personal use and in compliance with travel rules, laws and regulations and/or PPM49 as applicable.
- Review and verify all the information and original receipts and complete supporting documentation entered and scanned into Workflow and submitted by the Cardholder are tied to the appropriate transaction in WORKS.
- *NOTE: Make sure receipts include a detailed line-item description and not generic descriptions.*
- Receipts do not include Louisiana state sales tax.
- If the information is not correct, Approver will flag the transaction, and it is electronically returned to the Cardholder for additional information and/or correction.
- All transactions must be approved in WORKS by the Approver.
- Sign off in WORKS must be completed by Cardholder and Approver no later than 10 days after any transaction. Failure to comply may result in card cancellation.

# SUPPORTING DOCUMENTATION REQUIREMENTS

Cardholder will attach the receipt and supporting documentation to the applicable transaction(s)

Allowable State Liability Travel Card Transactions:

- Group Travel
- Airfare
- Registration for Conference/Workshop
- Hotel/Lodging
  - Parking – ONLY with hotel stay and combined on the invoice.
  - Internet Services – ONLY with hotel stay and combined on the invoice.
- Rental Car
  - Gasoline for Rental Car ONLY – Not Personal Car.
- Tolls in conjunction with the contracted vehicle rental.

[Back to top](#)

## SIGNED REQUEST FOR AUTHORIZED TRAVEL MUST BE ATTACHED TO EACH TRANSACTION

### Rental Vehicle

- Zero balance receipt from Enterprise (Rental Agreement Summary is not a receipt)
- If a vehicle over standard/intermediate size is requested a list of passengers must be provided

### Rental Fuel

- Original Receipts
- Proof of Rental (Rental Receipt/Vehicle Rental Form)

### Hotel

- Zero balance hotel folio
- Room Roster (If not single occupancy)
- Proof of Conference Hotel Rate

### Registration

- Paid Receipt

### Flight

- Full Paid Receipt

# LOG ON INSTRUCTIONS

- Go to the following web address:  
<http://www.bankofamerica.com/workonline>
- Bookmark the login screen once it appears on your desktop, for ease of access in the future.

Note: Do not save the link from the Welcome Email received from Bank of America Works

- Bank of America Works link will be posted on the Business Affairs Travel webpage.

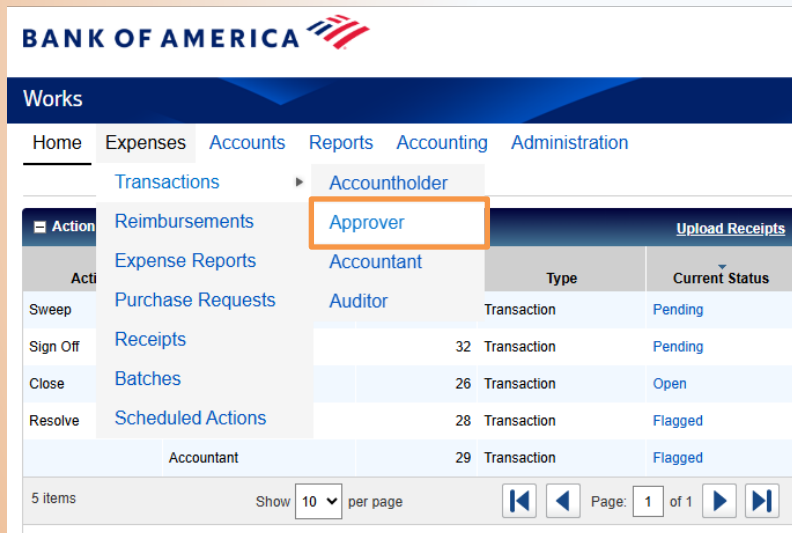
- Email address – enter your full NSU email address.
- Login Name – your Login Name is your full NSU email address.
- Password – enter your Bank of America password, which was created from the Welcome email during setup.

*If you have forgotten your password, please contact [travel@nsula.edu](mailto:travel@nsula.edu) to have a temporary password generated.*

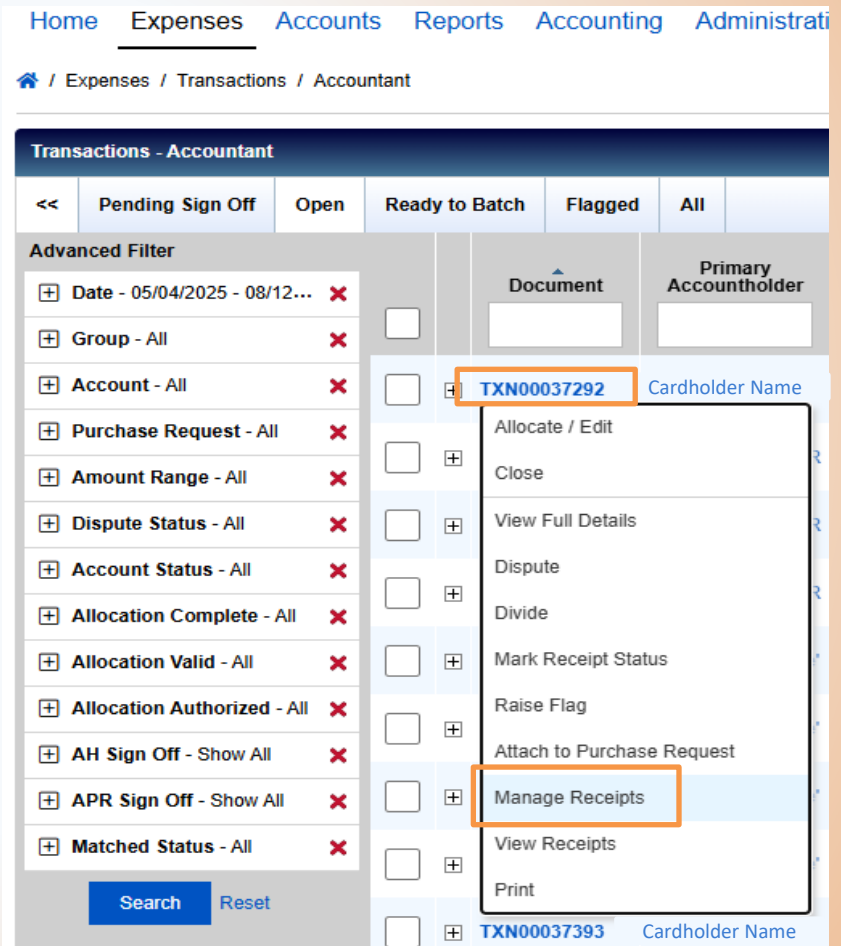


# Transaction Approval Review

On the Home Page under Expenses>Transactions>Approver.



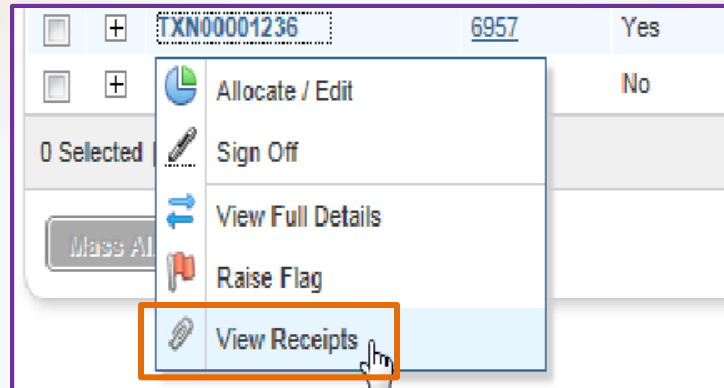
The Pending Sign Off screen is displayed. Click the Document number (TXN number)



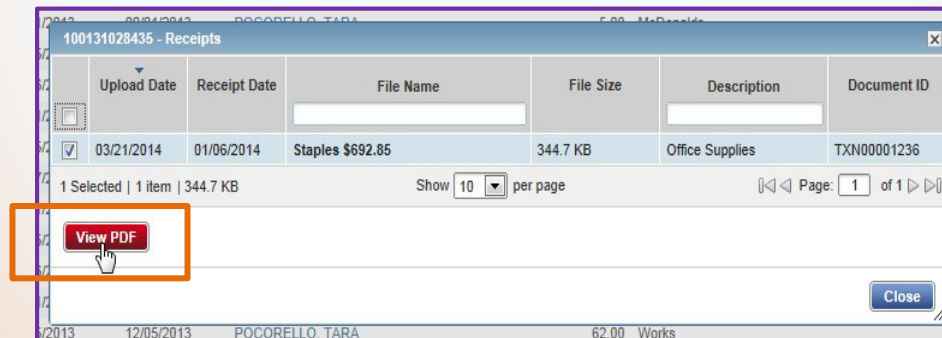
Select Manage Receipts.

# Viewing Transactions

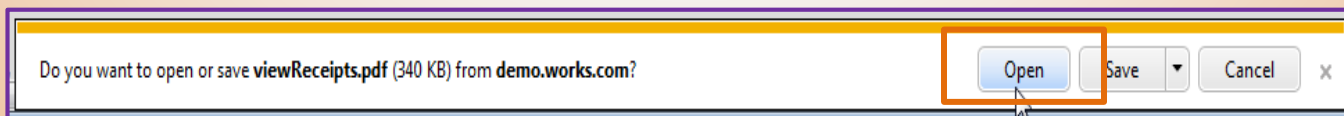
Click on TXN and click **View Receipts**



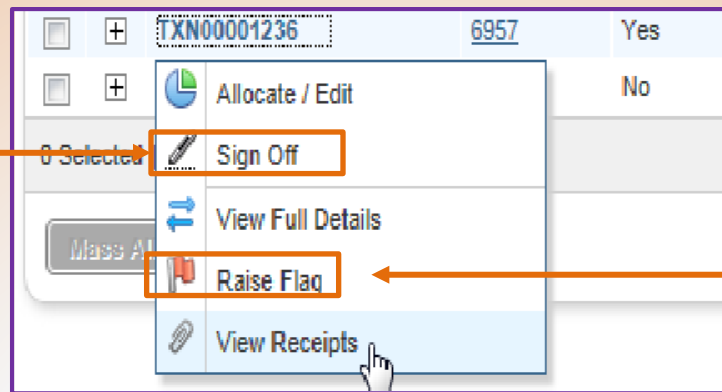
Click **View PDF**



Click **Open** and the receipt appears in the scanned format.



# Sign Off



# Raise Flag

**Sign Off** - If receipt supports the transaction and all necessary documentation has been attached you are ready to approve.

Click the **Actions** (upper right corner) drop down and click **Sign Off**.

The Confirm Sign Off screen displays.

Click **OK** to complete the approval process.

**Raise Flag**- If receipt does not support the transaction and all necessary documentation has not been attached you will need to flag the transaction

Click the **Actions** (upper right corner) drop down and click **Raise Flag**.

The Raise Flag screen displays and a reason for the flag will need to be entered.

Click **OK** to return the transaction to the cardholder for correction.



# Populating Transactions

Transactions - Accountant

<< Pending Sign Off Open

Advanced Filter

☒ Date - 05/03/2025 - 08/11/2025 ☐ Retain settings

☐ Group - All

☐ Account - All

☐ Purchase Request - All

☐ Amount Range - All

☐ Dispute Status - All

☐ Account Status - All

☐ Allocation Complete - All

☐ Allocation Valid - All

☐ Allocation Authorized - All

☐ AH Sign Off - Show All

☐ APR Sign Off - Show All

☐ Matched Status - All

Select Dates

MM DD YY

7 1 2024

8 11 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 30 days

☐ Previous Cycle

1. Select the drop-down menu for the date from the left-hand navigation menu
2. Click the calendar to Select dates
3. Adjust date range
4. Click OK
5. Click Search to prompt the new date range to populate

# Quick Steps

1. Log In using your full NSU email address as your username
2. From the Home Screen in the Action Items box click “pending” in the Approver category.
3. Select the TXN #
4. Click “View Receipt”
  - Verify that the correct receipt and all necessary support documents are attached
5. Select the TXN # Again
6. Click Sign Off if all documents are attached or Raise Flag if the documents need correcting.

**The transaction will disappear from your queue once you select sign off.**

# Business Affairs - Travel



**Contact NSU Business Affairs/Travel if you have forgotten your password, been locked out of your account, or have any questions.**

Bank of America Works: <https://payment2.works.com/works/home>

NSU Travel Site: <https://www.nsula.edu/businessaffairs/travel/>

Email: [Travel@nsula.edu](mailto:Travel@nsula.edu)

Contact: Jennifer Breedlove 318-357-4384

Stephanie Cormane 318-357-6812