**How to Sign Off on a Transaction in Works**

After all necessary changes to the accounting information have been made (See Reconciliation in Works for more information) and after the documentation for Pcard charges has been obtained, the Pcard transactions should be signed off on by both the cardholder and approver as an acknowledgement of reconciliation. To sign off on a charge in Works, first login to the system.

**Cardholders**

If you are a cardholder, you will see one selection that says Action Required – Sign Off, Acting as – Cardholder. These are the transactions that have posted to the system that you have not signed off on.

**Approvers**

If you are an approver, you may see two Action Required - Sign Off options; one acting as Manager and one acting as Cardholder. If your cardholder has signed off on the transaction, then the transaction will appear in the Action Required - Sign Off, Acting as Manager. If the cardholder has not signed off on the transaction then the transaction will appear in Action Required - Sign Off, Acting as - Cardholder. In most cases you as the approver will only want to sign off on transactions that have already been signed off by your cardholder. This is because if you sign off on the transactions before the cardholder, the cardholder will not see the charges and will not have a chance to reconcile them. However, if you have a situation where your cardholder is unable to sign off on the transactions, you as the approver will want to sign off on those transactions for them.

**Selecting the Transaction**

To change the accounting information or to sign off on charges, select the Action Required - Sign Off line on your home screen. Doing so will bring you to a review page that contains all of the transactions that have posted to the system for the current cycle. Select the transaction you want to sign off on so that it is highlighted in yellow.

**Sign Off**

If you do not need to change the accounting information or if you have already done so, you will now need to sign off on the transaction. To do so select the transaction so that it is
highlighted in yellow on the top portion of the screen and select Sign Off on the bottom right hand corner. A Comments box will automatically appear for you so that you may add comments about the transaction. Make your comments and then select Okay and the transaction will be signed off on. Please be aware that once a transaction is signed off on by the cardholder, the cardholder can no longer make any comments or accounting changes. Once the transaction is signed off by the approver, no one including the Pcard team can make changes to the transaction.