INSTRUCTIONS TO LOAD RECEIPTS/DOCUMENTATION INTO WORKS

Works will accept and compress non-PDF documents (.png, .jpg, .gif, .jpeg) up to 10MB and will accept PDF documents up to 1MB. Scan to your email and save to your desktop. Please scan or save at a low resolution if you have multiple pages. Instructions are below. Receipts must be attached prior to cardholder sign off and prior to the deadline. At this time, all original statements and receipts/documentation must still be sent to the ProCard office. Receipt images are retained for a period of seven years.

To utilize the attachment option in WORKS:
- Login to Works.
- From Home Page, click "pending" under Action Items.
- Hover over the TXN number
- Select "manage receipt."
- When you click "manage receipt," it will walk you through attaching the receipt and other backup documentation that belongs with a transaction.

To scan at a low resolution on the copier:
- Click "Scan"
- Select "Scan Settings"
- You will see the resolution settings.
- Set it at 200% or scroll down to page 2 and under "compress," select "high."
- Then scan, as normal.

To make a PDF smaller:
- Open the file in Adobe Acrobat
- Click File
- Save As
- Optimized PDF…
- Make sure the Images check box is checked in the right Column.
- In the right options section 'Image Settings' box, change each of the number values to 90 ppi for images above 135 ppi.
- You can also check all the other boxes in the right column to make file even smaller, but that may not be necessary.
- This should get all files under 600kb.

For <u>Foundation Fund</u> purchases/payments, the following supporting documentation <u>is required</u> be entered/scanned into WORKS so that the Foundation office can review:

- Business purpose that fits the purpose of the foundation fund being used. (When you approve the transaction, the box will automatically pop up.)
- Documentation of fund manager or proxy approval of the purchase, depending on amount of the purchase and delegated authority levels. If there are questions regarding this, please contact the Foundations Office.
- A copy of the itemized receipt listing all items purchased.
- Any other supporting documentation that is required, such as agenda, attendees list or other related support. Please do not scan in any personal information, such as social security numbers or patient related information that would be subject to HIPAA.