

ProCard to Bank of America Works: Transition Roadmap

FHDA is transitioning ProCard operations to the Bank of America Works platform. This guide outlines the phased rollout, defined roles for organizational clarity, and the essential sign-off steps required to maintain active card funds.

Implementation & Support



TRAINING & SUPPORT SCHEDULE

IN-PERSON TRAINING (MAY 11-13) Board Room 101

- Monday, May 11: 10:00 AM - Central Services
- Tuesday, May 12: 2:00 PM - De Anza
- Wednesday, May 13: 11:00 AM - Foothill

ZOOM SIGN-UP SESSIONS (MAY 14-15)

Morning and afternoon virtual sessions available for remote sign-up support.

CONTACT YOUR CAMPUS POWER USER for first-line support

- Trena (CS)
- Danmin (FH)
- Pippa (DA)

Support Ecosystem

Get help via Teams Chat, campus power users, and Zoom drop-in sessions.

Close the "Sign-Off Gap"



Cardholder/Proxy

Cardholders and proxy reconcilers must click the "Sign Off" button to bridge the gap and make transactions visible to supervisors for review

THE SIGN-OFF WORKFLOW: THE BRIDGE TO SUPERVISOR VISIBILITY



FINAL REVIEW & APPROVAL



Supervisor/Secondary Approver

PREVENT TEMPORARY CARD DEACTIVATION

If the "Sign Off" step is skipped, transactions remain invisible to supervisors and cannot be approved.

DEFINED ACCOUNTABILITY ROLES

Cardholder/Proxy:
Coding & Signing Off

Supervisor/Secondary Approver:
Final Review & Approval

Date	Time	Session/Location
Monday, May 11	10:00 AM	Central Services
Tuesday, May 12	2:00 PM	De Anza
Wednesday, May 13	11:00 AM	Foothill
Thu-Fri, May 14-15	10:00 AM & 1:00 PM	Zoom Sign-up Sessions

DEADLINE 5/31

LAST BUSINESS DAY DEADLINE
All approvals must be completed monthly to keep your card active and usable.