

THE STATE OF FLORIDA JUSTICE ADMINISTRATIVE COMMISSION

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COMMISSIONERS

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Add a Comment to a Works Charge Transaction

All transactions are to be cleared by the accountholder and the approver within seven (7) days of posting. As an accountholder, you are responsible for indicating why a transaction can't be cleared within the required time frame. For example, "The goods have not been received" or "The wrong amount was charged, waiting on documentation from the vendor". Remember, all comments are permanently added to the system.

Below is the outline of how to add a comment to a transaction. There are two (2) methods for adding a comment. Users choose the method that is easiest for them based on where they are or what they're doing in the system.

METHOD 1

To add a comment to a transaction, complete the following:

1. Select or hover over the Expenses menu, select or hover over Transactions, and then select Accountholder.



2. The Pending Sign-Off queue (tab) will be displayed. If necessary, select the Signed Off or Flagged Queue tabs.



3. Select the expand icon (+) next to a desired transaction. The transaction summary details are displayed.

Works				
Home Expenses	Reports			
Expenses > Transact	ons > Accounthold	ler		
Transactions - Acco	ountholder			
<< Pending Sign	Off Signed O	ff Flagged	All	
Advanced Filter				
+ Date - 08/30/2023	- 12/08/2023 5	- 7 -	Document	Group
+ Account - All	5		TXN02241426	2100 - JAC JAC HO OPERATIONS
Corporate Account	of All			

The Justice Administrative Commission administratively serves the judicial-related offices of State Attorney, Public Defender, Criminal Conflict and Civil Regional Counsel, Capital Collateral Regional Counsel, and the Statewide Guardian ad Litem Program. The JAC also performs compliance and financial review of court-appointed attorney and due process vendor bills. 4. Select Add Comment in the Comments section to display the Add Comment window.

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Account - All Corporate Account - All	5			TXN02241426		210	2100 - JAC JAC HQ OPERATIONS				<u>6401</u>	<u>x v v</u>		
+ Purchase Request - All	5		Trans	Transaction Allocation Refere			& Tax	ax Dispute					View Full Details	
🛨 Amount Range - All				Bank Transaction #: 24692163337100706534212					Account Nickname:					
🛨 Dispute Status - All	9				Purchase ID:	T905186605	202300			Account ID	: 6401			
+ Account Status - All				C	RI Reference:					Accountholde	-	Constanting the		
+ Allocation Complete - All					Vendor ID:	3174370002	13249							
+ Allocation Valid - All				Vendor Address: FL 33407							1			
+ Allocation Authorized - A													•	
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5. Select Add Comment, enter a comment in the box, and select OK.

METHOD 2

To add a comment to a transaction, complete the following:

- 1. Select or hover over the Expenses menu, select or hover over Transactions, and then select Accountholder, Approver, or Accountant.
- 2. The Pending Sign-Off transactions screen will be displayed. If necessary, select the Signed Off or Flagged Queue tabs.

*Note: Approvers cannot add comments to Signed-Off (closed) transactions.

3. Hover over the TXN number that needs a comment and select the dropdown under the Document column on the desired transaction to view the single action menu displays.



4. Select View Full Details. The Transaction Details screen displays.



5. Complete Steps 4 and 5 from Option 1 to complete the comment.