

LIFEWISE ACADEMY



EXPENSE ADMIN WALKTHROUGH

Congratulations! You have been selected as your program's Expense Admin. You should have already gone through the process to [set up your BILL \(formerly Divvy\)](#) account. Use the following directions to help you get started approving transactions.

Approving Transactions

You can log in to your BILL account in your web browser on your computer or by downloading the BILL Spend & Expense app on your smartphone.

Computer View

You will see incomplete and recent card transactions on your home screen. You can click on "Incomplete card transactions" on your home screen or "Transactions" in the left menu to view transactions that need approval.

LifeWise, Inc. / Dashboard / Recent activity

Recent activity

To-do list

- Approve more than 99 transactions

Incomplete card transactions >

Date	Status	Name	Merchant	Amount	Card	Budget
10/19/23	Incomplete	[REDACTED]	Starbucks	[REDACTED]	0616 - Physical Card	L000 LW Locations
10/18/23	Incomplete	[REDACTED]	Storefront Printportal	[REDACTED]	0616 - Physical Card	L000 LW Locations
10/14/23	Incomplete	[REDACTED]	Storefront Printportal	[REDACTED]	0616 - Physical Card	L000 LW Locations
10/13/23	Incomplete	[REDACTED]	Storefront Printportal	[REDACTED]	0616 - Physical Card	L000 LW Locations
10/13/23	Incomplete	[REDACTED]	Storefront Printportal	[REDACTED]	0616 - Physical Card	L000 LW Locations

Recent card transactions >

Date	Status	Name	Merchant	Amount	Card	Budget
10/19/23	Needs your approval	[REDACTED]	Sticker Mule	[REDACTED]	0616 - Physical Card	L000 LW Locations

1. You will notice that some transactions are marked "Incomplete," while others say "Needs Your Approval"
2. Incomplete transactions need to be completed **by the cardholder first**. Please reach out to your cardholder(s) if you are waiting for them to complete transactions **before you click approve**.
3. When a Transaction's status reads, "Needs Your Approval," it is ready for your review.

- To approve and review a transaction, click on the transaction. A menu will appear to the right with all the transaction details.

The screenshot shows the LifeWise, Inc. Transactions interface. The main view is a table of transactions with columns for Status, Date, Name, Merchant, and Amount. A transaction for \$124.00 from Sticker Mule is highlighted with a 'Needs your approval' tag. A side panel is open for this transaction, showing details such as the merchant name, amount, cleared/authorized dates, card number, and merchant location. At the bottom of the side panel are 'Deny' and 'Approve' buttons.

Status	Date	Name	Merchant	Amount
Needs your approval	10/19/23	[REDACTED]	Sticker Mule	\$124.00
Incomplete	10/19/23	[REDACTED]	Starbucks	
Incomplete	10/18/23	[REDACTED]	Storefront Printportal	
Incomplete	10/14/23	[REDACTED]	Storefront Printportal	\$2.00
Incomplete	10/13/23	[REDACTED]	Storefront Printportal	\$2.00
Incomplete	10/13/23	[REDACTED]	Storefront Printportal	\$4.00
Approved	9/26/23	[REDACTED]	Storefront Printportal	
Approved	9/16/23	[REDACTED]	Storefront Printportal	\$1.00
Approved	9/16/23	[REDACTED]	Storefront Printportal	
Approved	9/16/23	[REDACTED]	Storefront Printportal	\$4.00
Approved	9/15/23	[REDACTED]	Lettering.com	

Please check the following details for each transaction **before clicking “Approve”**:

- Does the receipt match the transaction amount and description?
- Did the cardholder select the appropriate budget line?
 - ◆ If you are unsure about a budget line, please refer to [this document](#) or submit a support ticket for help
- Did the cardholder select the appropriate class?
 - ◆ If you are part of a program (i.e., not Support Center staff), always choose PROGRAMS
- Did the cardholder include an appropriate description to document what this purchase was for?
- Did the cardholder select the appropriate fund?
 - ◆ Double-check that the correct program fund is selected (This should be your L number.)
- Did the cardholder select the appropriate location?
 - ◆ Note: This will always be E01

If you need to make corrections to any of the items above, please also reach out to the cardholder and explain the correction you made so they understand for the future.

Once all of these items check out, click “Approve.” You should see a confirmation pop-up verifying that the transaction was approved, and the status should now read “Pending Approval.”

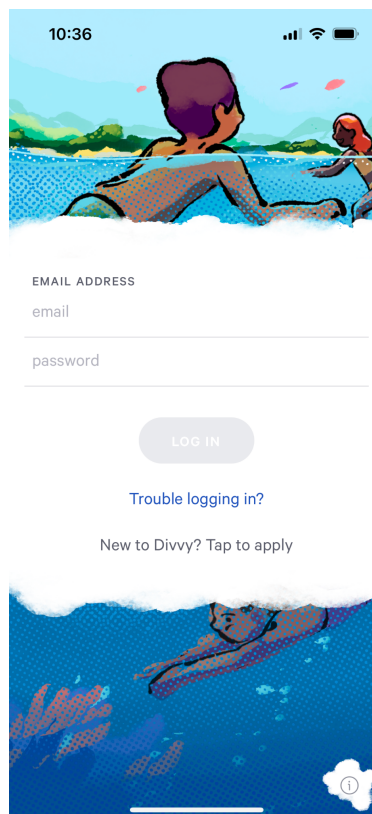
All transactions need to be completed and approved for the previous month by the 5th of the new month. (For example, all October transactions need to be completed and approved by November 5th.) Programs with incomplete and/or non-approved transactions by the 5th are subject to a **late transaction fee of \$10 per transaction**.

Smartphone View

1. Go to your App store and download the BILL Spend & Expense app. The icon looks like this:

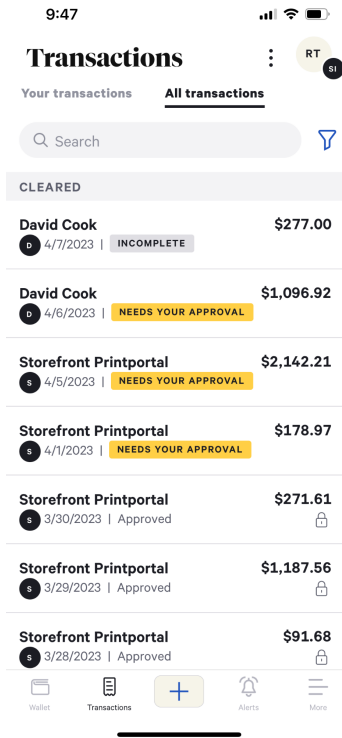


2. You will log in with the credentials you set up

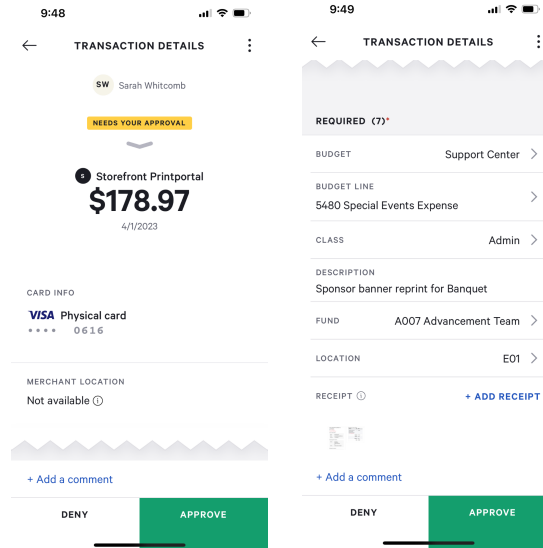


3. Once you sign in, you will be asked for an authorization code texted to the phone number you provided during setup. You will also be asked to authorize the device you are using. You will need to access your email **from your phone** in order to do this.

- ◆ Go to your email from your phone and find the email from BILL
- ◆ Select “Verify device”
- ◆ Then you should automatically be taken back to the BILL Spend & Expense app
- ◆ You can set a PIN or bio-authentication for easy login in the future
- ◆ Once you are in the app, Transactions from your assigned cardholder(s) should be the first thing you see.



4. You will notice that some transactions are marked “Incomplete,” while others say “Needs Your Approval”
5. Incomplete transactions need to be completed **by the cardholder first**. Please reach out to your cardholder(s) if you are waiting for them to complete transactions **before you click approve**.
6. When a Transaction’s status reads, “Needs Your Approval,” it is ready for your review.
7. To approve and review a transaction, click on the transaction and review the details.



Please check the following details for each transaction:

1. Does the receipt match the transaction amount and description?
2. Did the cardholder select the appropriate budget line?
 - ◆ If you are unsure about a budget line, please refer to [this document](#) or submit a support ticket for help
3. Did the cardholder select the appropriate class?
 - ◆ If you are part of a program (i.e., not Support Center staff), always choose PROGRAMS
4. Did the cardholder include an appropriate description to document what this purchase was for?
5. Did the cardholder select the appropriate fund?
 - ◆ Double-check that the correct program fund is selected (This should be your L number.)
6. Did the cardholder select the appropriate location?
 - ◆ Note: This will always be E01

If you need to make corrections to any of the items above, please also reach out to the cardholder and explain the correction you made so they understand for the future.

Once all of these items check out, click “Approve” and then “Approve Transaction”. You should see a confirmation pop-up verifying that the transaction was approved, and the status should now read “Pending Approval.”

All transactions need to be completed and approved for the previous month by the 5th of the new month. (For example, all October transactions need to be completed and approved by November 5th.) **Programs with incomplete and/or non-approved transactions by the 5th are subject to a late transaction fee of \$10 per transaction.**

If you have any questions, read our answers to [Frequently Asked Questions](#) or submit a support ticket.