PREP - Processing Transactions on Behalf of a Cardholder

1. **Login to PREP and go to User Administration**
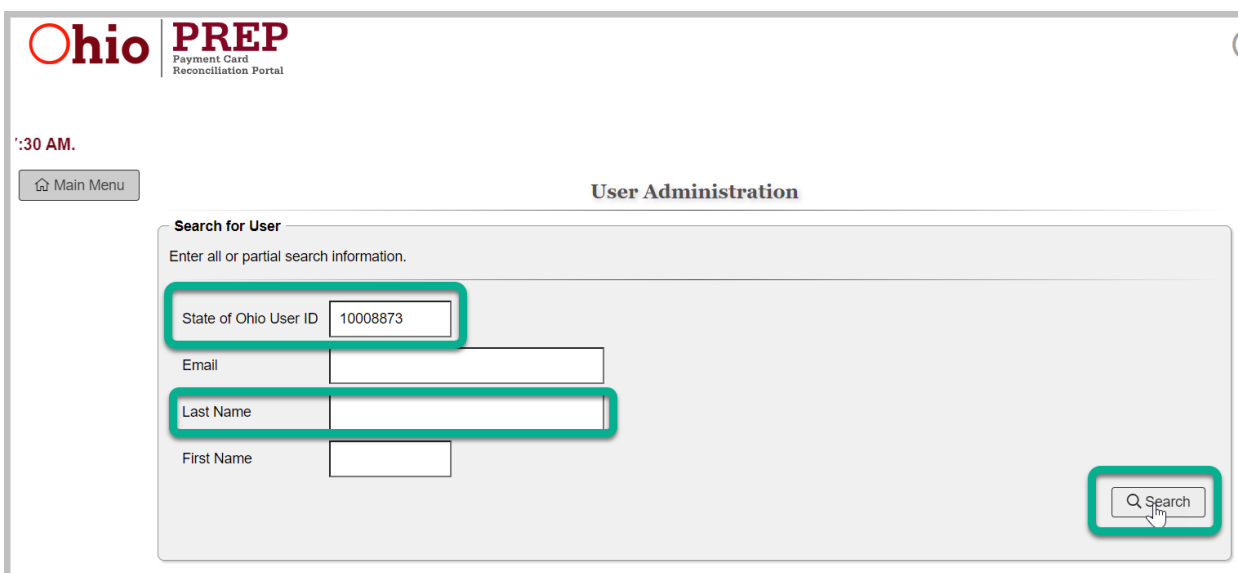

2. **Search for the user by entering employee ID or last name**

3. **Click 'Select' in the row where the user's information is found**

Search for User

Enter all or partial search information.

State of Ohio User ID 10008873

Email

Last Name

First Name

	eMail/UserId	Last Name	First Name	State of Ohio User ID	Phone Number
Select	Jason.Bartholow@obm.ohio.gov	Bartholow	Jason	10008873	

⊕ Add New User

4. **Remove the Cardholder role by clicking 'Deactivate' on the row for the Cardholder role**

Last Name:	Ferguson	
First Name:	Donnita	
Phone:		
Active:	☑	
		Add Access

Agency Code	Role	Queue	Active	
OBM	Cardholder		True	Deactivate

5. **Choose whether to notify the user**

Send User Email Notification?

○Yes ○No

6. **Go back to the Main Menu and click on the Cardholder Exceptions button**
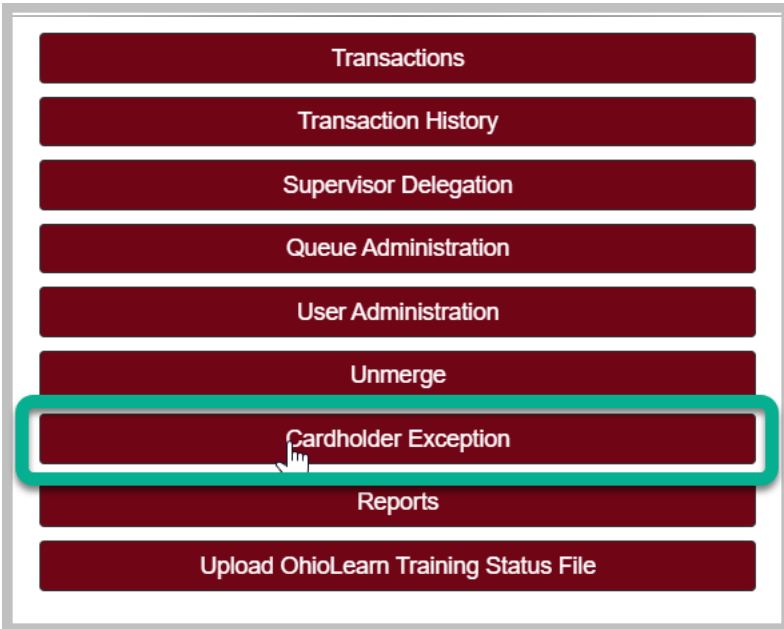
7. **On the left side of the grid there are two pencil icons. Click the pencil in the first column in the row for the cardholder's transaction**

Action	dd User	Cardholder Name	Employee ID	Transaction Date	Transaction Amount	Merchant Name
		Cason, Pearl	10045588	9/24/2021 12	308.55	ENGINEER SUPPLY LLC
		Cason, Pearl	10045588	9/27/2021 12	155	SQ *WHITE OAK ENVIRONM
3		Green, D Keith	10007311	9/15/2021 12	127.69	PERKINELMER HEALTH
4		Green, D Keith	10007311	9/15/2021 12	-127.69	PERKINELMER HEALTH

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8. **From here, you can select the queue and enter the Item/Service Description**

9. **Click Next**

10. On the next screen, Add Documents and click to 'Approve' the transaction

11. When the user returns, go to User Administration and reactivate the Cardholder role

12. Process complete