Reviewer Functions:

Reviewer is responsible for logging in to Intersect and providing the final independent review and approval of the Cardholder’s P-Card receipts and monthly statements. The Reviewer also has the ability to view Cardholder transactions and receipts, enter notes and change departmental FOAP/account codes, if needed.

The Cardholder must have selected the “Rev” (Review) checkbox for each transaction before the Department Admin can select the “App1” (Approve) checkbox and the Reviewer can select the “App2” (Approve 2) checkbox. An error will occur if both approval checkboxes are not selected. Once transactions are marked as “App1” by the Department Admin and “App2” by the Reviewer, no additional changes can be made.

Cardholder logs in to Intersect and attaches receipts and selects “Rev” checkbox > Dept. Admin logs in to review transactions, change coding, enter notes and attach receipts; and selects the “App1” checkbox > Reviewer logs in to provide final approval; change coding, enter notes and attach receipts, clicks “App2” check box.

From the Intersect Homepage, Reviewer can access Cardholder transactions by clicking on Quick Links – Manage Transactions.
Then, go to Transaction Maintenance>Transaction Management and select “Search” to view all transactions or enter Search Criteria to only see transactions that were “Reviewed” by the Cardholder. Search criteria can also be entered by the Cardholder’s first and/or last name. Below are a few suggested search criteria.

- The below search criteria will only show transactions that have been reviewed by the Cardholder and may be approved by the Department Admin.

If in mid-billing cycle and the Reviewer approved some Cardholder transactions, the following would be a good option for search criteria. This will display transactions that a Cardholder has reviewed, a Department Admin has approved “App1”, but the Reviewer has not checked the “App2” checkbox yet.
The Reviewer can select the Transaction Details button to go to the screen where receipts are attached.

**Viewing Receipts**

< Click “Transaction Details,” receipt can be viewed at the bottom of the screen.
To mark each transaction as approved, the Department Admin will click the “App1” (Approved) checkbox and the Reviewer will click the “App2” (Approved 2) checkbox in the following areas:

1. In the Transaction Details screen above (see circled in red)
2. On the main transaction page under Transaction Maintenance>Transaction Management

The Reviewer can view Cardholder statements under Transaction Maintenance > Statements to approve monthly statements.