

I. Manage cardholders in your School/Center/ORG for business needs and financial risk management

1. How do you view for an active cardholder?

- a. Create “Card Stats – Indv” report in BoA WORKS® and select the “Card Active” filter to “Yes” (see Figure 1: “Card Stats – Indv” report) [Click here for detailed instructions on running this report.](#)
 - b. Remove the default filter, “Card Modify Date” under the Report Options.
 - c. Review all active cardholders and determine if any card account needs to be closed
- d. To submit a request to close a cardholder’s account, use the following [link](#):
- e. Figure 1: “Card Stats – Indv” report template without a filter

Create Report
Report data is current as of July 29, 2015 9:07 AM CDT.

* Category: ▼

* Template: ▼

Report Options
 Basic Advanced
[Reset to defaults](#) [Use last run settings](#)

Columns

Available	Selected	Column Sort
<div style="border: 1px solid #ccc; padding: 2px;"> <p>Card</p> <ul style="list-style-type: none"> Advice Template Card Account Number Card Accounting Code Card Activation Date Card Active Card Address 1 Card Address 2 Card Address Modify Date Card Advice Address Card Available Credit Card Available Funds Card Bank ID Number Card Cash Limit Card City Card Country Card Create Date Card Credit Limit Card Deactivation Date Card Delete Date Card Embossed Line 1 </div>	<div style="border: 1px solid #ccc; padding: 2px;"> <ul style="list-style-type: none"> Card Embossed Line 1 CH Payee ID Card Active Grp Name Card Last 4 Digits Card Credit Limit Card Current Balance Card Last Used CH Create Date Closed By User Full Name <div style="text-align: right; margin-top: 5px;"> <input type="button" value="Remove"/> <input type="button" value="Edit"/> <input type="button" value="Add Constant"/> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px;"> <p>Column Sort</p> <div style="text-align: right; margin-top: 5px;"> <input type="button" value="Remove"/> <input type="button" value="Reverse Sort"/> </div> </div>

Filters

Add filter: ▼

Card Modify Date: 11/18/2007 - 11/18/2014

Card Active: Yes No

2. *Does each cardholder have an adequate credit limit?*
 - a. Credit limit information for each cardholder is listed on the “Card Stats – Indv” report
 - b. The credit limit can be changed for business needs and risk management from the default credit limit of \$15,000 through Card Administration in \$5,000 increments.
 - c. [Submit](#) cardholder’s credit limit change request.