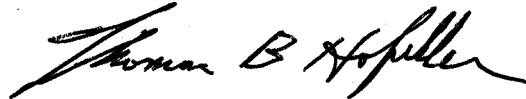


For: FFAS Employees

**USDA FFAS Mandatory Purchase Cardholder Training**

Approved by: Associate Administrator for Operations and Management



**1 Overview**

**A Background**

The Purchase Card Program reduces administrative costs and allows agencies to procure supplies and services faster by using purchase cards and convenience checks. This notice implements USDA policies and procedures for mandatory training of cardholders and approving officials as USDA transitions to the US Bank Purchase Card Program. USDA FFAS Purchase Card Program policy may be found in Notice AS-2156.

**B Purpose**

This notice:

- identifies mandatory cardholder and approving official training as required by OMB Circular A-123, Appendix B, and US Bank
- reminds Local Agency Program Coordinators (L/APC's) that their training has already begun and all L/APC's must complete this training by **November 30, 2008**
- provides a link to US Bank's web-based training at **<https://wbt.access.usbank.com>**
- establishes **January 30, 2009, as the date for completing all training** for purchase card holders and their approving officials.

<b>Disposal Date</b>	<b>Distribution</b>
March 1, 2009	All FAS, FSA, and RMA Employees; State Offices relay to County Offices

## Notice AS-2159

### 1 Overview (Continued)

#### C Contact

Direct questions about this notice according to the following table.

<b>IF there are questions about...</b>	<b>THEN...</b>
technical help for access online	L/APC's will contact US Bank Government Services <b>AOPC</b> technical support and program management at 1-800-254-9885; select Option 2, "access online technical assistance".  <b>Note: Cardholders and approving officials</b> may call 1-888-994-6722 and enter your 16-digit account number.
the transition to the new US Bank Purchase Card, including frequently asked questions	access the USDA Charge Card Service Center website at <b>www.usda.gov/procurement/ccsc</b> .  <b>Note:</b> Frequently asked questions are available on this site.
the website or the web training that are not addressed at the Charge Card Service Center website	send an e-mail to the Charge Card Service Center at <b>ccsc@da.usda.gov</b> .
procurement policy	contact Pamela Wellons, Chief, Kansas City Acquisition Branch, Acquisition Management Division, by either of the following: <ul style="list-style-type: none"><li>• e-mail at <b>RA.mokansasc2-PurchaseCard</b></li><li>• telephone at 816-926-6084.</li></ul>
FFAS Purchase Card program	contact Linda Worthington, APC, or Sheryl Welch (alternate APC), by either of the following: <ul style="list-style-type: none"><li>• e-mail at <b>RA.mokansasc2-PurchaseCard</b></li><li>• telephone at 816-926-6216 or 816-926-6108.</li></ul>

### 2 Training Information

#### A Mandatory Cardholder Training

**All** cardholders who will have a US Bank-issued purchase card are required to complete web-based training for certification.

Cardholders will be able to use their new purchase cards after November 30, 2008. If the required training is not completed by the January 30, 2009, the cardholder's account will be put in "inactive" status and will not be available for new purchases.

## 2 Training Information (Continued)

### A Mandatory Cardholder Training (Continued)

Cardholders shall:

- see Exhibit 1 for the memorandum, Mandatory Cardholder Training, for additional training instructions including the list of required cardholder training modules
- access training on the US Bank website at <https://wbt.access.usbank.com>
- use the password, "casper", to access the **cardholder web-based training**

**Note:** This password will be changed every 60 calendar days. APC/LAPC will provide the new password.

- complete all training by January 30, 2009
- forward training documentation to your APC/LAPC according to the Exhibit 1 memorandum to receive proper credit and avoid inactivation of the purchase card.

L/APC's shall monitor this training and inactive any cardholders who have not completed training as of February 1, 2009.

### B Mandatory Approving Official Training

Each cardholder must have an assigned approving official. The approving official is usually the cardholder's supervisor. An approving official who is also a cardholder must take both trainings. Individual modules that are duplicated in each training do **not** need to be taken twice.

Approving officials:

- are required to complete web-based training for certification
- shall see Exhibit 2 for the memorandum, Mandatory Approving Official Training, for further training instructions including required training modules
- shall access the training on the US Bank website at <https://wbt.access.usbank.com>

## Notice AS-2159

### 2 Training Information (Continued)

#### B Mandatory Approving Official Training (Continued)

- shall use the password "yellowstone" to access the **approving official web-based training**

**Note:** This password will be changed every 60 calendar days. APC/LAPC will provide the new password.

- shall complete the training by January 30, 2009

**Note:** If an approving official fails to complete the training by this date, accounts for all cardholders assigned to the approving official will be placed in "inactive" status. Any attempt to use the card will be declined at the point of sale.

- will forward training documentation and a list of all cardholders who are accountable to the approving official to APC/LAPC according to the Exhibit 2 memorandum to receive proper credit.

L/APC's shall monitor this training and inactivate

- approving officials who have not completed their training as of February 1, 2009
- all cardholders assigned to the approving official.

#### C USDA Training

The USDA policy training includes the following:

- Micropurchase Policy
- Ethics
- Green Micropurchasing
- Section 508 Compliance.

The USDA micropurchase policy training will be available via U.S. Bank Access® Online. The other training links are provided on the Charge Card Service Center website at [http://www.da.usda.gov/procurement/ccsc/purchase\\_card.htm](http://www.da.usda.gov/procurement/ccsc/purchase_card.htm).

Mandatory Cardholder Training Memorandum

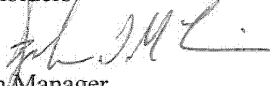


United States  
Department of  
Agriculture  
  
Office of the  
Assistant Secretary  
for Administration

Office of  
Procurement and  
Property  
Management

300 7<sup>th</sup> Street  
Southwest  
Room 302  
Reporters Building

Washington, DC  
20024-9300

TO: USDA Purchase Cardholders  
  
FROM: John T. McCain   
Departmental Program Manager  
USDA Charge Card Service Center NOV 3 2008

SUBJECT: Mandatory Cardholder Training

US Bank, USDA's new charge card provider, has begun mailing Purchase Cards to existing cardholders. Many of you have already received and activated these cards. (Please note that these US Bank-issued cards will not be operational until November 30, 2008). If you have not received your card by November 15, 2008, please contact your Local Agency Program Coordinator (LAPC). In preparation for using these cards, USDA requires that cardholders take specific on-line system and policy training, as outlined on the attached document.

Cardholders are required (by OMB Circular A-123, Appendix B) to complete purchase card training. There are two types of web-based training (WBT): system training and policy training. The policy training has been made available on US Bank's web site for your convenience. Because many USDA cardholders may also be approving officials (AOs) and/or LAPCs, there will clearly be some overlap in the required training. It is not necessary to retake the system training if you have already taken this training. However, there are some additional specific modules in USDA's WBT policy training that must be completed for certification. In addition to the required lessons, the WBT site provides numerous user guides and simulations relating to various aspects of Access® Online. Additional information on accessing the WBT is attached. After completion of training modules, please forward a copy of your training certificate with the name of your AO to your LAPC.

All training shall be completed by January 30, 2009, even though the new cards will be available for use by November 30, 2008. Cardholders who fail to complete the training by this date will have their accounts placed in an "inactive" status—i.e., any attempt to use the card will be declined at the point of sale.

For information (including Frequently Asked Questions) regarding the transition to the new US Bank, please refer to the Charge Card Service Center (CCSC) website ([www.usda.gov/procurement/ccsc](http://www.usda.gov/procurement/ccsc)). If your specific question is not addressed, you may e-mail the CCSC at [ccsc@da.usda.gov](mailto:ccsc@da.usda.gov).

Attachment:

AN EQUAL OPPORTUNITY EMPLOYER

## Mandatory Cardholder Training Memorandum (Continued)

**Web-based Training for Access® Online and USDA Policy**

Existing cardholders and approving officials (AOs) must be trained to use the purchase card and/or alternative payment methods. USDA, in partnership with US Bank, has developed web-based training (WBT) that must be taken for certification. The training is available at <https://wbt.access.usbank.com>. Once at this site, the first screen allows two log in options: Option 1--Lesson and Certification Login; Option 2--Lesson Only Login. For certification, Option 1 should be used and requires that the user register. A user who has more than one role in the USDA Charge Card Program—e.g., cardholder, AO, and Local Agency Program Coordinator (LAPC)—will need to register separately for each role. However, the same ID and personal password should be used for each registration. Registration also requires the user to enter an “Organization Short Name.” “USDA” is the short name to be used here and throughout Access® Online Registration also requires the user to enter an “Organization Short Name” and to choose a user type.” “USDA” is the short name to be used here and throughout Access® Online. For “Choose User Type”, select “**Government cardholder**”. A step-by-step screen print of each page for registration is also included for your use.

In addition to a personal password, logging in requires a WBT password. US Bank provides separate passwords for each role—cardholder, AO, and coordinator. Passwords expire every 60 days. Until December 3, 2008, use the password “**cascade**”. Future notification of passwords will be provided to you by your LAPC. If you do not receive the password, please contact your LAPC.

Once registration is complete, the user should return to the login screen and log in. (It is possible to access the training without this step, but the user may not see the USDA policy modules.) After the user enters their username, personal password, and WBT password, they must click "Go" to get in.

What the user sees on the screen is a suite of lessons that have been “suggested” by the bank. This is a generic set of lessons and is not focused on USDA. The USDA- required lessons are listed below; other lessons may be taken, but they are not required. All lessons do not have to be completed at one time, but to get credit for completing the required training the user must present a printed certificate showing that the examination for each of the required lessons has been passed.

**Required Cardholder Training**A. **Non-warranted cardholder**

Ethics\*

Green Purchasing\*

Section 508 (“*Micro-purchases and Section 508*”)\*

AbilityOne (under development)

Access Online\*

*(NOTE: Certification is required for each of these modules, including USDA Policy)*

**Mandatory Cardholder Training Memorandum (Continued)**

Online Registration  
Navigation Basics  
Account Profile  
Transaction Management  
Transaction Approval Process *(USDA's process, even though it says "DOT only." This will be fixed in the near future.)*  
My Personal Information  
*USDA Purchase Card Policy*

**B. Warranted cardholder**

**Access Online\***

*(NOTE: Certification is required for each of these modules, including USDA Policy)*

Online Registration  
Navigation Basics  
Account Profile  
Transaction Management  
Transaction Approval Process *(USDA's process, even though it says "DOT only." This will be fixed in the near future.)*  
My Personal Information  
*USDA Purchase Card Policy*

\*Certification required.

**Website for web-based training:** <https://wbt.access.usbank.com>

Links for other required training are available at  
[www.usda.gov/procurement/ccsc/purchase\\_card.htm](http://www.usda.gov/procurement/ccsc/purchase_card.htm)

**Technical Help:**

Access Online – 1-800-254-9885, option 2  
Cardholders/AOs – 1-888-994-6722

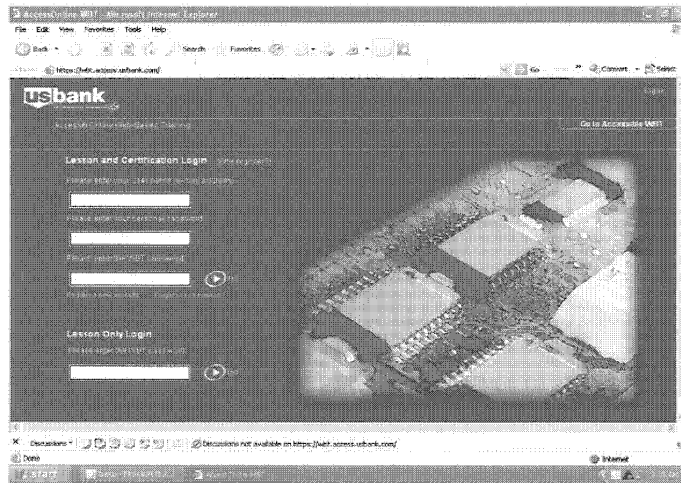
**Maintenance Credit Hours for Warranted Personnel**

Instructor-led training – 16 hours (12 for instructor-led + 4 for Access OnLine)  
Microsoft Office Live Meeting (MOLM) - 9 hours (5 for MOLM + 4 for Access Online)  
Access Online – 4 hours

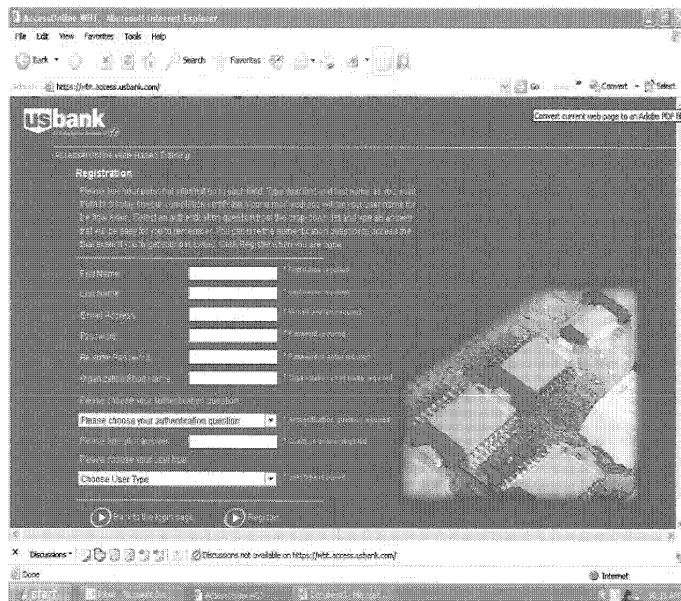
Mandatory Cardholder Training Memorandum (Continued)

Instructions for Registering in Access® Online

1. After accessing <https://wbt.access.usbank.com>: First Screen – Select “Register a new account”. This will bring you to the “Registration” screen.



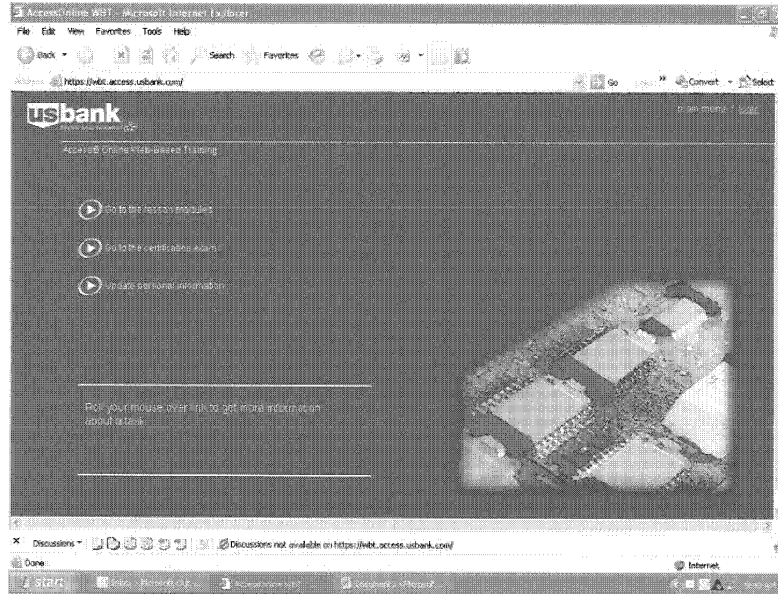
2. Registration – Enter personal information. At “Choose User Type”, select “Government cardholder”. Then click “register”. You will be brought to the Access Online Web-based Training Main Menu.



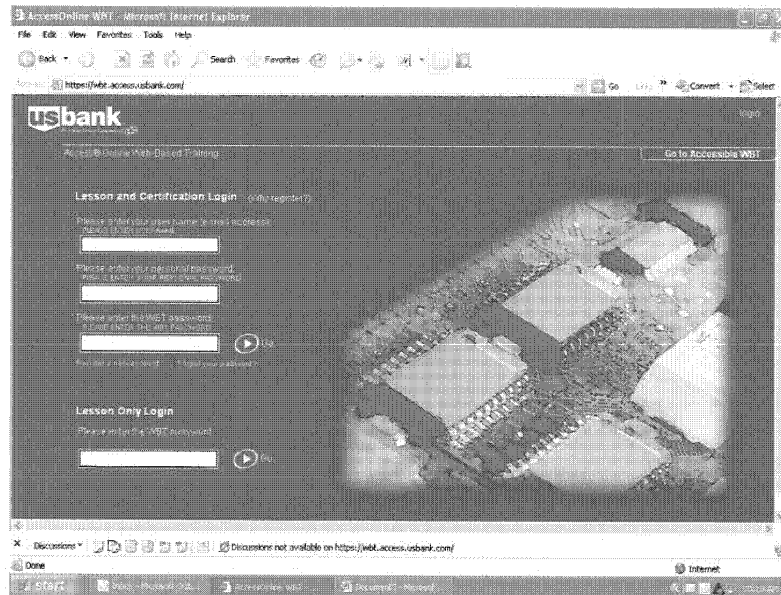


Mandatory Cardholder Training Memorandum (Continued)

3. Access Online Web-based Training main menu – Select “login” at the top of the screen. You will be brought to the “Lesson and Certification Login”.

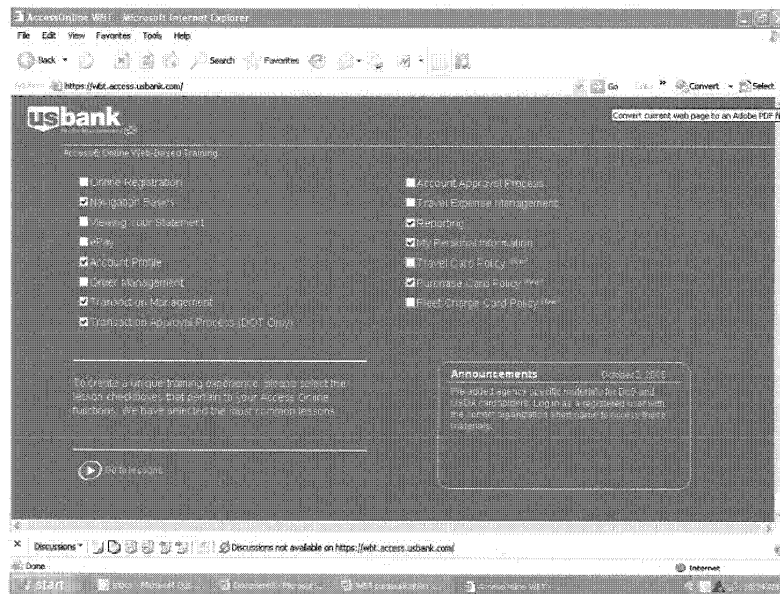
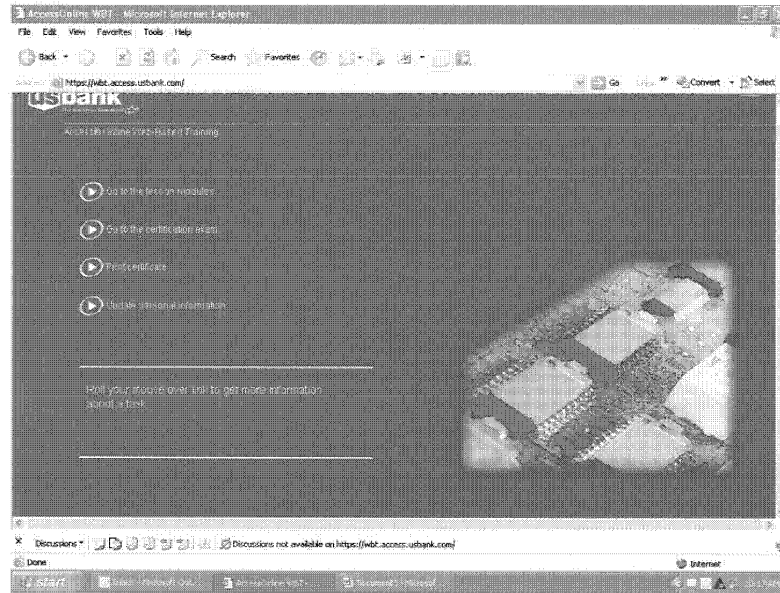


4. At the “Lesson and Certification Login” screen, enter information as prompted. For the WBT password, enter “casper”. Select go. You will be taken to the “Go to the lesson modules”.



Mandatory Cardholder Training Memorandum (Continued)

5. At this screen, select the required cardholder lessons from the previous page. Then select, go to lessons.



## Mandatory Approving Official Training Memorandum



United States  
Department of  
Agriculture  
  
Office of the  
Assistant Secretary  
for Administration

Office of  
Procurement and  
Property  
Management

300 7<sup>th</sup> Street  
Southwest  
Room 302  
Reporters Building

Washington, DC  
20024-9300

TO: USDA Purchase Card Approving Officials

FROM: John T. McCain  
Departmental Program Manager  
USDA Charge Card Service Center **NOV 3 2008**

SUBJECT: Mandatory Approving Official Training

US Bank, USDA's new charge card provider, has begun mailing Purchase Cards to existing cardholders. Many of your cardholders have already received and activated these cards. (Please note that these US Bank-issued cards will not be operational until November 30, 2008). In preparation for using these cards, USDA requires that cardholders and their Approving Officials (AOs) take specific on-line system and policy training. Training for AOs is outlined in the attached document. This training is not required for AOs who are current political appointees. However, if one of these AOs intends to review transactions in Access® Online before leaving office, the Access® Online training must be completed.

AOs are required (by OMB Circular A-123, Appendix B) to complete all the training that cardholders take. There are two types of web-based training (WBT): system training and policy training. The policy training has been made available on US Bank's web site for your convenience. Because many USDA AOs are also cardholders, there will clearly be some overlap in the required training. It is not necessary for AOs to retake the system training if they have already taken this training as cardholders. However, there are some additional specific modules in USDA's WBT policy training that must be completed for certification by each AO. After completion of training modules, please forward a copy of your training certificate with the names of the cardholders who are accountable to you to your Local Agency Program Coordinator.

All training shall be completed by January 30, 2009, even though the new cards will be available for use by November 30, 2008. AOs who fail to complete the training by this date will have the accounts for any of their cardholders placed in an "inactive" status—i.e., any attempt to use the card will be declined at the point of sale.

For information (including Frequently Asked Questions) regarding the transition to the new US Bank, please refer to the Charge Card Service Center (CCSC) website ([www.usda.gov/procurement/ccsc](http://www.usda.gov/procurement/ccsc)). If your specific question is not addressed, you may e-mail the CCSC at [ccsc@da.usda.gov](mailto:ccsc@da.usda.gov).

Attachment:

AN EQUAL OPPORTUNITY EMPLOYER

**Mandatory Approving Official Training Memorandum (Continued)****Web-based Training for Access® Online and USDA Policy**

Existing cardholders and approving officials (AOs) must be trained to use the purchase card and/or alternative payment methods. USDA, in partnership with US Bank, has developed web-based training (WBT) that must be taken for certification. The training is available at <https://wbt.access.usbank.com>. Once at this site, the first screen allows two log in options: Option 1--Lesson and Certification Login; Option 2--Lesson Only Login. For certification, Option 1 should be used and requires that the user register. A user who has more than one role in the USDA Charge Card Program—e.g., cardholder, AO, and Local Agency Program Coordinator (LAPC)—will need to register separately for each role. However, the same ID and personal password should be used for each registration. Registration also requires the user to enter an “Organization Short Name” and to choose a user type.” “USDA” is the short name to be used here and throughout Access® Online. For “Choose User Type”, select “**Government AO/BO**”. A step-by-step screen print of each page for registration is also attached for your use.

In addition to a personal password, logging in requires a WBT password. US Bank provides separate passwords for each role—cardholder, AO, and coordinator. Passwords expire every 60 days. Until December 3, 2008, use the password “**yellowstone**”. Future notification of passwords will be provided to you by your LAPC. If you do not receive the password, please contact your LAPC.

Once registration is complete, the user should return to the login screen and log in. (It is possible to access the training without this step, but the user may not see the USDA policy modules.) After the user enters their username, personal password, and WBT password, they must click "Go" to get in.

What the user sees on the screen is a suite of lessons that have been “suggested” by the bank. This is a generic set of lessons and is not focused on USDA. The USDA- required lessons are listed below; other lessons may be taken, but they are not required. All lessons do not have to be completed at one time, but to get credit for completing the required training the user must present a printed certificate showing that the examination for each of the required lessons has been passed.

**Required Approving Official Training**

- Ethics\*
- Green Purchasing\*
- Section 508 (“*Micro-purchases and Section 508*”)\*
- AbilityOne (under development)
- Access® Online\*

(NOTE: Certification is required for each of these modules, **including USDA Policy**)

- Navigation Basics
- Account Profile

**Mandatory Approving Official Training Memorandum (Continued)**

- Reporting
- Transaction Management
- Transaction Approval Process (*USDA's process, even though it says "DOT only." This is temporary and will be fixed.*)
- My Personal Information
- *USDA Purchase Card Policy*

\*Certification required.

**Website for web-based training:** <https://wbt.access.usbank.com>

Links for other required training are available at  
[www.usda.gov/procurement/ccsc/purchase\\_card.htm](http://www.usda.gov/procurement/ccsc/purchase_card.htm)

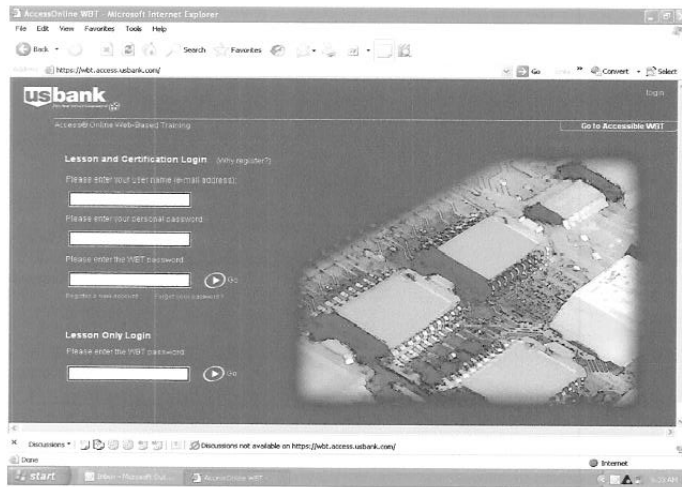
**Technical Help:**

Access® Online – 1-800-254-9885, option 2  
Cardholders/AOs – 1-888-994-6722

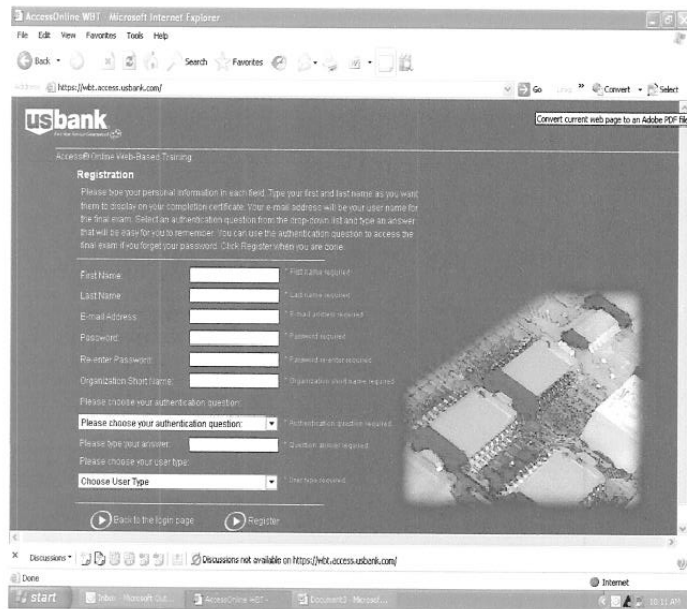
Mandatory Approving Official Training Memorandum (Continued)

Instructions for Registering in Access® Online

1. After accessing <https://wbt.access.usbank.com>: First Screen – Select “Register a new account”. This will bring you to the “Registration” screen.

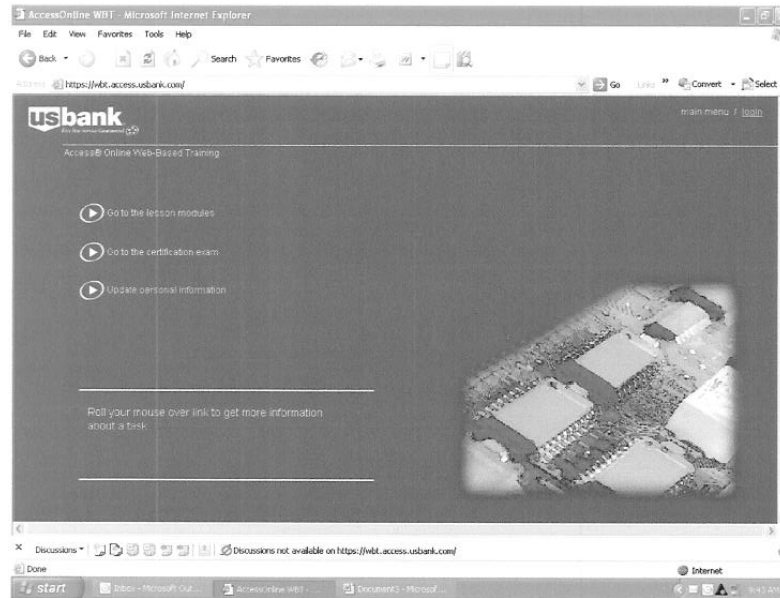


2. Registration – Enter personal information. At “Choose User Type”, select “Government AO/BO”. Then click “register”. You will be brought to the Access Online Web-based Training Main Menu.

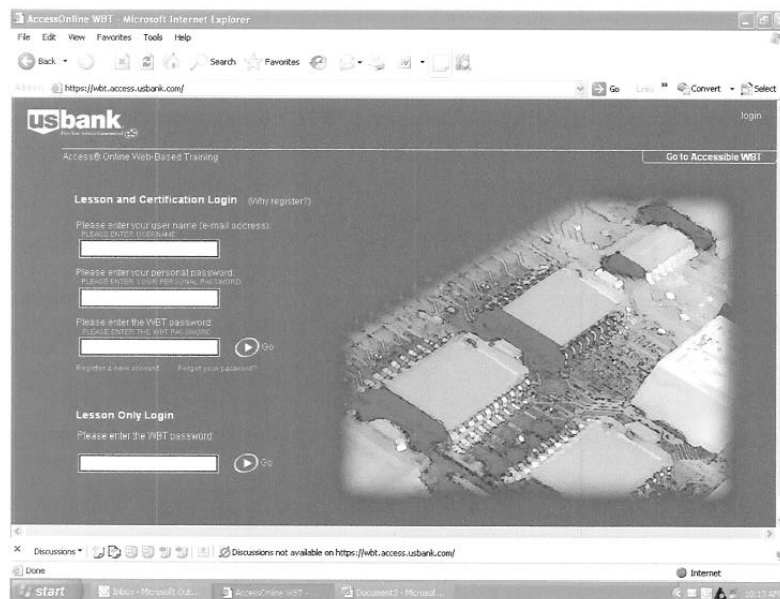


Mandatory Approving Official Training Memorandum (Continued)

3. Access Online Web-based Training main menu – Select “login” at the top of the screen. You will be brought to the “Lesson and Certification Login”.



4. At the “Lesson and Certification Login” screen, enter information as prompted. For the WBT password, enter “yellowstone”. Select go. You will be taken to the “Go to the lesson modules”.



Mandatory Approving Official Training Memorandum (Continued)

5. At this screen, select the required AO lessons from the list on the previous page. Then select, go to lessons.

