



USAID
FROM THE AMERICAN PEOPLE

**Functional Series [600](#)
Budget and Finance**

INTERIM UPDATE 07-16

SUBJECT: Introduction of New Mandatory Phoenix Accruals Web-Based Training for Obligation Managers, including Cognizant Technical Officers (CTOs)

NEW MATERIAL: This Notice has been corrected to include the course title, instructions on accessing the course through the Agency's Learning Management System (LMS), and a point of contact for technical questions. This Interim Update supersedes IU6_0715_092807_cd49.

EFFECTIVE DATE: September 29, 2007

This message was sent out 10/03/2007 as an Executive Message. This Notice is being posted to the Intranet for record purposes.

POLICY

USAID/General Notice
A/AID
10/03/2007

EXECUTIVE MESSAGE

This Notice has been corrected to include the course title, instructions on accessing the course through the Agency's Learning Management System (LMS), and a point of contact for technical questions.

Subject: Introduction of New Mandatory Phoenix Accruals Web-Based Training for Obligation Managers, including Cognizant Technical Officers (CTOs)

I am pleased to announce the availability of "Phoenix Accruals On-Line Training," a new, mandatory, web-based Accruals Training Module for obligation managers. All obligation managers, in particular CTOs responsible for calculating accruals, must take the course to improve their ability to meet this responsibility and promote consistency.

This course will ensure that obligation managers have the necessary training and support to effectively manage the accruals process. Managers and supervisors must ensure that all personnel with accruals responsibility complete the course within the established timeframe.

The 90-minute, web-based accruals training provides easily accessible, on-demand training through which all Agency employees, in particular those assigned accruals responsibilities, will acquire a significant level of knowledge on how to compute and record accruals. The course also makes available the same computer-based training for those individuals who require refresher training. Individuals must achieve a passing score in order to successfully complete this training.

Current obligation managers/CTOs must complete the training by December 14, 2007. Employees who fail to successfully complete the training by this date will not be authorized to carry out the responsibilities of obligation manager or CTO in Phoenix, NMS, or GLAS until the training is completed and a passing score is achieved.

Effective with the issuance of this Notice, a USAID employee that is not already an obligation manager/CTO must successfully complete this training before:

- 1) the employee may be assigned as an obligation manager in Phoenix;
- 2) the employee may have the CTO role in NMS or GLAS;
- 3) the employee may be assigned as a CTO by a Contracting Officer or Agreement Officer.

This requirement effectively means that the training is a prerequisite to being designated as a CTO and will become a mandatory requirement of the Agency's CTO certification program. M/OAA will revise the current Agency policy for designating a CTO, in ADS 302.3.7.1 for contracts, and ADS 303.3.17 for grants and cooperative agreements.

The new course is located at <https://university.usaid.gov/> in the Agency's Learning Management System (LMS). For detailed instructions on accessing the "Phoenix Accruals Online Training", please click here. For additional information, refer to ADS 631, Accrued Expenditures.

James R. Kunder
Acting Deputy Administrator

POINTS OF CONTACT: Questions regarding the Accruals Training Course content may be directed to Don Douglass, M/CFO/WFS, on (202)712-5227. Questions about CTO designation policy may be directed to Diane Howard, M/OAA/P, on (202) 712-0206. All technical questions about the course should be directed to Deirdre White, HR/TE, on (202)712-0475.

File Name	Notice Date	Effective Date	Editorial Revision Date	ADS CD No.	Remarks
IU6_0716_100307_cd49	10/03/2007	09/28/2007		ADS CD 49	This IU will remain active until it is incorporated into ADS 631.