USDA

United States Department of Agriculture

Office of the Assistant Secretary for Administration

Office of Procurement and Property Management

300 7th 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). If your specific question is not addressed, you may e-mail the CCSC at ccsc@da.usda.gov.

Attachment:

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. **After December 3, use the password "oriole"**. Michelle Bales, 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

- 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

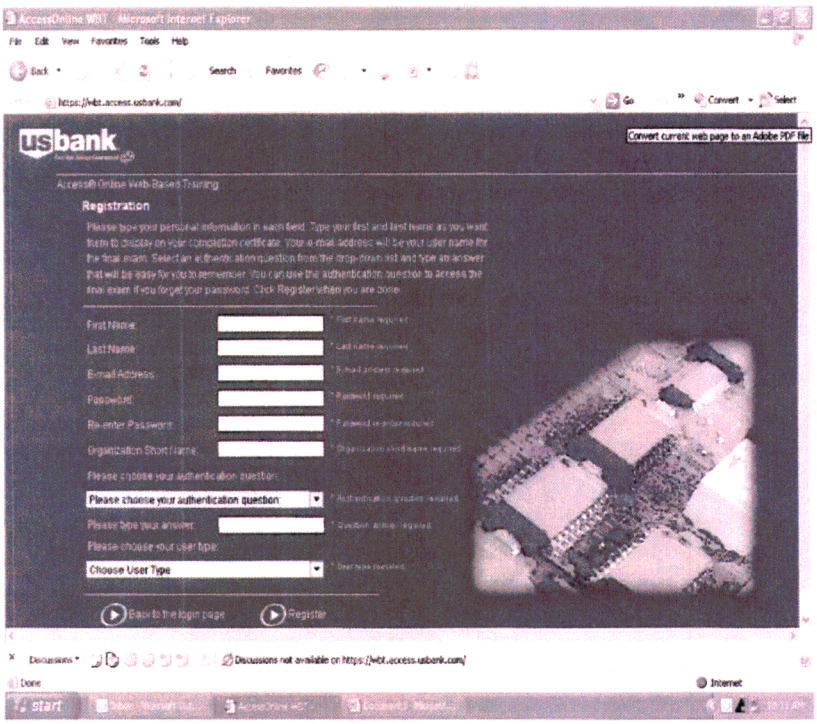
Technical Help:

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

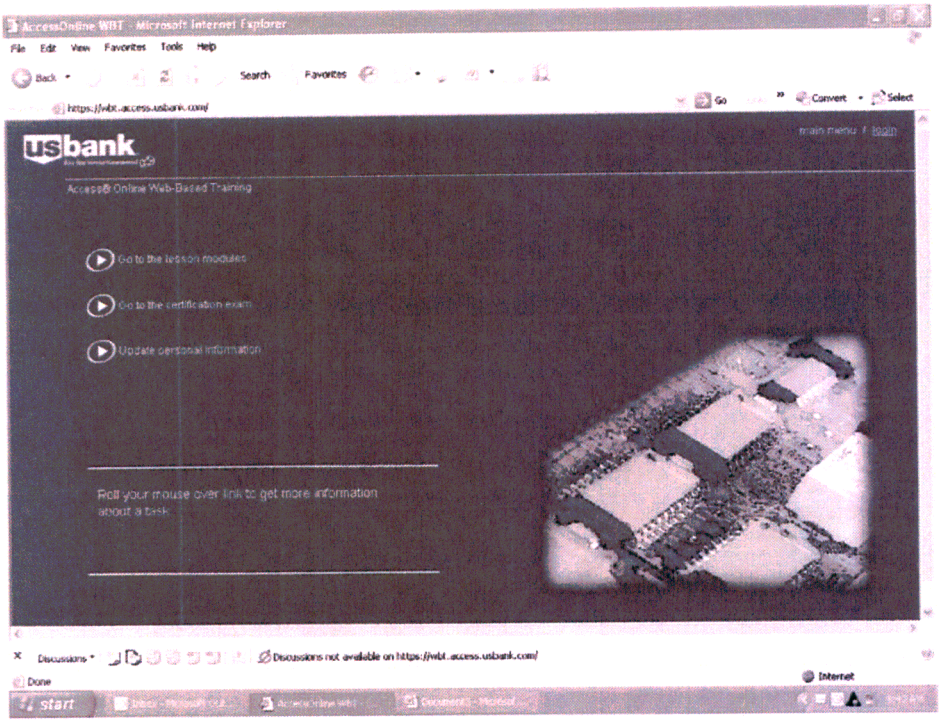
Instructions for Registering in Access® Online

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

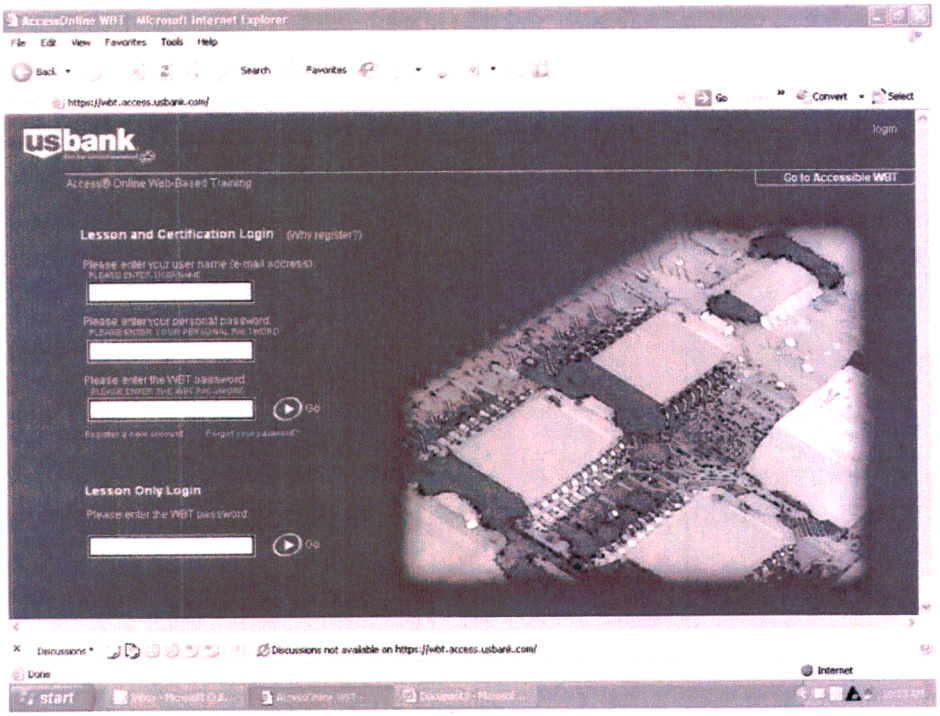
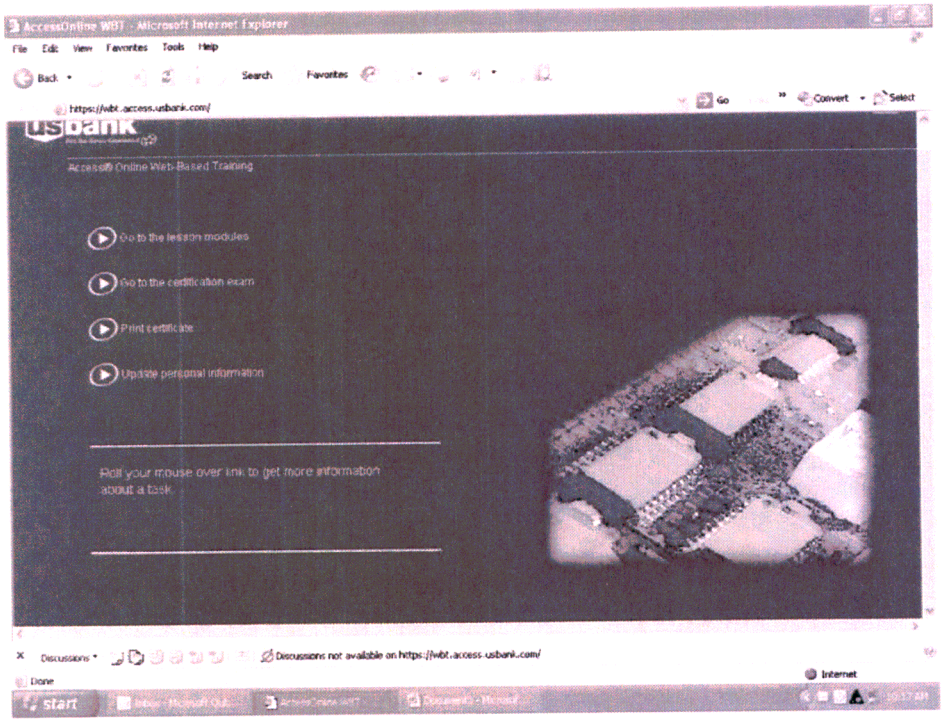
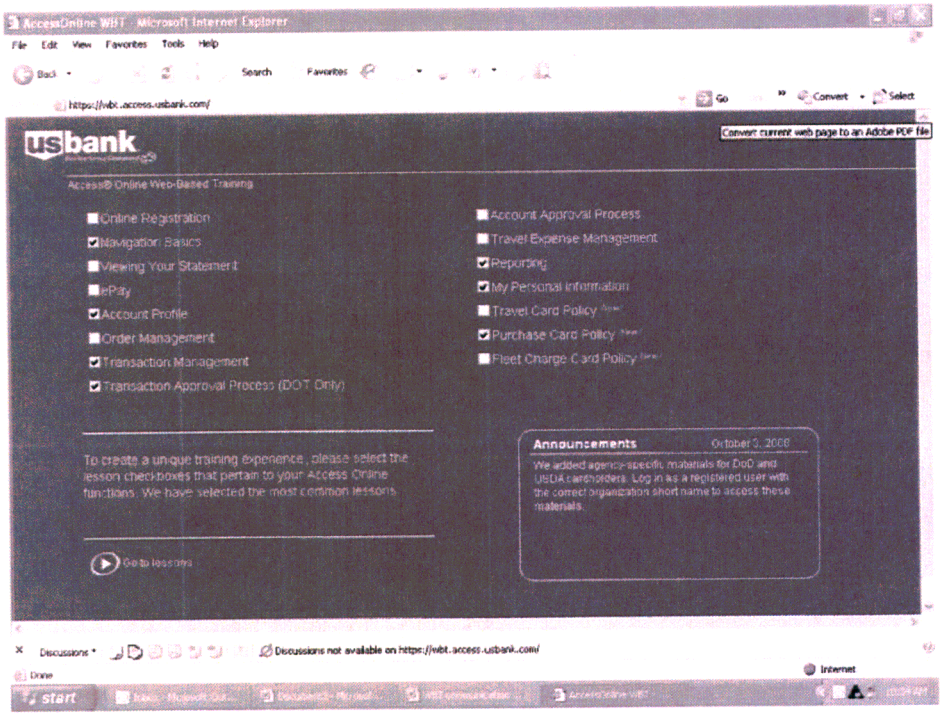
2. Registration – Enter personal information. At "Choose User Type", select "**Government AO/BO**". Then click "register". You will be brought to the Access Online Web-based Training Main Menu.



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".



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