



Requirements and Tracking for the USDA Purchase Card Annual Refresher Training

Agenda

- Requirements
- Timeline
- Tracking
- Frequently Asked Questions



Requirements

- **Agency Program Coordinators' (APCs) Required Action**
 - **Review [Procurement Advisory No. 125](#):** United States Department of Agriculture (USDA) Purchase Card Program – Mandatory, Annual Refresher Training Requirements.
 - **Educate** Coordinators, Approving Officials (AOs) and Cardholders immediately about the **Mandatory, Annual USDA Purchase Card Program Refresher Training Requirements and Fiscal Year 16 (FY16) timeline.**
 - **Ensure** Coordinators, AOs and Cardholders complete the Mandatory Annual Refresher Training by the **March 31st deadline.**



Requirements (cont'd.)

- All Coordinators, AOs and Cardholders **must complete the USDA Purchase Card Program Refresher Training** for their role(s) in **AgLearn** by **March 31, 2016**, and by **March 31st** for subsequent years. The modules in AgLearn are listed below.
 - Cardholders: USDA Purchase Card Program Refresher Training for Cardholders (*Web Based DM-PC-CARDHOLDERS-2015*)
 - Approving Officials: USDA Purchase Card Program Refresher Training for Approval Officials (*Web Based DM-APPROVING-OFFICIALS-2015*)
 - Coordinators (APCs and Local Agency Program Coordinators (LAPCs)): USDA Purchase Card Program Refresher Training for Coordinators (*Available in February 2016.*)



Timeline

■ FY16 Timeline

- **March 31, 2016:** Coordinators, AOs and Cardholders must complete the USDA Purchase Card Refresher Training in [AgLearn](#).
- **May 12, 2016:** Charge Card Service Center (CCSC) will suspend Purchase Card Accounts of Cardholders not meeting the March 31 deadline and will provide APCs with a list of their agency's non-complying Cardholders, AOs and Coordinators.
 - Note: APCs can activate Cardholders' suspended accounts upon Cardholders' submission of proof of successful completion.



Timeline (cont'd.)

■ FY16 Timeline (cont'd.)

- **June 3, 2016:** CCSC will provide USDA senior leadership and each agency's Head of Contracting Activities Designees (HCAD) with a list of agency's Coordinators and AOs still not complying with training requirements.
- **June 30, 2016:** Purchase Card Program participants who are still not in compliance by June 30 of each fiscal year will be required to successfully complete the entire complement of USDA Purchase Card Program training modules to continue participating in the Purchase Card Program.
 - **Note:** Refer to Sections 5.1 – 5.4 of the [Coordinator's Purchase Card Program Guide](#) for the training requirements.



Tracking

- **Assigning and Tracking Training in AgLearn**
 - CCSC will assign each Purchase Card Program participant with the applicable refresher training module and training due dates.
 - Applicable refresher training modules will be assigned in AgLearn to each Purchase Card Program participant based on their role.
 - An email will be sent to Purchase Card Program participants when the training is initially assigned in AgLearn.
 - Prior to the March 31 deadline, each APC will receive an email from the CCSC with a list of program participants who are required to complete the refresher training for the current fiscal year.
 - After the training deadline, each APC will receive an email from the CCSC with a list of program participants who have failed to meet the training requirement by the deadline.



Tracking (cont'd.)

- **Distribution of FY16 Refresher Training Compliance Report**
 - Every Other Week: February 1 – 26, 2016
 - Weekly: February 29, 2016, to March 25, 2016
 - Daily: March 28, 2016, to April 1, 2016
 - Weekly: April 4, 2016, to June 30, 2016



Frequently Asked Questions

- **AOs and Coordinators are also cardholders. Which refresher training course should they complete?**
 - Program participants who play dual roles (Cardholder and AO, LAPC or APC) are required to complete both the Cardholder refresher training and the course corresponding to their second program role. The corresponding courses are listed below.
 - Cardholders: USDA Purchase Card Program Refresher Training for Cardholders (*Web Based DM-PC-CARDHOLDERS-2015*)
 - Approving Officials: USDA Purchase Card Program Refresher Training for Approval Officials (*Web Based DM-APPROVING-OFFICIALS-2015*)
 - Coordinators (APCs and LAPCs): USDA Purchase Card Program Refresher Training for Coordinators (*Available in February 2016.*)



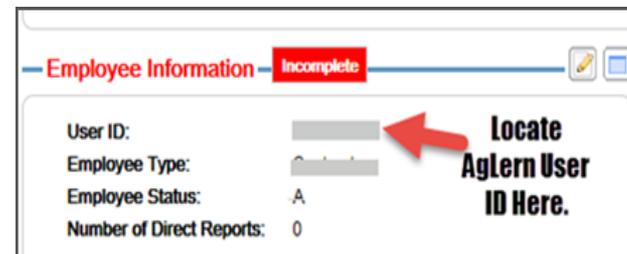
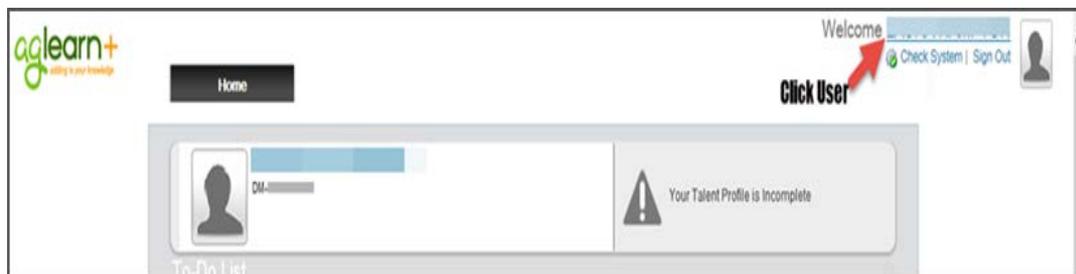
Frequently Asked Questions (cont'd.)

- **Will Continuous Learning Points (CLPs) be issued for completing these courses?**
 - Yes, two (2) CLPs are issued to warranted Coordinators when the following occurs.
 - Coordinator training is successfully completed by passing the final exam.
 - AgLearn issues the course completion certificate.



Frequently Asked Questions (cont'd.)

- Program participants have successfully completed the course and have a certificate of completion. The CCSC tracking report does not show the participants' status as complete. How do I change these participants' status to complete?
 - To change the status, please forward the information below to the CCSC.
 - Participant Full Name, Email Address and Role
 - Participant Certificate of Completion
 - Participant AgLearn User ID
 - AgLearn Homepage > Click User Name > Employee Information > User ID



Frequently Asked Questions (cont'd.)

- **An individual is identified as a program participant. However, the person is no longer with the purchase card program. How do I remove the person from the refresher training list?**
 - Cardholders
 - Obtain the Cardholder Destruction Form from the LAPC and T9 the Cardholder's account.
 - Send CCSC the Cardholder name and the last 4 digits of the account number. CCSC will remove the individual from the list upon confirmation of the account closure.
 - AOs and Coordinators
 - Maintain the individual's Access Online (AXOL) User ID by setting the status to 'Removed.'
 - Send the CCSC the individual's name and AXOL User ID. The CCSC will remove the individual from the list upon confirmation the User ID status has been changed.



Frequently Asked Questions (cont'd.)

- **Will waivers be granted to program participants so that they are not required to take the refresher training?**
 - No, all active program participants will be required to complete Refresher Training each fiscal year.



Frequently Asked Questions (cont'd.)

- If a Cardholder, AO or Coordinator completed the initial required Purchase Card training in FY16, then is the FY16 refresher training required?
 - No, the individual is not required to take the FY16 refresher training.
 - The individual has already received Purchase Card Program training for this fiscal year.
 - The individual's name will not appear on CCSC's list as a program participant who is required to take the FY16 refresher training.

