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Entering Purchase Card Account Requests in Access Online

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Training Topics

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2. Accessing Reference Materials
3. Understanding the Entire Process
4. Defining Roles & Responsibilities
5. Understanding Request Coordinator Role & Expectations
6. Examining Purchase Card Account Request Before Entering in Access Online
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13. Reviewing Entered Account Information
14. Submitting for Final Approval
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16. Correcting Rejected Purchase Card Account Requests



Acronym List

Acronym	Meaning
AO	Approving Official
APC	Agency Program Request Coordinator
AXOL	Access Online
CCSC	Charge Card Service Center
COOP	Continuity of Operations
FEG	Functional Entitlement Group
LAPC	Local Agency Program Request Coordinator



Understanding the Purpose of Each Training

The ***How to Complete the Purchase Card Request Form*** training and the ***Entering Purchase Card Account Requests in Access Online*** training provide the instructions for an Agency Program Request Coordinator (APC) or a Local Agency Program Request Coordinator (LAPC) as a Request Coordinator to submit a Purchase Card Account Setup in Access Online (AXOL).

The ***Final Approving Purchase Card Account Request in Access Online*** training provides instructions for an APC as the Final Approver to review and approve the submitted card via Purchase Card Account Setup in Access Online (AXOL).



Understanding the Purpose of Each Training

- The trainings are mandatory to participate as a Request Coordinator or Final Approver to process a Purchase Card Account Request in Access Online.
- The table below outlines the required training for each role.

Training	Request Coordinator	Final Approver
<i>Entering Purchase Card Account Requests in Access Online</i>	✓	✓
<i>How to Complete the Purchase Card Request Forms</i>	✓	✓
<i>Final Approving Purchase Card Account Request in Access Online</i>		✓



Accessing Reference Materials

Entering and Final Approving Purchase Card Account Requests in Access Online Guide

- CCSC strongly encourages everyone to download from the CCSC website the guide [Entering and Final Approving Purchase Card Account Requests in Access Online](#).
- This training focuses on Sections 4, 5 and 6 of the guide.
- CCSC strongly encourages everyone to refer to the guide during this training and when entering purchase card account requests.
- The CCSC website is located at https://www.dm.usda.gov/procurement/ccsc/purchase_card.htm.

Entering and Final Approving Purchase Card Account Requests in Access Online

USDA Purchase Card Program



USDA OPPM Charge Card Service Center

Originated: 09/21/2015
Updated: 03/28/2017
Version: 2.0



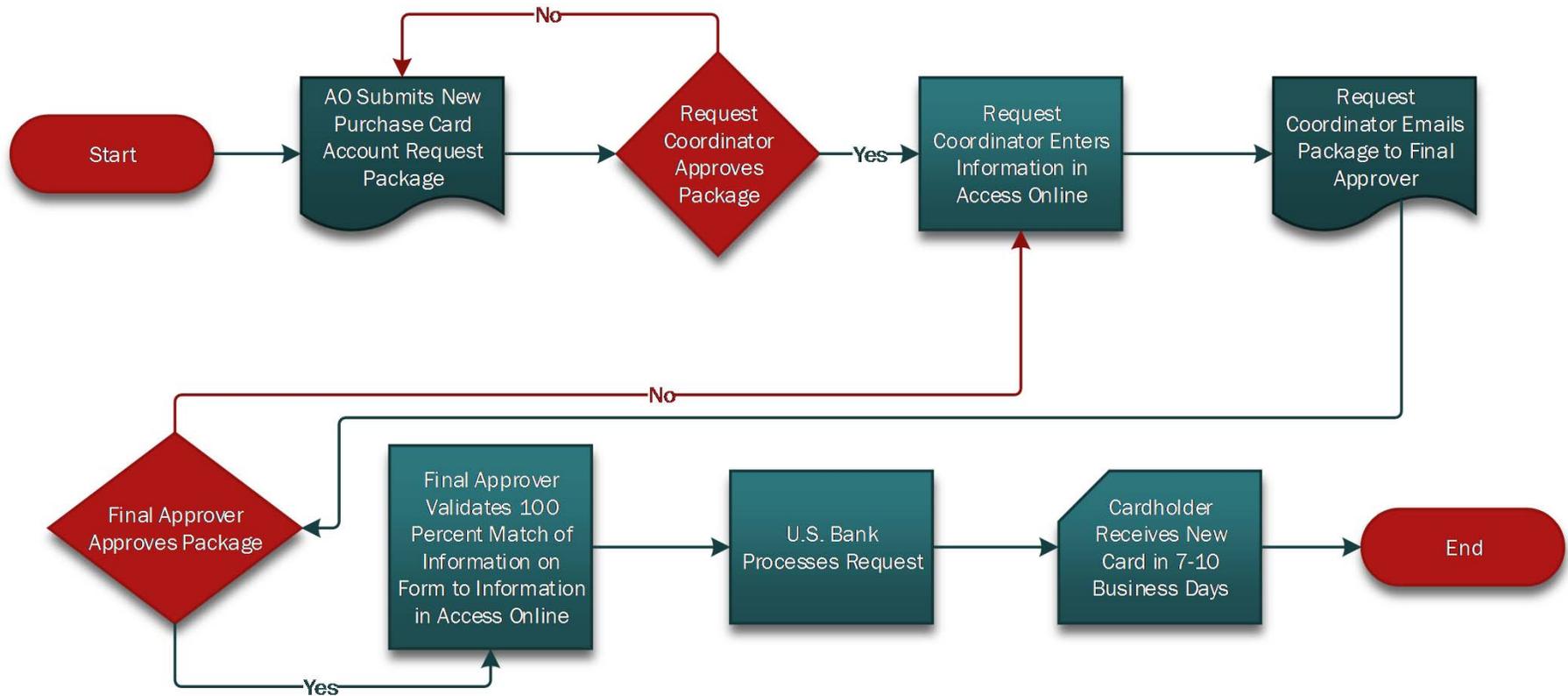
Understanding the Entire Process

Following Each Step: from Entering through Final Approving of a Purchase Card Account Request

- Purchase Card Account Requests—from creation to approval—are handled through U.S. Bank's AXOL.
- LAPCs who serve as a Request Coordinator may enter Purchase Card Account Requests into AXOL. APCs may final approve the requests.
 - Reminder: Not all LAPCs have the permissions in AXOL to serve as a Request Coordinator.
- Upon the APC's approval, U.S. Bank creates and issues the Purchase Card.
- CCSC provides monitoring and oversight for the Purchase Card Account Request.
- The process flow on the next slide outlines the steps and roles for entering and final approving a Purchase Card Account Request in AXOL.



Understanding the Entire Process



Understanding the Entire Process

Obtaining AXOL Permissions

- An APC submits to the CCSC the request, along with proof of training, for an LAPC to serve as a Request Coordinator.
- CCSC grants LAPCs the AXOL permissions to serve as a Request Coordinator.
- The Request Coordinator enters a Purchase Card Account Request in AXOL after receiving a Purchase Card Account Request and proof of training from an Approving Official (AO).
- Section 3.2 of [*Entering and Final Approving Purchase Card Account Requests in Access Online*](#) details the formal process for seeking Request Coordinator permissions.



Defining Roles & Responsibilities

Examining Four Roles that Work Together

- The table below outlines the responsibilities of each role involved in processing Purchase Card Account Requests.

Responsibility	Request Coordinator	Final Approver	CCSC	U.S. Bank
Completes CCSC-provided training on reviewing and entering Purchase Card Account Requests.	✓	✓		
Completes CCSC-provided training on final approving Purchase Card Account Request.		✓		
Reviews card requests for accuracy; before entering, rejects all Purchase Card Account Requests with errors.	✓			
Enters error-free card requests in AXOL and, via AXOL, submits to the Final Approver for approval.	✓			
Reviews Request Coordinator-entered Purchase Card Account Requests and approves or rejects requests as needed.		✓		
Provides Request Coordinator with rejection explanations.		✓		
Corrects rejected requests in AXOL and, if needed, on the form.	✓			



Defining Roles & Responsibilities

Responsibility	Request Coordinator	Final Approver	CCSC	U.S. Bank
Answers questions from APCs and LAPCs.		✓		
Checks card status in AXOL.	✓	✓		
Emails the Final Approver with Purchase Card Account Request Package.	✓			
Retains emailed Purchase Card Account Request Packages.		✓		
Provides training to Request Coordinators and Final Approvers.			✓	
Works with APCs to prevent purchase card-related errors.			✓	
Issues cards for all approved card requests in AXOL.				✓



Understanding Request Coordinator Role & Expectations

Exploring Request Coordinator Role Details

- The Request Coordinator is the first line of defense for ensuring the submission of a high-quality Purchase Card Account Request Package.
- The Request Coordinator enters only those submissions fully meeting the requirements in Chapters 4, 5 and 6 of the guide, [Entering and Final Approving Purchase Card Account Requests in Access Online](#).
- The Request Coordinator confirms that the Purchase Card Account Request Package adheres to the requirements below.
 - The package contains a valid warrant when the single purchase limit exceeds the micro purchase limit.
 - All required fields on the form are completed; signatures are within 60 days of the submission date.
 - The Cardholder's name, USDA mailing address and USDA email address are accurate.
 - All information on the Purchase Card Request Form and the information in AXOL match 100 percent.



Examining Purchase Card Account Request Before Entering in Access Online

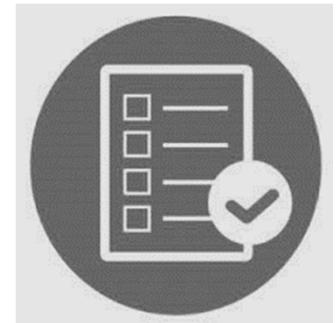
Reviewing the Purchase Card Package

- The Request Coordinator reviews the Purchase Card Package for completeness before entering any information into Access Online.
- The Request Coordinator checks, at the minimum, for the following:
 - The most recent version of [the form](#) is used.
 - Completed [CCSC Purchase Card Request Form](#) is included.
 - All signatures on the form are dated within 60 days of the submission date.
 - Training Certificates per the [CCSC Purchase Card Program Guide](#) are included.
 - Warrant Certificate (if needed) is included.
 - The name (First, MI, Last), the phone and the email of the future Cardholder matches the information in the Global Address List in MS Outlook.
 - The mailing address is verified using USPS' [Look Up a ZIP Code™](#).
 - Future Cardholder is not an existing AO or Cardholder in the same hierarchy as the requested card.



Examining Purchase Card Account Request Before Entering in Access Online

- When the Request Coordinator confirms the 100 percent compliance of the Purchase Card Package, then only he or she enters the information into AXOL.
- When the Request Coordinator encounters one or more errors or omissions with the Purchase Card Package, then he or she returns the Purchase Card Package to the AO for correction and resubmission.
- Each month CCSC reviews all entered requests, notifies each APC of any incorrectly entered requests, and uses the review's results to determine the Agency of the Quarter.
- The next slides outline the steps to confirm a future Cardholder is not an existing Approving Official or existing Cardholder in the same hierarchy as the new Purchase Card.



Examining Purchase Card Account Request Before Entering in Access Online

Confirming an AO's Assignment to a Different Hierarchy

- In AXOL, the Request Coordinator searches for the future cardholder under **System Administration → User Profiles**. (See 1.)
- If the future Cardholder's Functional Entitlement Group (FEG) is **PAGC_AO4**, then the Request Coordinator verifies that the processing hierarchy for the FEG and Purchase Card Account Request do not match. (See 2.)
- If the processing hierarchy for the FEG and card request do match, then the Request Coordinator does not enter the request; promptly returns the request to the AO; and discusses the conflict's resolution with the AO.



usbank Access Online

Request Status Queue
Active Work Queue

System Administration

System Administration
• User Profiles
Account Administration
Transaction Management
Account Information
Reporting

System Administration

[User Profiles](#)
Create or modify existing user ID/login information and establish account and hierarchy access.



User Last Name: User First Name:

OR

Account Number:

OR

Select a user to view their profile summary.

Records 1 - 25 of 54
Page: 1 | 2 | 3

User Name	User ID	Telephone	Creation Date	Functional Entitlement Group
			12/17/2008	CH_USDA
			11/10/2008	PAGC_AO4
			03/12/2009	CH_USDA



Examining Purchase Card Account Request Before Entering in Access Online

Confirming Cardholder Not Already Existing in the Same Agency (Level 3)

- In AXOL, the Request Coordinator searches for the future cardholder under **Account Information**. (See 1.)
- The Request Coordinator searches for the future cardholder by using the **Last Name** field. (See 2.)
- If the future Cardholder appears in the search results, the Request Coordinator reviews the details, especially Level 3. (See 3.)
- If the Level 3 in AXOL matches the future Cardholder, the Request Coordinator does not enter the request; promptly returns the request to the AO; and discusses the conflict's resolution with the AO.

Request Status Queue
Active Work Queue
System Administration
Account Administration
Transaction Management
Account Information
Statement
Account Profile
Reporting
Dashboard
Data Exchange
My Personal Information

Account Information

Statement
View account statement(s).

- Cardholder Account Statement
- Managing Account Statement
- Diversion Account Statement

Account Profile
View account demographics, limits, accounting code, and other related information.

- **Cardholder Account Profile**
- Managing Account Profile
- Diversion Account Profile

usbank Access Online Log Out

Request Status Queue
Active Work Queue
System Administration
Account Administration
Transaction Management
Account Information
Statement
Account Profile
Reporting
Dashboard
Data Exchange
My Personal Information

Cardholder Account Profile
Search & Select an Account

View Diversion Account | View Managing Account

Cardholder Account Search
Search for an account by Cardholder Account Number, Name, or Social Security Number. You can also find a cardholder account by first searching for a Managing Account.

Account Number:
Last Name (or Vehicle Name): First Name:
OR: Social Security Number:
OR:

Search

Find Account

Use the filters to search for a specific account

Cardholder Account Number
Last Name
Cardholder Account ID
Cardholder Account Name
with

Search Clear All

Results

Cardholder Account ID	Account Status	Account Name	Product
XXXXXXXXXX	VS-Voluntary Closed	XXXXXXXXXX SMITH	Product Purchasing
XXXXXXXXXX	Open	XXXXXXXXXX SMITH	Product Purchasing



Entering Purchase Card Account Request in Access Online

Entering the Request

- The Request Coordinator logs into [Access Online](#) using his or her User ID and password.
 - URL = <https://access.usbank.com>
 - Organization Short Name = USDA
- The Request Coordinator selects **Account Administration** from the left navigation and then **Create New Cardholder Account**.
- **Define Product Settings** automatically appears.

Welcome to Access Online!

Please enter the information below and login to begin.

Organization Short Name:

User ID:

Password:

[Login](#)

[Forgot your password?](#)

[Register Online](#)

usbank Access[®] Online

Request Status Queue
Active Work Queue
System Administration
Account Administration
• Cardholder Accounts
• Managing Accounts
Transaction Management

Account Administration

Cardholder Accounts

Create New Cardholder Account
Set up a new cardholder account by specifying



Defining Product Settings

- Using the information on the completed Purchase Card Request Form, the Request Coordinator enters all information. (See the instructions in the table below.)
- Once finished, the Request Coordinator clicks **Next**.

Field	Instruction
Product (Bank)	Always Purchasing-3059
Agent	Same as the card's Level 4 (required)
Company	Same as the card's Level 5 (required)
Division	Same as the card's Level 6 (required)
Department	Same as the card's Level 7 (not all agencies use)
Physical Card (not shown)	Always Yes



Entering Account Owner's Information

2. Enter Account Information

Account Owner's Information Editable

Required Fields (unless noted as optional)

First Name i **MI (optional)** **Last Name** i Matches USDA's HR Department.

Mailing Address i Verify address with USPS; cannot be a home address.

Country
United States

Address Line 1

Address Line 2 (optional)

City **State** **ZIP Code**

Select

Work Phone

Email Address Confirm valid USDA email address. Enter training & warrant certification; entry date; & submitter's initials.

Account Owner's Information Comments (optional)

I certify that the cardholder has completed the required training and, upon request, can provide the training certificates and warrants.
11/11/11 RZ

Show Optional Fields

- The Request Coordinator uses the information on the Purchase Card Request Form to complete this section.
- *Remember.* The **MI** (middle initial) is required.
- The Request Coordinator completes all yellow-highlighted fields, including the certification, dates and initials in **Account Owner's Information Comments**.
- Click **Show Optional Fields** to enter more required information.



Entering Account Owner's Information

Hide Optional Fields

Enter FOREIGN NATL N or FOREIGN NATL Y.

Social Security Number

Date of Birth

Optional 1

Third Line Embossing

Personal Phone

Additional Phone

Fax Number

Identification Number

Tax Exempt Number

- Using the information on the completed Purchase Card Request Form, the Request Coordinator enters all information. (See the instructions in the table below.)

Field	Instruction
Optional 1	Enter FOREIGN NATL N or FOREIGN NATL Y .
Third Line Embossing	Obtain from the agency's APC (e.g., USDA FS, USDA RD).



Entering Account Details

Account Details Editable

Required Fields (unless noted as optional)

Cycle Day ⓘ Expiration Date
7

Send Checks? ⓘ
No

Maximum Dollar Per Check (optional) ⓘ Days Check Remains Valid (optional) ⓘ

Account Details Comments (optional)

Show Optional Fields Add only if COOP card.

- Using the information on the completed Purchase Card Request Form, the Request Coordinator enters all information. (See the instructions in the table below.)

Field	Instruction
Send Checks?	Select Yes or No per the Purchase Card Request Form.
Account Details Comments (optional)	Enter COOP <u>only</u> when the card is used for Continuity of Operations (COOP).



Entering Account Details

Hide Optional Fields Automatically populated with previously-entered Processing Hierarchy.

Reporting Level ⓘ

Level 1 Level 2 Level 3

Level 4 Level 5 **Level 6**

Level 7

🔍 Search

Use only at APC's direction.

Specify Valid Account Active Dates ⓘ ⓘ

Start Date End Date

Organization Name

- Using the information on the completed Purchase Card Request Form, the Request Coordinator enters all information. (See the instructions in the table below.)

Field	Instruction
Levels 1-7	Confirm the levels in AXOL match the levels on the Purchase Card Request Form.
Organization Name	Enter the name on the Purchase Card Request Form. If unsure, check with the agency's APC.



Entering Default Accounting Code

➔ Default Accounting Code
Editable

Required Fields (unless noted as optional)

Default Accounting Code ⓘ

LINE OF ACCOUNTING (61) (optional)

BOC (4) (optional)

DCN (FAS USE ONLY) (6) (optional)

Default Accounting Code Comments (optional)

- Using the information on the completed Purchase Card Request Form, the Request Coordinator enters all information. (See the instructions in the table below.)

Field	Instruction
Line of Accounting	Confirm the Line of Accounting in AXOL matches the Line of Accounting on the Purchase Card Request Form. Use the search feature if necessary. See Section 5.3.3 of the Guide for more details.
BOC	2670



Entering Authorization Limits

The screenshot shows the 'Authorization Limits' form with the following fields and instructions:

- Account Credit Limit:** A red arrow points to this field with the instruction: "Same as monthly office limit."
- Single Purchase Limit:** A red arrow points to this field with the instruction: "If > \$3,500 submit warrant certificate."
- Cash Withdrawal Limit (%):** A red arrow points to this field with the instruction: "No Convenience Check = 0, Yes Convenience Check = 20"
- Authorization Limit Comments (optional):** A red arrow points to the text "12345" in the comment box with the instruction: "Add warrant number if have warrant certificate."
- Hide Optional Fields:** A red arrow points to this link with the instruction: "Add warrant number if have warrant certificate."

Other form elements include: "Required Fields (unless noted as optional)", "Additional Credit Limits", "First Fiscal Month: October", and a table for "Merchant Authorization Control (MAC) : Existing Controls".

- Using the information on the completed Purchase Card Request Form, the Request Coordinator enters all information. *(See the instructions in the table below.)*
- Skip **Show Optional Fields**; no required information in the section.
- Click **Next** to continue.

Field	Instruction
Account Credit Limit Single Purchase Limit Authorization Limit Comments	Confirm the limits in AXOL match the limits on the Purchase Card Request Form. For a single purchase limit greater than the micro purchase limit, include warrant information in the comments.
Cash Withdrawal Limit (%)	No Convenience Check = 0 Yes Convenience Check = 20



Reviewing Entered Account Information

2. Enter Account Information

Account Owner's Information Edit

 Our post office software has updated the address entered. Please review the address before continuing.

Required Fields (unless noted as optional)

First Name 

MI (optional)

Last Name 

Mailing Address 

Country

United States 

- The system automatically reviews the entered information and adds the last four digits to the entered five-digit zip code.
- The Request Coordinator compares the information on the screen to the information on the Purchase Card Request Form and makes any needed corrections.
- When all information is correct, the Request Coordinator clicks **Next**.



Reviewing Entered Account Information

The screenshot shows the 'Create New Account' process in the US Bank Access Online system, specifically the '3. Review Information' step. The form is organized into several sections:

- Define Product Settings:** Includes fields for Product (Purchasing), Processing Hierarchy, Managing Account, Managing Account ID, Managing Account Name, and Physical Card (Yes).
- Enter Account Information:** Contains fields for Account Owner's Information (First Name, MI, Last Name, Mailing Address, Work Phone, Email, Social Security Number, Date of Birth, Optional 1, Third Line Embossing, Personal Phone, Additional Phone, Fax Number, Identification Number, Tax Exempt Number, and Account Owner's Information Comments).
- Account Details:** Includes Cycle Day, Expiration Date, Send Checks?, Maximum Dollar Per Check, Days Check Remains Valid, Reporting Level (Levels 1-7), Specify Valid Account Active Dates (Temporary Authorization Start/End Date), Organization Name, and Account Details Comments.
- Default Accounting Code:** Includes LINE OF ACCOUNTING (61), DCN (FAS USE ONLY) (6), BOC (4), and Default Accounting Code Comments.
- Authorization Limits:** Includes Account Credit Limit, Additional Credit Limits (Single Purchase Limit), Cash Withdrawal Limit (%), Velocity Limit, First Fiscal Month, and Authorization Limit Comments.

At the bottom of the form are 'Cancel', 'Save', and 'Submit' buttons. The footer includes the US Bank logo, Privacy Policy, Contact Us, and copyright information: © 2017 U.S. Bank National Association. R01735880 - 04-10-2017 15:23:20 CDT.

- The Request Coordinator reviews the entire submission to locate and address missing or omitted information.
- When reviewing the submission, the Request Coordinator is mindful of these common issues.
 - Missing Middle Initial
 - Missing Optional 1
 - Missing Third Line Embossing
 - Missing Level 6 and Level 7
 - Missing Organization Name
 - Incorrect Cash Withdrawal %
- The Request Coordinator clicks **Submit** only when the **information** in AXOL and on the form **matches 100 percent**.



Submitting for Final Approval

Obtaining Final Approval for Purchase Card Account Request

- The Request Coordinator emails the agency's Final Approver that the card is ready for review.
 - **Note:** The bank does not notify users of items pending; therefore an email is needed.
- The Request Coordinator's email must contain the following:
 - All training certificates and, if required, a warrant certificate; and
 - A subject line stating, **Final Approval – New Purchase Card Request for [Last Name of Cardholder]** (e.g., Final Approval – New Purchase Card Request for Smith).
- The Request Coordinator cannot modify the information after submitting a Purchase Card Account Request in AXOL. The Final Reviewer must reject the card submission in order for the Request Coordinator to modify the request.
- The Final Reviewer informs the Request Coordinator about the submission's approval status.
 - Upon the request's approval in AXOL, the purchase card production is three days followed by delivery to the Cardholder in another seven to ten days.



Checking Submission's Status

Request Status Queue	Request Status Queue Account Requests							
Request Status Queue Active Work Queue System Administration Account Administration Transaction Management Account Information Reporting Dashboard Data Exchange My Personal Information	Setup Cardholder Account Maintain Cardholder Account Maintain Managing Account Select a request to view the details. Records 26 - 50 of 2391 Page: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 >> last							
Home	Refresh L							
Contact Us	Delete Request	Request Status (View Details)	Account Number	Request Type	Start Date	Account Name	Last Update	Update Method
Training	<input type="checkbox"/>	Maint CH Account Complete		CARDHOLDER MAINTENANCE	04/20 07:59		04/20 07:59	Online
Government Services	<input type="checkbox"/>	Setup CH Acct Complete		CARDHOLDER INITIATED SETUP	04/19 18:53		04/19 19:23	Online
	<input type="checkbox"/>	Maint CH Account Complete		CARDHOLDER MAINTENANCE	04/19 18:48		04/19 18:48	Online
	<input type="checkbox"/>	Setup CH Acct Complete		CARDHOLDER INITIATED SETUP	04/19 18:20		04/19 18:42	Online
	<input type="checkbox"/>	Maint CH Account Complete		CARDHOLDER MAINTENANCE	04/19 18:11		04/19 18:11	Online
	<input type="checkbox"/>	Pending - Hierarchy Change		CARDHOLDER HIERARCHY CHANGE	04/19 18:05		04/19 18:05	Online
	<input type="checkbox"/>	Final Review - CH Setup		CARDHOLDER SETUP	04/19 17:24		04/19 17:33	Online

Tracking Progress of the Purchase Card Request

- The Request Coordinator clicks the **Request Status Queue** from the left-side navigation in AXOL.
- The Request Coordinator locates the submission from the list and clicks the submission for details.

*Remember: If a purchase card account request is not final approved in AXOL within **30 days** of submission, AXOL purges the request.*



Checking Submission's Status

- The account request details appear.
- The Request History lists the submission steps, as well as indicates the request's progress in the submission process.
- For example, the card is listed "Ready" (waiting) for a Final Review under the **Task Status** column.

Request Status Queue
Account Request Details

Setup Cardholder Account | Maintain Cardholder Account
Maintain Managing Account

Request Detail
 ID: pvm:0a12nbau
 Status: Final Review - CH Setup
 Request Type: CARDHOLDER SETUP
 Product: Purchasing
 Account Number:
 Reason:
 Account Name: [REDACTED]
 Start Date: 04/19 17:24
 Requestor: [REDACTED]
 Acquired By:
 File ID:
 Update Method: Online

Bank	Agent	Company	Division	Department
3059	0587	[REDACTED]	[REDACTED]	[REDACTED]

Request History

Request Status	Task Status	Ready Date	Last Updated	User
Data Entry - Product Settings	DONE	04/19 17:24	04/19 17:25	[REDACTED]
Data Entry - Acct Owner Details	DONE	04/19 17:25	04/19 17:33	[REDACTED]
Data Entry - Acct Details	DONE	04/19 17:25	04/19 17:33	[REDACTED]
Data Entry - Default Acct Code	DONE	04/19 17:25	04/19 17:33	[REDACTED]
Data Entry - Auth Limits	DONE	04/19 17:25	04/19 17:33	[REDACTED]
Final Review - CH Setup	READY	04/19 17:33		[REDACTED]



Correcting Rejected Purchase Card Account Requests

Preventing and Handling Rejected Requests

- Section 6 of the [Entering and Final Approving Purchase Card Account Requests in Access Online Guide](#) provides more details on handling corrections.
 - APCs are an excellent resource for Request Coordinators correcting rejected requests.
- The Final Reviewer emails the Request Coordinator about a rejected request, including the rejection reasons.
- The Request Coordinator carefully reads the rejection reasons, which may result from
 - Incorrect or missing information on the Purchase Card Request Form; or
 - Inaccurate or missing information in Access Online.
- If the rejection is due to errors on the form, then the Request Coordinator does the following:
 - Corrects the form;
 - Resubmits the request in Access Online; and
 - Emails the Final Reviewer the corrected request package.



Correcting Rejected Purchase Card Account Requests

- Upon receipt of the Final Approver's notification, the Request Coordinator logs into Access Online to correct and to resubmit a request.
- The Request Coordinator selects **Active Work Queue** from the left-side navigation.
- The Request Coordinator locates the card in question from the results and double clicks the card to begin corrections.

*Remember: If a purchase card account request is not final approved in AXOL within **30 days** of submission, AXOL purges the request.*

Request Status Queue
Active Work Queue
System Administration
Account Administration
Transaction Management
Account Information
Reporting
Dashboard
Data Exchange
My Personal Information

Home
Contact Us
Training

Setup Cardholder Account | Maintain Cardholder Account
Maintain Managing Account

Select a task to work.

Records 1 - 25 of 37
Page: 1 | 2

Refresh List

Request Type	Task (Select Task)	Product	Account Name	Start Date
CARDHOLDER SETUP	Reject - Auth Limits	Purchasing		11/02 14:24
CARDHOLDER SETUP	Reject - Default Acct Code Reject - Account Owner Details Reject - Auth Limits	Purchasing		11/02 14:18
CARDHOLDER SETUP	Final Review - CH Setup	Purchasing		11/02 14:02



Correcting Rejected Purchase Card Account Requests

The screenshot shows a web form titled "Enter Account Information". The first section is "Account Owner's Information", which is highlighted in red and labeled as "Editable | Rejected". A red box highlights the rejection reason: "Middle initial does not match form". Another red box highlights the text: "This section was rejected therefore it is editable". The form includes fields for "Reason for Rejection", "First Name" (John), "MI (optional)", "Last Name" (Doe), "Mailing Address" (Country: United States, Address Line 1: 2300 Main st).

- The rejection reason is listed in the corresponding section (e.g., Account Owner's Information).
- Only rejected sections are editable.
- After correcting all errors, the Request Coordinator clicks **Next** to complete the AXOL part of the process; then, the Request Coordinator replies to the Final Reviewer's email, attaching the request form and the training and warrant certificates.



Entering Purchase Card Account Requests in Access Online



Visit www.dm.usda.gov/procurement/ccsc/purchase_card.htm

for Entering and Final Approving Purchase Card Account Requests in Access Online Guide; CCSC Purchase Card Request Form; PDFs of this series of trainings; and many other resources.

