Visit AgLearn to complete the official training, Final Approving Purchase Card Account Requests in Access Online, and to receive proof of completion.
Final Approving Purchase Card Account Requests in Access Online
AgLearn Disclaimer: Section 508 Compliance

This purchase card training course complies with Section 508 of the Rehabilitation Act, which requires that federal agencies purchase electronic and information technology that is accessible to people with disabilities.

Visit Section508.gov for more information.
# Training Topics

1. Understanding the Purpose of Each Training  
2. Accessing Reference Materials  
3. Understanding the Entire Process  
4. Defining Roles & Responsibilities  
5. Understanding Final Approver Role & Expectations  
6. Examining Purchase Card Account Request Before Final Approving in Access Online  
7. Accessing the Active Work Queue in Access Online  
8. Accessing the Purchase Card Account Request in Access Online  
9. Understanding the Rejection Process  
10. Reviewing Product Settings  
11. Reviewing Account Owner’s Information  
12. Reviewing Account Details  
13. Reviewing Default Accounting Code  
14. Reviewing Authorization Limits  
15. Performing Final Approval of All Entered Account Information  
16. Performing Final Approval of a Previously Rejected Account Request
# Acronym List

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>APC</td>
<td>Agency Program Coordinator</td>
</tr>
<tr>
<td>AXOL</td>
<td>Access Online</td>
</tr>
<tr>
<td>CCSC</td>
<td>Charge Card Service Center</td>
</tr>
<tr>
<td>COOP</td>
<td>Continuity of Operations</td>
</tr>
<tr>
<td>LAPC</td>
<td>Local Agency Program Coordinator</td>
</tr>
</tbody>
</table>
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 Coordinator (APC) or a Local Agency Program 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 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.

<table>
<thead>
<tr>
<th>Training</th>
<th>Request Coordinator</th>
<th>Final Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering Purchase Card Account Requests in Access Online</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>How to Complete the Purchase Card Request Forms</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Final Approving Purchase Card Account Requests in Access Online</td>
<td></td>
<td>✔️</td>
</tr>
</tbody>
</table>
Accessing Reference Materials

Charge Card Service Center (CCSC) Purchase Card Request Form

- CCSC strongly encourages everyone to do the following:
  - Pause the training;
  - Download from the CCSC website the **CCSC Purchase Card Request Form**; and
  - Review the form.

- The CCSC website is located at [https://www.dm.usda.gov/procurement/ccsc/purchase_card.htm](https://www.dm.usda.gov/procurement/ccsc/purchase_card.htm).
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 4-8 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.
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

Start

AO Submits New Purchase Card Account Request Package

Request Coordinator Approves Package

Request Coordinator Enters Information in Access Online

Request Coordinator Emails Package to Final Approver

Final Approver Approves Package

Final Approver Validates 100 Percent Match of Information on Form to Information in Access Online

U.S. Bank Processes Request

Cardholder Receives New Card in 7-10 Business Days

End

Yes

No

No

No

Yes
Understanding the Entire Process

Obtaining AXOL Permissions

- An APC submits to the CCSC the request, along with proof of training, for an APC—primary or alternate—to serve as a Final Approver.
- CCSC grants APCs the AXOL permissions to serve as Final Approvers.
- The Final Approver inspects a Purchase Card Account Request in AXOL after receiving an email notification, including required documentation, from a Request Coordinator of a Purchase Card Account Request ready for final approval in AXOL.
- Section 3.3 of *Entering and Final Approving Purchase Card Account Requests in Access Online* details the formal process for seeking Final Approver 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.

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

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Request Coordinator</th>
<th>Final Approver</th>
<th>CCSC</th>
<th>U.S. Bank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answers questions from APCs and LAPCs.</td>
<td></td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Checks card status in AXOL.</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emails the Final Approver with Purchase Card Account Request Package.</td>
<td></td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retains emailed Purchase Card Account Request Packages.</td>
<td></td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provides training to Request Coordinators and Final Approvers.</td>
<td></td>
<td></td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Works with APCs to prevent purchase card-related errors.</td>
<td></td>
<td></td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Issues cards for all approved card requests in AXOL.</td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
</tr>
</tbody>
</table>
Understanding Final Approver Role & Expectations

Exploring Final Approver Role Details

- The Final Approver is the last line of defense for ensuring the submission of a high-quality Purchase Card Account Request Package.

- The Final Approver ensures the following:
  - 100 percent compliance of the paper-based Purchase Card Account Request and of the AXOL Cardholder Account Setups with Chapters 4, 5, 6 and 7 of the guide, *Entering and Final Approving Purchase Card Account Requests in Access Online*; and
  - 100 percent verification of the information on the paper-based Purchase Card Account Request to information in U.S. Bank’s AXOL.

- If the paper-based Purchase Card Account Request contains omitted or incorrect information or does not match information in AXOL, the Final Approver must do the following:
  - Reject the Purchase Cardholder Account Setup in AXOL.
  - Return the paper-based Purchase Card Account Request to the Request Coordinator for correction.
Understanding Final Approver Role & Expectations

- The Final Approver approves the Purchase Card Account Request in AXOL only when the following two events occur:
  - The paper-based Purchase Card Account Request achieves **100 percent compliance** with Chapters 4, 5, 6 and 7 of the guide, *Entering and Final Approving Purchase Card Account Requests in Access Online*.
  - The paper-based Purchase Card Account Request achieves **100 percent verification** to information in U.S. Bank’s AXOL.
- The Final Approver’s compliance with requirements in *Entering and Final Approving Purchase Card Account Requests in Access Online* influences his or her agency’s ability to achieve Agency of the Quarter for the CCSC Purchase Card Program.
Examining Purchase Card Account Request Before Final Approving in Access Online

- When the Final Approver confirms the 100 percent compliance of the Purchase Card Package, only then he or she begins the review of the information in AXOL.

- When the Final Approver encounters one or more errors or omissions with the Purchase Card Package, then he or she returns the Purchase Card Package to the Request Coordinator for correction and resubmission.

- Each month CCSC reviews all entered requests and notifies each APC of any incorrectly entered requests. The results are part of the formula for determining the Agency of the Quarter.

- The Final Approver does not confirm that a future Cardholder is not an existing Approving Official or an existing Cardholder in the same hierarchy as the new Purchase Card.
  
  - The Request Coordinator is responsible for the above-mentioned confirmation.
  
  - If more information is needed, the *Entering Purchase Card Account Requests in Access Online* training details the above process.
Examining Purchase Card Account Request Before Final Approving in Access Online

Reviewing the Purchase Card Package

- The Final Approver reviews the Purchase Card Package for completeness before entering any information into Access Online.

- The Final Approver 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™.

- The How To Complete the Purchase Card Request Forms training provides more details.
Accessing the Active Work Queue in Access Online

Accessing the Request

- The Final Approver logs into Access Online using his or her User ID and password.
  - URL = https://access.usbank.com
  - Organization Short Name = USDA

- The Final Approver selects Active Work Queue from the left navigation and then the Cardholder from the table in the Active Work queue.
  a. User headers in the table to sort.
  b. To locate a card, search for Final Review under Task.
  c. To locate a specific person, search by Account Name.
  d. Click Final Review under Task.
Accessing the Purchase Card Account Request in Access Online

- The Final Approver is automatically directed to the page showing the entire submission.
- The Final Approver begins his or her approval by carefully reviewing the screen.
- The next segment of this training discusses the steps for **Rejecting a Purchase Card Request in Access Online**; the following segment discusses final approving a purchase card request by starting with **Defining Product Settings**.

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

Following the Rejection Process in AXOL for Any Section

- The Final Approver sees the whole submission on one screen and begins reviewing each section.

- After clicking **Reject** on the top right corner of a given section, the Final Approver is directed to the **Reason for Rejection** page.

- The Final Approver specifies the rejection reasons (e.g., errors) for a given section in the **Reason for Rejection** field and clicks **Submit**.

- The Final Approver continues to the next section, performs the above-mentioned actions to reject any additional sections with errors, and emails the Request Coordinator after completing the review.
Understanding the Rejection Process

Emailing the Request Coordinator about a Rejected Request

- A rejection email is necessary because AXOL does not inform the Request Coordinator when the Final Approver rejects or approves a request.

- The CCSC currently uses an email template to communicate one or more rejections.
  - See the graphic for an example of an actual email from CCSC to a Request Coordinator.
  - The Request Coordinator must reply to this email when notifying a Final Approver about any rejected Purchase Card Request.

![Email Template Graphic]
Reviewing Product Settings

- Using the information on the completed Purchase Card Request Form, the Final Approver compares all information to information in AXOL. *(See the instructions in the table below.)*

- The Final Approver scrolls to the next section if all information on the form and in AXOL matches 100 percent.

- The Final Approver clicks **Reject** if any information is incorrect, missing or mismatching. *(See earlier slides for details.)*

<table>
<thead>
<tr>
<th>Field</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Purchasing</td>
</tr>
<tr>
<td>Processing Hierarchy</td>
<td>Must match Purchase Card Request Form</td>
</tr>
<tr>
<td>Physical Card</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Reviewing Account Owner’s Information

Checking Account Owner’s Information

- Using the information on the completed Purchase Card Request Form, the Final Approver compares all information to information in AXOL. (See next slide for details.)

- The Final Approver scrolls to the next section if all information on the form and in AXOL matches 100 percent.

- The Final Approver clicks **Reject** if any information is incorrect, missing or mismatching. (See earlier slides for details.)
### Reviewing Account Owner’s Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Must match Purchase Card Request Form.</td>
</tr>
<tr>
<td>MI</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Mailing Address</td>
<td>Must match Purchase Card Request Form and Global Address List.</td>
</tr>
<tr>
<td>Work Phone</td>
<td>Must match Purchase Card Request Form and Global Address List.</td>
</tr>
<tr>
<td>Email</td>
<td>Must be a valid USDA email address. Must match Purchase Card Request Form and Global Address List.</td>
</tr>
<tr>
<td>Optional 1</td>
<td>Must reflect Purchase Card Request Form. Enter FOREIGN NATL N if no on the form; FOREIGN NATL Y if yes on the form.</td>
</tr>
<tr>
<td>Third Line Embossing</td>
<td>Obtain correct usage from agency’s APC.</td>
</tr>
<tr>
<td>Account Owner’s Information</td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>Must contain the initialed and dated Certification Statement.</td>
</tr>
</tbody>
</table>
Reviewing Account Details

Checking Account Details

- Using the information on the completed Purchase Card Request Form, the Final Approver compares all information to information in AXOL. (See next slide for details.)

- Scroll to the next section if all information on the form and in AXOL matches 100 percent.

- Click **Reject** if any information is incorrect, missing or mismatching. (See earlier slides for instructions.)
# Reviewing Account Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Checks?</td>
<td>Must match Purchase Card Request Form. Confirm Yes if requesting Convenience Checks; No if not requesting Convenience Checks.</td>
</tr>
<tr>
<td>Reporting Level</td>
<td>Must match Purchase Card Request. Be mindful of this commonly-missed field.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Must match Purchase Card Request Form. Be mindful of this commonly-missed field.</td>
</tr>
<tr>
<td>Account Details Comments</td>
<td>If the card is used for Continuity of Operations (COOP), must have COOP in the field box.</td>
</tr>
</tbody>
</table>
Reviewing Default Accounting Code

Checking Default Accounting Code

- Using the information on the completed Purchase Card Request Form, the Final Approver compares all information to information in AXOL.
- The Final Approver scrolls to the next section if all information on the form and in AXOL matches 100 percent.
- The Final Approver clicks **Reject** if any information is incorrect, missing or mismatching. *(See earlier slides for details.)*

<table>
<thead>
<tr>
<th>Field</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line of Accounting</td>
<td>Must match Purchase Card Request Form.</td>
</tr>
<tr>
<td>BOC</td>
<td>Always lists 2670.</td>
</tr>
</tbody>
</table>
Reviewing Authorization Limits

Checking Authorization Limits

- Using the information on the completed Purchase Card Request Form, the Final Approver compares all information to information in AXOL. *(See next slide for details.)*

- If all information on the form and in AXOL matches 100 percent, the Final Approver clicks the **Approve** button.

- The Final Approver clicks **Reject** if any information is incorrect, missing or mismatching. *(See earlier slides for details.)*
# Reviewing Authorization Limits

<table>
<thead>
<tr>
<th>Field</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Credit Limit</td>
<td>Must match Monthly Office Limit on Purchase Card Request Form.</td>
</tr>
<tr>
<td>Single Purchase Limit</td>
<td>Must match Purchase Card Request Form. Confirm the submission of a signed warrant if Single Purchase Limits exceeds $3,500.</td>
</tr>
<tr>
<td>Cash Withdrawal Limit (%)</td>
<td>Lists 0 if convenience checks not requested in Account Details section and on the Purchase Card Request Form. Lists 20 if requested.</td>
</tr>
<tr>
<td>Authorization Limit Comments</td>
<td>Confirm the appearance of a Warrant Number in comments box if the Single Purchase Limit exceeds $3,500.</td>
</tr>
</tbody>
</table>
Performing Final Approval of All Entered Account Information

Completing the Final Approval Process

- After clicking the Approve button, the Final Approver notifies the Request Coordinator by email of the request’s approval.

- The CCSC currently uses an email template to communicate the request’s status (see graphic).

  This graphic provides a real example of an actual email, which includes the email chain, from Final Approver (CCSC) to Request Coordinator.
Performing Final Approval of a Previously Rejected Account Request

Final Approving a Corrected Rejected Account Request

- The Final Approver receives an email (including the email chain) from the Request Coordinator informing the Final Approver of a corrected request waiting for his or her Final Approval.

- The Final Approver follows the same process outlined earlier in this training.

**Remember:** If a purchase card account request is not final approved in AXOL within **30 days** of submission, AXOL purges the request.
Final Approving Purchase Card Account Requests in Access Online

Visit [www.dm.usda.gov/procurement/ccsc/purchase_card.htm](http://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.