

# New Purchase Card Approving Official Onboarding Checklist

**Purchase Card Approving  
Official Name and Job Title:** \_\_\_\_\_

[REE Purchase Card Approving Official Training Directions](#)

<b>Training Requirements:</b> Completed all training requirements within one (1) calendar year of submission.					
AgLearn: USDA Purchase Card Training for New Cardholders/Approving Officials	<input type="checkbox"/>				
AgLearn: USDA Federal Appropriations Law Training	<input type="checkbox"/>				
AgLearn: AbilityOne Program Training	<input type="checkbox"/>				
AgLearn: Ethics: Government Purchase Card Training	<input type="checkbox"/>				
Buy Green GSA SmartPay Purchase Card Blueprint for Success	<input type="checkbox"/>				
Micro-purchases and Section 508 Requirements	<input type="checkbox"/>				
US Bank Access Online Web-Based Training <ul style="list-style-type: none"> <li>• Lessons under '<u>Get started using Access Online</u>':               <ol style="list-style-type: none"> <li>1) Alerts and Notifications</li> <li>2) My Personal Information</li> <li>3) Navigation Basics</li> </ol> </li> <li>• Lessons under '<u>Manage Approvals</u>':               <ol style="list-style-type: none"> <li>4) Transaction Approval Process (DOT, USDA, GAO)</li> </ol> </li> <li>• Lessons under '<u>Create and Run Reports and Statements</u>':               <ol style="list-style-type: none"> <li>5) Standard Reports</li> <li>6) Scheduled Reports</li> <li>7) Flex Data Reports</li> </ol> </li> </ul>	<input type="checkbox"/>				
<b>Training Requirement for Requesting Convenience Checks:</b>					
<b><i>Purchase Cardholder Approving Official please answer the questions below:</i></b>					
1. Is there another Purchase Cardholder in your Division that has Convenience Checks?  <div style="text-align: right;"><i>(Please check yes or no in the box).</i></div>	<table style="margin-left: auto; margin-right: auto;"> <tr> <td style="padding: 0 10px;">Yes</td> <td>No</td> </tr> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </table>	Yes	No	<input type="checkbox"/>	<input type="checkbox"/>
Yes	No				
<input type="checkbox"/>	<input type="checkbox"/>				
2. Is there another Purchase Cardholder in your Funding Office that has Convenience Checks?  <div style="text-align: right;"><i>(Please check yes or no in the box).</i></div>	<table style="margin-left: auto; margin-right: auto;"> <tr> <td style="padding: 0 10px;">Yes</td> <td>No</td> </tr> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </table>	Yes	No	<input type="checkbox"/>	<input type="checkbox"/>
Yes	No				
<input type="checkbox"/>	<input type="checkbox"/>				
If the Purchase Cardholder Approving Official checked no to questions 1. & 2. above, attached a written justification why there is a true need for convenience checks (CC). Please list the specific types of transactions and estimated dollar amount for which CC's are needed. The transactions should be described in detail, and why it cannot be purchased using another payment method. Also explain how the location's mission would be harmed if the specific(s) transactions mentioned are not paid by CC's.					

<b>To be completed by the Purchase Cardholder:</b>	
The Purchase Cardholder will need to complete the <a href="#">USDA Purchase Card Program Convenience Check Course (FY 2021)</a>	
<b>Additional Requirements:</b>	
For ARS locations only: The Administrative Officer (AO) is aware and approves this request.	<input type="checkbox"/>
Complete, sign, (digitally preferred), and attach <a href="#">Approving Official Appointment/Maintenance Request Form</a> .	<input type="checkbox"/>

Please combine all Certificates of Completion, the Approving Official Appointment/Maintenance Request Form, and this onboarding checklist together in a single PDF file and send to the Purchase Card Program and Oversight Branch (PCPOB) by entering a request in the [AFM Customer Service Portal \(AFMCSP\)](#) under the Acquisition Tab, Record Type "Purchase Card". If you do not have access to the AFMCSP please contact your Administrative Officer for assistance.