

# New Government Purchase Cardholder Onboarding Checklist

**Purchase Cardholder Legal Name (including Middle Initial), GS Series, and Job Title:** \_\_\_\_\_

Does the Purchase Cardholder have a Federal Acquisition Certification for Contracting Officer's Representative (FAC-COR)?

Please check: Yes      No

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

**REE Purchase Cardholder Training Directions are available on the [REE Purchase Card Axon Page](#) under Onboarding and Off Boarding Guidance and forms**

<b>Training Requirements</b> Completed all training requirements within one (1) calendar year of submission.	
USDA Purchase Card Program Policy Training for New Program Participants (All Purchase Cardholders)	
USDA Federal Appropriations Law Training (All Purchase Cardholders)	
US Bank Access Online Web-Based Training (All Purchase Cardholders) <ul style="list-style-type: none"> <li>• Lessons under '<u>Get started using Access Online</u>': <ol style="list-style-type: none"> <li>1) My Personal Information</li> <li>2) Navigation Basics</li> <li>3) Online Registration</li> <li>4) View Statements</li> <li>5) Alerts and Notifications</li> </ol> </li> <li>• Lessons under '<u>Work with transactions</u>': <ol style="list-style-type: none"> <li>6) 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>7) Reporting</li> </ol> </li> </ul>	
Ethics: Government Purchase Card Training (Non-Warranted Purchase Cardholders only)	
AbilityOne Program Training (Non-Warranted Purchase Cardholders only)	
Buy Green GSA SmartPay® Purchase Card Blueprint for Success (Non-Warranted Purchase Cardholders only)	
Micro-purchases and Section 508 Requirements (Non-Warranted Purchase Cardholders only)	
<b>If convenience checks are requested, the following training must be completed in AgLearn, and a justification for convenience checks must be provided. See Training Directions for more information.</b>	
USDA Convenience Check Procedures for Program Participants	
USDA Convenience Check Policy Training	
<b>Onboarding Checklist</b>	
For ARS locations only: The Administrative Officer (AO) is aware and approves this request.	
Complete, sign (digitally preferred), and attach <a href="#">Cardholder Request for Purchase Card Form</a> .	

Please combine all Certificates of Completion, the Cardholder Request for Purchase Card 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.