**Processing New Purchase Card Role Request**

**November 2023**

**New Cardholder request**

1. Complete the required 4 TMS trainings.
2. GSA SmartPay #3870979,
3. VA Online Training #5863,
4. Unauthorized Commitments #1701572, and
5. VA Directive 6008 Acquisition and Management of VA IT Resources, TMS# 4407221

The cardholder will need to register in the Charge Card Portal (CCP) <https://vaww.ccp.fsc.va.gov>***(Note make sure to verify your TMS User ID under My learning; then select my information)***

1. The A/OPC or alternate A/OPC will create the VA Form 0242 in CCP including the SPL and MPL amounts.
   * + **SPL (Single Purchase Limit)** 
       - The SPL can be set at up to $10,000 (GOE)
       - $3,500 (VRE)
     + **MPL (Monthly Purchase Limit) maximum without justification**

* **Supplies: $25K per month**
* **Training: $25K per month**
* **VR&E: $50K per month**

1. The cardholder will sign the 0242 when prompted and the 0242 will properly route to A/O, alt A/O, DOA, and Level 1 A/OPC approval
2. The A/OPC will create the cardholder’s profile and card in US Bank <https://access.usbank.com>
3. The cardholder should register for an iFAMS account in iFAMS. Instructions are available on the Self-Service Portal [IAM Toolkit](https://mvitkssoi.iam.va.gov/imdquiWeb/provBlueHome.action). Please use the [How to Request Annual Certification Access in iFAMS.pdf](https://dvagov.sharepoint.com/:b:/r/sites/OITFSCCollaboration/iFAMSGR/Shared%20Documents/VBA/General%20Information/Access/How%20to%20Request%20Annual%20Certification%20Access%20in%20iFAMS.pdf?csf=1&web=1&e=DXTbtv).
4. Once card has been received it will need to register in CCP by cardholder and A/OPC will add card into iFAMS.
5. Complete the CAATS access form VA 8824h Approving Official and Title signature => Level 2 A/OPC VBA ([OPERATIONS.VBACO@va.gov](mailto:OPERATIONS.VBACO@va.gov)) Tiyhon L. Caldwell. Submit signed forms to VBAALAC\_CAATSTEAM [VBAALAC\_CAATSTEAM@va.gov](mailto:VBAALAC_CAATSTEAM@va.gov) for processing [VRE Purchase Card Module - Access - Updated 01.20.2023.pptx](https://dvagov.sharepoint.com/:p:/r/sites/vbaofmhub/VBAORM_Archive/Fin_TeamSite_Archive/fin/fin241c/purchase_card/VRE%20Purchase%20Card%20Module%20-%20Access%20-%20Updated%2001.20.2023.pptx?d=w9c3d6b34917d4b5ab8745e5fc6e34fab&csf=1&web=1&e=XMkRu1).

**New A/O or Alternate A/O request**

1. Complete the 4 required TMS trainings.
2. GSA SmartPay #3870979,
3. VA Online Training #5863,
4. Unauthorized Commitments #1701572 and
5. VA Directive 6008 Acquisition and Management of VA IT Resources, TMS# 4407221
6. The Approving Official will need to register in the Charge Card Portal (CCP) <https://vaww.ccp.fsc.va.gov>

***(Note make sure to verify your TMS User ID under My learning; then select my information)***

1. The A/OPC or alternate A/OPC will create an VA Form 0242 in CCP for all cardholders including the SPL and MPL
2. Cardholders will sign the 0242 when prompted and the 0242 will properly route to A/O, alt A/O, DOA, and Level 1 A/OPC approval.
3. The A/OPC will create the A/O’s or alternate A/O’s profile in US Bank <https://access.usbank.com>
4. The user should register for an iFAMS account in iFAMS. Instructions are available on the Self-Service Portal [IAM Toolkit](https://mvitkssoi.iam.va.gov/imdquiWeb/provBlueHome.action). Please use the [How to Request Annual Certification Access in iFAMS.pdf](https://dvagov.sharepoint.com/:b:/r/sites/OITFSCCollaboration/iFAMSGR/Shared%20Documents/VBA/General%20Information/Access/How%20to%20Request%20Annual%20Certification%20Access%20in%20iFAMS.pdf?csf=1&web=1&e=DXTbtv).
5. Complete the CAATS access form VA 8824h Approving Official and Title signature => Level 2 A/OPC VBA ([OPERATIONS.VBACO@va.gov](mailto:OPERATIONS.VBACO@va.gov)) Tiyhon L. Caldwell. Submit signed forms to VBAALAC\_CAATSTEAM [VBAALAC\_CAATSTEAM@va.gov](mailto:VBAALAC_CAATSTEAM@va.gov) for processing [VRE Purchase Card Module - Access - Updated 01.20.2023.pptx](https://dvagov.sharepoint.com/:p:/r/sites/vbaofmhub/VBAORM_Archive/Fin_TeamSite_Archive/fin/fin241c/purchase_card/VRE%20Purchase%20Card%20Module%20-%20Access%20-%20Updated%2001.20.2023.pptx?d=w9c3d6b34917d4b5ab8745e5fc6e34fab&csf=1&web=1&e=XMkRu1).

**New A/OPC or Alternate A/OPC request (RO)**

1. Complete the 4 required TMS trainings.
2. GSA Online Training for A/OPC’s #3870980;
3. VA Online Training #5863;
4. Unauthorized Commitments #1701572; and
5. VA Directive 6008 Acquisition and Management of VA IT Resources, TMS# 4407221
6. The cardholder will need to register in the Charge Card Portal (CCP) <https://vaww.ccp.fsc.va.gov>

***(Note make sure to verify your TMS User ID under My learning; then select my information)***

1. The following will be emailed to Office of Financial Management (OFM) Purchase Card mailbox:
2. [US Bank POC Maintenance Form](https://www.usbank.com/dam/documents/pdf/commercial-banking/government-forms/CPS-GSA-Ci-Purchasing-Point-of-Contact-Maintenance-Form.pdf)
3. Delegation of Authority (DOA) Memo from the SSD Chief **(not in the purchase card hierarchy)**, the RO Director or Assistant Director authorizing the individual A/OPC duties for the RO
4. Create an VA Form 0242 in CCP for all cardholders including the SPL and MPL
5. Cardholders will sign the 0242 when prompted and the 0242 will properly route to A/O, alt A/O, DOA and Level 1 A/OPC approval.
6. Create the A/OPC’s or alternate A/OPC’s profile in US Bank <https://access.usbank.com>
7. The new user should register for an iFAMS account in iFAMS. Instructions are available on the Self-Service Portal [IAM Toolkit](https://mvitkssoi.iam.va.gov/imdquiWeb/provBlueHome.action). Please use the [How to Request Annual Certification Access in iFAMS.pdf](https://dvagov.sharepoint.com/:b:/r/sites/OITFSCCollaboration/iFAMSGR/Shared%20Documents/VBA/General%20Information/Access/How%20to%20Request%20Annual%20Certification%20Access%20in%20iFAMS.pdf?csf=1&web=1&e=DXTbtv).
8. OFM will forward US Bank POC Maintenance Form to FSC/ Purchase Card Operations
9. Complete the CAATS access form VA 8824h Approving Official and Title signature => Level 2 A/OPC VBA ([OPERATIONS.VBACO@va.gov](mailto:OPERATIONS.VBACO@va.gov)) Tiyhon L. Caldwell. Submit signed forms to VBAALAC\_CAATSTEAM [VBAALAC\_CAATSTEAM@va.gov](mailto:VBAALAC_CAATSTEAM@va.gov) for processing [VRE Purchase Card Module - Access - Updated 01.20.2023.pptx](https://dvagov.sharepoint.com/:p:/r/sites/vbaofmhub/VBAORM_Archive/Fin_TeamSite_Archive/fin/fin241c/purchase_card/VRE%20Purchase%20Card%20Module%20-%20Access%20-%20Updated%2001.20.2023.pptx?d=w9c3d6b34917d4b5ab8745e5fc6e34fab&csf=1&web=1&e=XMkRu1).