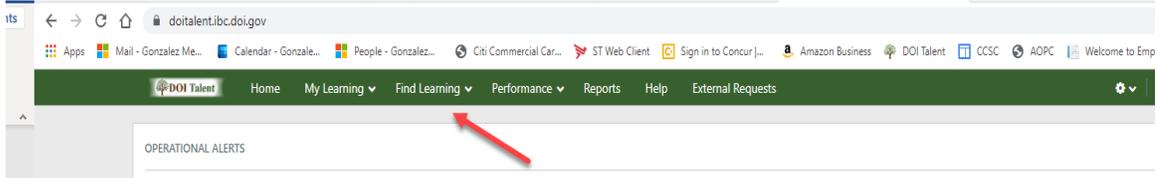


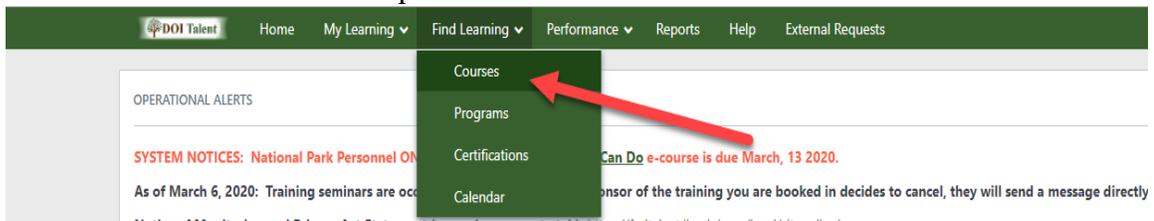
# CARDHOLDER – PURCHASE (DETAILED INSTRUCTIONS)

Access [DOI Talent](#) (Recommended Browsers: Use the Chrome or Edge browsers when accessing DOI Talent. Do not use IE 11).

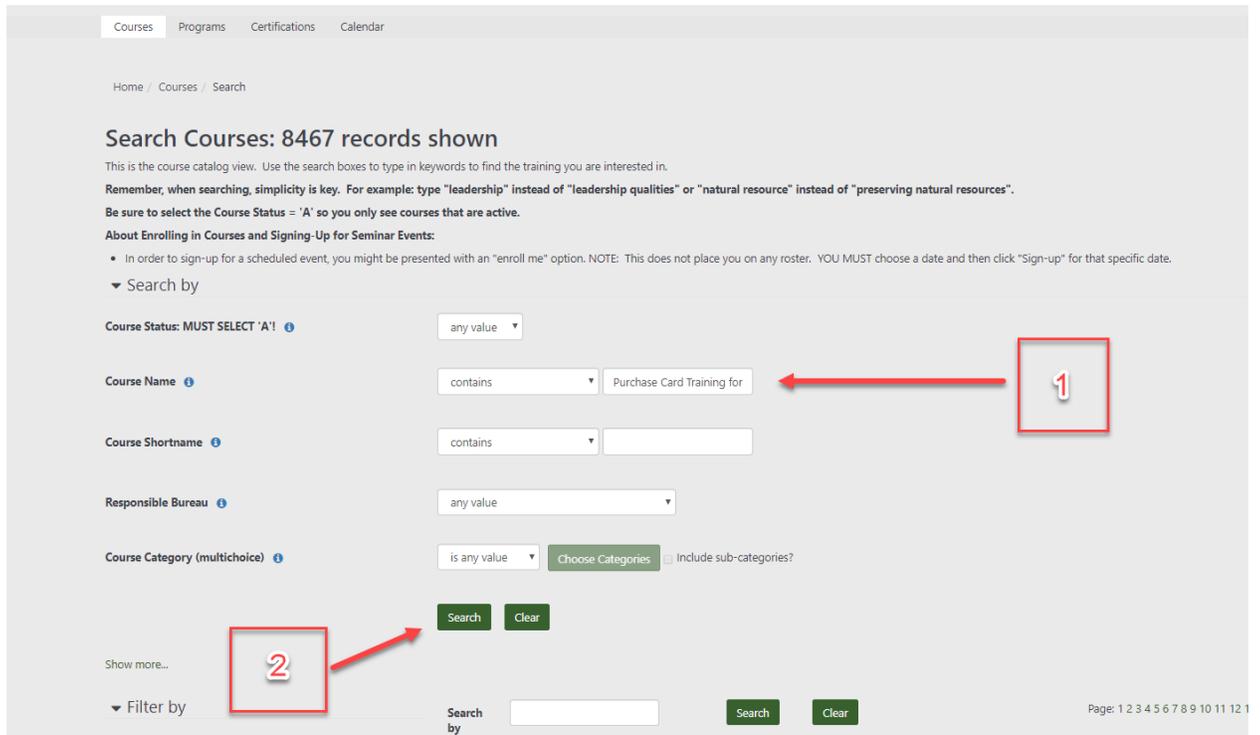
1. Click on the “Find Learning” tab.



2. Select “Courses” from the drop-down menu.



3. Type the course name, “Purchase Card Training for Cardholders”<sup>1</sup>, and click on Search<sup>2</sup>.



4. Click on the course name:

Search by

Course Status: MUST SELECT 'A'!

Course Name

Course Shortname

Responsible Bureau

Course Category (multichoice)    Include sub-categories?

Show more...

Filter by

Search by

Course Icon	Course Name	Course Shortname	Course Type	Responsible Bureau	Requires Approval	Training Tuition Costs	Content	Duration	Contact Name/Email
	<a href="#">Purchase Card Training for Cardholders</a>	DOI-CCTmg-CH-Purch	Blended	Office of the Secretary	No	0.00		1	Ken Casey/kenneth_casey@ios.doi.gov

5. Click on the “Enroll me” button to self-enroll in the course.

Self enrollment (Learner)

## Step 1: Take the GSA Purchase Card Training for Cardholders

1. You must read and understand the information provided in Step 1 in DOI Talent.

Step 1: Take the GSA Card Training for Purchase Cardholders

Take the GSA Card Training for Purchase Cardholders

This link will take you to the GSA course which is intended to teach you the basics about your roles and responsibilities as a purchase cardholder.

- You must create a login and password at the GSA website to take the course there, unless you already have one.
- Once you've completed the training on the GSA website, close the browser window and return to this page to complete the additional steps below.
- IMPORTANT: Be sure to download the GSA completion certificate once you've completed the training there.**
- You will be required to take this training every 3 years as refresher training per DOI Charge Card Policy.

2. You must then click on the “Take the GSA Purchase Card Training for Cardholders” link to transfer to the GSA course. **NOTE:** A new window for the GSA website will open.

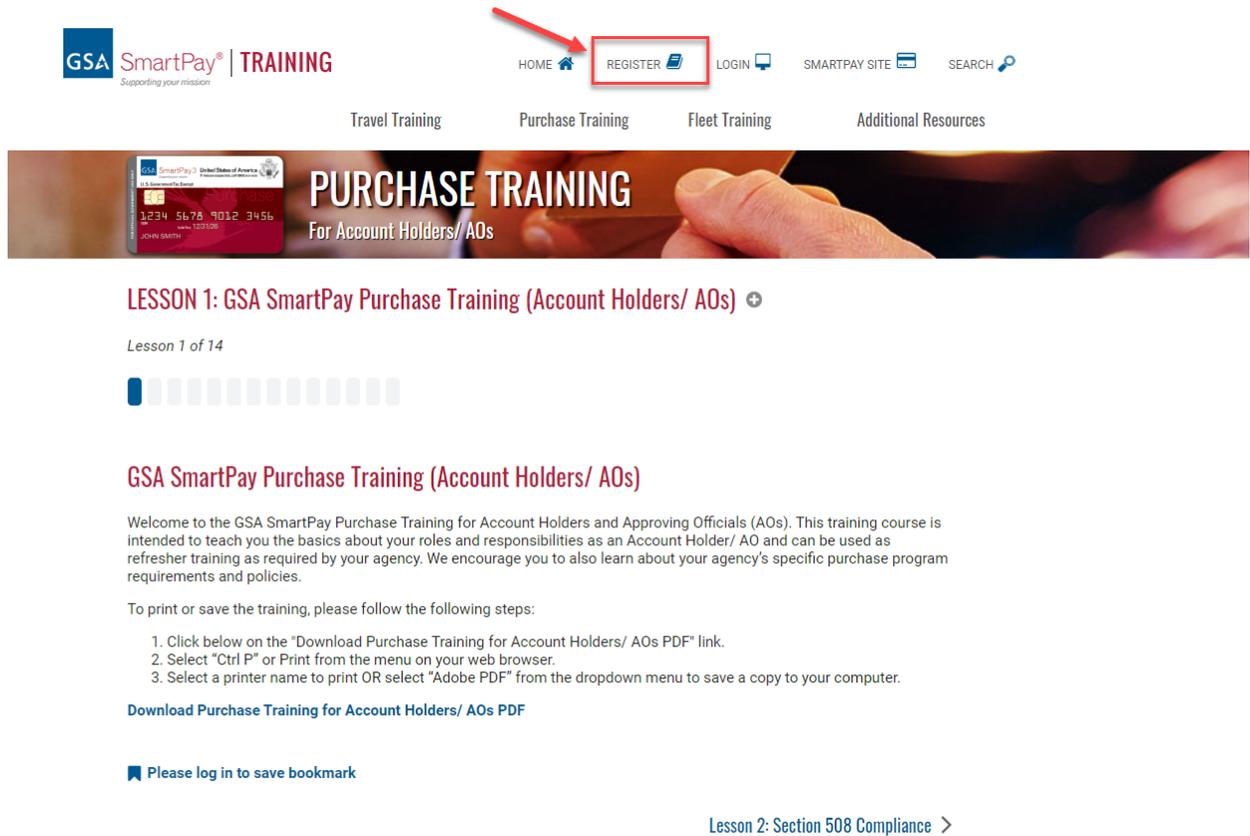
Step 1: Take the GSA Card Training for Purchase Cardholders

[Take the GSA Card Training for Purchase Cardholders](#)

This link will take you to the GSA course which is intended to teach you the basics about your roles and responsibilities as a purchase cardholder.

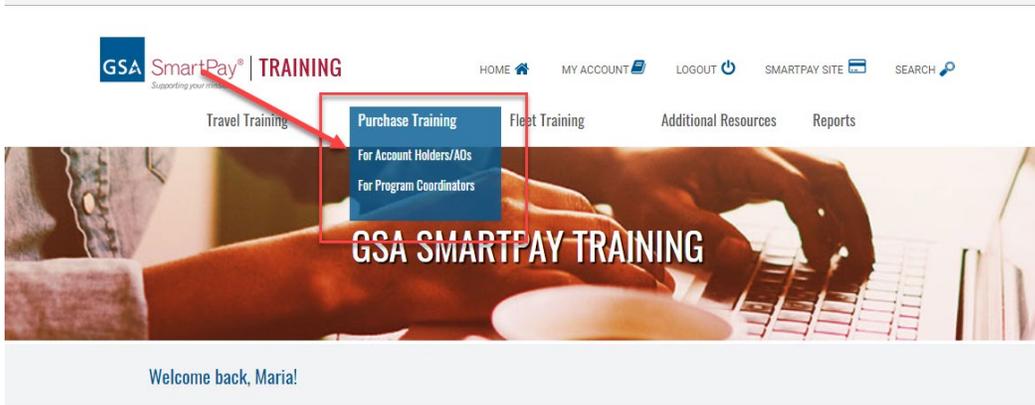
- You must create a login and password at the GSA website to take the course there, unless you already have one.
- Once you've completed the training on the GSA website, close the browser window and return to this page to complete the additional steps below.
- IMPORTANT: Be sure to download the GSA completion certificate once you've completed the training there.**
- You will be required to take this training every 3 years as refresher training per DOI Charge Card Policy.

3. Click on “Register” to create an account, which will require you to create a password.



The screenshot shows the GSA SmartPay Training website. The header includes the GSA SmartPay logo with the tagline "Supporting your mission" and the word "TRAINING" in large red letters. Navigation links include HOME, REGISTER (highlighted with a red box and arrow), LOGIN, SMARTPAY SITE, and SEARCH. Below the header are menu items for Travel Training, Purchase Training, Fleet Training, and Additional Resources. A banner for "PURCHASE TRAINING For Account Holders/AOs" features a SmartPay card. Below the banner, the page title is "LESSON 1: GSA SmartPay Purchase Training (Account Holders/ AOs)" with a plus icon. It indicates "Lesson 1 of 14" with a progress bar. The main heading is "GSA SmartPay Purchase Training (Account Holders/ AOs)". The introductory text states: "Welcome to the GSA SmartPay Purchase Training for Account Holders and Approving Officials (AOs). This training course is intended to teach you the basics about your roles and responsibilities as an Account Holder/ AO and can be used as refresher training as required by your agency. We encourage you to also learn about your agency's specific purchase program requirements and policies." It then lists steps for printing or saving the training: 1. Click below on the "Download Purchase Training for Account Holders/ AOs PDF" link. 2. Select "Ctrl P" or Print from the menu on your web browser. 3. Select a printer name to print OR select "Adobe PDF" from the dropdown menu to save a copy to your computer. A link "Download Purchase Training for Account Holders/ AOs PDF" is provided. At the bottom, there is a note "Please log in to save bookmark" and a link "Lesson 2: Section 508 Compliance >".

4. Once registered, click on the ‘For Account Holders/AOs’ option on the blue “Purchase Training” box.



### Select Training Course

GSA SmartPay offers a variety of training courses for Account Holders and Program Coordinators based on business line. You can browse any training course content listed below. To complete the course and receive your certificate, you must login and pass your quiz.

<b>TRAVEL TRAINING</b> For Account Holders/AOs For Program Coordinators	<b>PURCHASE TRAINING</b> For Account Holders/AOs For Program Coordinators	<b>FLEET TRAINING</b> For Program Coordinators	<b>ADDITIONAL RESOURCES</b> Videos
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5. Once you have read Lesson 1, continue to Lesson 2, and so on until you have completed the training. Lessons 1 through 13 are for cardholders and approving officials; Lesson 14

provides further training for approving officials.

The screenshot shows the GSA SmartPay Training website. At the top, there is a navigation bar with the GSA SmartPay logo and the word "TRAINING". To the right of the logo are links for HOME, MY ACCOUNT, LOGOUT, SMARTPAY SITE, and SEARCH. Below the navigation bar are five menu items: Travel Training, Purchase Training, Fleet Training, Additional Resources, and Reports. The main content area features a banner for "PURCHASE TRAINING For Account Holders/ AOs" with an image of a GSA SmartPay card. Below the banner is the section title "LESSON 1: GSA SmartPay Purchase Training (Account Holders/ AOs)" with a plus sign icon. Underneath is "Lesson 1 of 14" and a progress indicator consisting of 14 small squares, with the first one filled. The main heading for the lesson is "GSA SmartPay Purchase Training (Account Holders/ AOs)". The introductory text states: "Welcome to the GSA SmartPay Purchase Training for Account Holders and Approving Officials (AOs). This training course is intended to teach you the basics about your roles and responsibilities as an Account Holder/ AO and can be used as refresher training as required by your agency. We encourage you to also learn about your agency's specific purchase program requirements and policies." Below this is a list of steps to print or save the training: "To print or save the training, please follow the following steps: 1. Click below on the 'Download Purchase Training for Account Holders/ AOs PDF' link. 2. Select 'Ctrl P' or Print from the menu on your web browser. 3. Select a printer name to print OR select 'Adobe PDF' from the dropdown menu to save a copy to your computer." A link "Download Purchase Training for Account Holders/ AOs PDF" is provided. Below that is a bookmark icon and the text "Bookmark my place and return later". A red arrow points from the right side of the page to a button labeled "Lesson 2: Section 508 Compliance >".

6. After completing the appropriate lessons, cardholders and approving officials must take a 25-question quiz. Click on the “**Start Quiz**” link. If you wish to retake the quiz, click on the blue “Take” button to restart it.



View My Certificates My results Take Retake Quiz

### QUIZ: Quiz on GSA SmartPay Purchase Account (Account Holders/AOs) +

#### Quiz on GSA SmartPay Purchase Account (Account Holders/AOs)

Now that you have completed the training portion of the GSA SmartPay Purchase Account Online Training, you are ready to take your quiz. Once you have completed and successfully passed your quiz with a minimum score of 75%, you will receive your completion certificate. The certificate can be saved or printed from the training website.

Start Quiz > Start Quiz

- After taking the training and completing the quiz, press “Finish” to view your results. Click on “My Certificates” to view your certificate.



View My Certificates My results Take

You got 25 of 25 possible points.

Your score: 100%

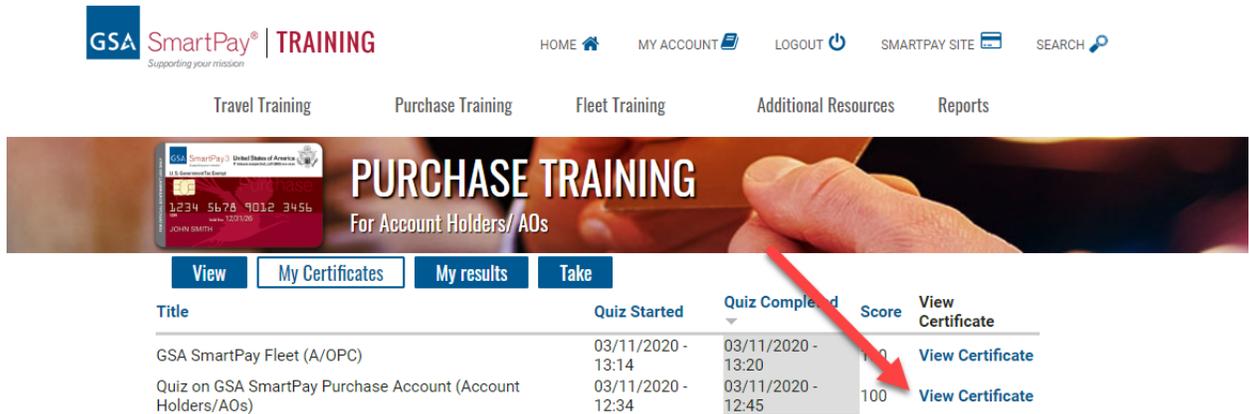
Question 1

Multiple choice question

A single purchase limit is:

Your answer	Choice	Score	Feedback	Correct answer	Score: 1 of 1
→	The maximum amount of money that can be charged to the GSA SmartPay purchase account for a single transaction.	1		✓	

8. Click on “View Certificate”.



The screenshot shows the GSA SmartPay TRAINING website interface. At the top, there is a navigation bar with links for HOME, MY ACCOUNT, LOGOUT, SMARTPAY SITE, and SEARCH. Below this is a secondary navigation bar with links for Travel Training, Purchase Training, Fleet Training, Additional Resources, and Reports. The main content area features a banner for 'PURCHASE TRAINING For Account Holders/ AOs' with a 'View' button. Below the banner is a table of quiz results. A red arrow points to the 'View Certificate' link in the second row of the table.

Title	Quiz Started	Quiz Completed	Score	View Certificate
GSA SmartPay Fleet (A/OPC)	03/11/2020 - 13:14	03/11/2020 - 13:20	100	<a href="#">View Certificate</a>
Quiz on GSA SmartPay Purchase Account (Account Holders/AOs)	03/11/2020 - 12:34	03/11/2020 - 12:45	100	<a href="#">View Certificate</a>

9. Your certificate will be displayed and must be downloaded.



The screenshot shows a 'CERTIFICATE OF TRAINING' for David Shea. The certificate states that on March 11, 2020, David Shea, a member of the Department of the Interior, has successfully completed the course requirement for the GSA SmartPay Purchase Card Training (Account Holder/AO) - CLP1. The certificate is signed by David Shea, GSA SMARTPAY PROGRAM, OFFICE OF CHARGE CARD MANAGEMENT, FEDERAL ACQUISITION SERVICE. At the bottom, there are logos for GSA U.S. General Services Administration and GSA SmartPay®. A red banner at the very bottom contains the text: 'GSA, Federal Acquisition Service, Office of Customer Accounts and Research, Events and Training Branch (1 Hour of Training = 1 Continuous Learning Point Credit)'.

10. There is no way to automatically download the certificate, therefore, you must save the image by right-clicking on it, choosing “Save image as ...”, and saving it to your desired location on your computer.



11. You must return to DOI Talent to perform Steps 2 – 6 and complete the training.

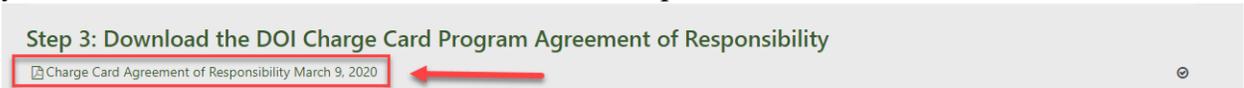
## Step 2: Download the GSA Purchase Cardholder Training PDF

1. After returning to DOI Talent, click on the “*GSA Purchase Cardholder Training*” link located in Step 2. This step is necessary for recording the completed task in DOI Talent. If you did not save a copy from the GSA Training website, you can save a copy for your records at this time.



## Step 3: Download the DOI Charge Card Program Agreement of Responsibility

1. Click on the “*Charge Card Agreement of Responsibility*” link. Read and save a copy for your records, if desired. Close the screen when completed.



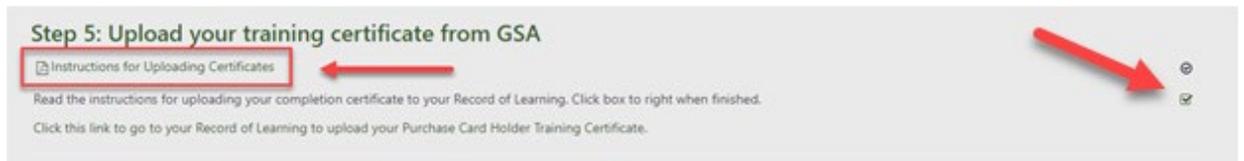
## Step 4: Download the Purchase Delegation of Authority Letter

1. Click on the “*Purchase Delegation of Authority Letter*” link. Read and save a copy for your records, if desired. Close the screen when completed.



## Step 5: Uploading your training certificate from GSA

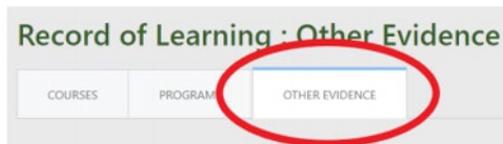
1. Click on the “Instructions for Uploading Certificates” link. This step is necessary for recording the completed task in DOI Talent. Click the box to the right when finished reading the instructions on how to upload your certificate.



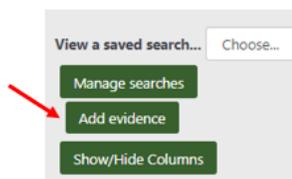
2. Start the process to upload your certification by clicking on the ‘My Learning’ tab and then on the ‘Record of Learning’ button.



3. Click on the ‘OTHER EVIDENCE’ button.



4. Click on the ‘Add evidence’ button.



5. Enter ‘Purchase Card Training for Cardholders’ as the evidence name.
6. Select ‘Certificate of Completion’ from the ‘Evidence Type’ drop-down menu.

7. Enter 'GSA' as the Provider/Vendor.
8. Enter the date of completion.
9. Click on the icon to locate your Certificate of Completion that you saved to your computer from the GSA website and select it for upload.
10. Click the 'Add evidence' button.

**Add evidence**  
There are required fields in this form marked \*

Evidence name → Purchase Card Training for Cardholders (5)

Evidence type → Certificate of Completion (6)

Description

Provider/Vendor\* → GSA (7)

Date completed\* → April 11 2020 (8)

File attachments → (9)

Maximum size for new files: 2GB

You can drag and drop files here to add them.

→ Add evidence Cancel (10)

## Step 6: Self Certify Completion/Compliance

1. After reading the bullet points, click the box to the right to certify completion of all steps within the Purchase Charge Card Training.

**Step 6: Self Certify your completion/compliance**

By checking the box to the right, I certify that I

- Visited the GSA link above and completed the Purchase Training for cardholders module;
- Reviewed the GSA Purchase Card Training PDF document provided;
- Reviewed and will comply with the DOI Charge Card Program Agreement of Responsibility.

← (1) → (2) →

2. Your Purchase Card Training for Cardholders has been completed. Once you have completed all steps, please make sure all boxes and radio buttons have been marked. This is an indication that all steps have being completed. Please see below:

Your progress 

### Step 1: Take the GSA Card Training for Purchase Cardholders

 Take the GSA Card Training for Purchase Cardholders

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- Once you've completed the training on the GSA website, close the browser window and return to this page to complete the additional steps below.
- **IMPORTANT: Be sure to download the GSA completion certificate once you've completed the training there.**
- **You will be required to take this training every 3 years as refresher training per DOI Charge Card Policy.**

### Step 2: Download the GSA Purchase/Fleet Cardholder Training PDF

 [GSA Purchase Cardholder Training](#)

### Step 3: Download the DOI Charge Card Program Agreement of Responsibility

 [Charge Card Agreement of Responsibility March 9, 2020](#)

### Step 4: Download the Purchase Delegation of Authority Letter

 [Purchase Delegation of Authority Letter March 9, 2020](#)

### Step 5: Upload your training certificate from GSA

 [Instructions for Uploading Certificates](#)

Read the instructions for uploading your completion certificate to your Record of Learning. Click box to right when finished.  
Click this link to go to your Record of Learning to upload your Purchase Card Holder Training Certificate.

### Step 6: Self Certify your completion/compliance

By checking the box to the right, I certify that I

- Visited the GSA link above and completed the Purchase Training for cardholders module;
- Reviewed the GSA Purchase Card Training PDF document provided;
- Reviewed and will comply with the DOI Charge Card Program Agreement of Responsibility.



3. Logout of DOI Talent.
4. Once you complete the training successfully, you will receive a congratulatory email from DOI Talent Admin.