# NROTC Unit Supply Binder– Tab 3-1

**SUBJECT:** Government Purchase Card Initial Process for Procurement Integrated Enterprise Environment (PIEE) and Joint Appointment Module (JAM).

**PURPOSE:** To inform NROTC Unit AOPCs of the process for initial access and registration in PIEE, JAM for US Bank.

**OVERVIEW:** As part of becoming a GPC participant, individuals are required to complete mandatory training as listed below. **Training must be complete before approving/activating PIEE/JAM roles and US Bank access.** 

#### **ACTION REQUIRED:**

#### REQUIRED TRAINING BY ROLE:

- a. Head of Activity (HA)/ Commanding Officer:
  - (1) Role Based Training HA training (once and done).
  - (2) Ethics Training annually.

#### b. Agency Program Coordinator (A/OPC - APC).

- (1) Role Based Training APC Training (every two years).
- (2) Defense Acquisition University (DAU) Course CLG001 or CLG0010, DOD Govt Purchase Card Tutorial (every two years).
- (3) DAU CLG006 Certifying Officer Training for Purchase Card Participants (once and done).
- (4) Ethics Training annually.
- (5) Unit GPC Internal Operating Procedures (IOP) /Standard Operating Procedures (SOP) Training – (every two years).
- (6) Insight on Demand Training (Once).

#### c. Approving Official (AO) / Certifying Official (CO)

- (1) Role Based Training AO Training (every two years)
- (2) DAU Course CLG001 or CLG0010 DOD Government Purchase Card Tutorial (every two years)
- (3) DAU Course CLG006 Certifying Officer Training for Purchase Card Payments (annually)
- (4) Ethics Training annually
- (5) Unit GPC Internal Operating Procedures (IOP)/ Standard Operating Procedures (SOP) Training – (every two years).
- (6) Insight on Demand Training (Once)

#### d. Cardholder (CH) – Convenience Check Holder (ConvCk Holder)

(1) Role Based Training – CH Training (every two years)

- (2) DAU Course CLG001 or CLG0010 DOD Government Purchase Card Tutorial (every two years)
- (3) Ethics Training annually
- (4) Unit GPC Internal Operating Procedures (IOP)/Standard Operating Procedures Training (every two years).
- (5) TE&PD Training Required if paying for training using an SF 182 (once and done)
- (6) DAU Course CON237 Simplified Acquisition Procedures required for Unit Ordering Officer only (sign blk 24 on DD 1155) – (once and done).

#### **TRAINING WEBSITES:**

Hierarchy levels: Some trainings require you to input HLs for certificate completion, see below.

Level 3 (00022), Level 4 (03560), Level 5 (Your Unit DoDAAC)

#### 1. ROLE BASED TRAINING (HA; APC; AO; CH):

Currently, NAVSUP is having issues with the link mentioned on below instruction. Until resolve please copy and paste link: <u>https://my.navsup.navy.mil</u> once open, look at top tabs and select "**Sites**" then under "Sites" scroll down about 4 rows and click "**Consolidated Card Program Management Division (CCPMD)**," and you should see (on the right side) "*Looking for Training? Use these direct links."* Immediately below, click on "**Purchase Card Training**" from there should take you to the training. \*Pls see screen snip below:

Screen snip shows "**Required Role Based Training** (Provides a Certificate)" and "**External Training Links**" also, other training requirements are listed. Let us know if you have issues getting to this page.

Oveniew		
Training	TRAINING	
Admin Notices Policies Desk Guides Bank Guidance Audits and Metrics	DON Government Purchase Card (GPC) Training Training Requirements Training is available in a narrated audio or printable PDF format. Download times vary by file size and connection speed. If you need assistance, please contact don_ccpmd_training@us navy.mil Required Role Based Training (Provides a Certificate) PLEASE NOTE - The audio version for CH, A/OPC, and A/BO is currently being updated and unavailable at this time. Please use the PDF version for you training needs. Head of Activity (HA) - Audio or PDF Cardholder (CH) - PDF	External Training Links  Defense Acquisition University (DAU) CLG0010 and CLG0 GSA Purchase Card web based training My Navy Portal Annual Ethics Training DAU CLG 0010 and CLG 006 Training OCONUS/deployed personnel who cannot access DAU CLG 00 training can download the training slides below. Because you a training online you will not be able to access the required test from DAL. Your /AOPC or Supervisor should make a note in yo that you completed the requirement by reviewing the training certificate, the course test MUST be taken online when there is connectivity. If you need assistance, contact don, cerpnd, trainingB
	Approving/Silling Official (A/BO) - PDF  Knowledge Nuggets     PCKN 5 How Does Forced Authorization Work - PDF	CLG006 - Certifying Officer Legislation Training for Purch     CLG0010 - Governmentwide Commercial Purchase Card
	<ul> <li>PCKN 9 Policy Guidance for the GPC - PDF</li> <li>PCKN 9 GPC Terms &amp; Conditions - PDF</li> <li>PCKN 14 Convenience Checks &amp; 1099 PRO - PDF</li> <li>PCKN 15 Training Education &amp; Professional Development - PDF</li> <li>PCKN 15 GPC Internal Operating Procedures - PDF</li> <li>PCKN 13 GPC Overseas (CCONUS) Shipments - PDF</li> <li>PCKN 20 Split Purchases - PDF</li> </ul>	Regional Training • No regional training scheduled at this time. RESTRICTED CCPMD Database Access (This is NOT trainin A/OPCs, Approving Officials, Commanding Officers, or Superv retrieve certificates from the CCPMD training database, may s using this link. The first time you access the database you will register as an authorized user, https://mv.navuup.navy.mi/apps/cosStraining.CCPMD_V Questions? Contact DON CCPMD Hej Desk

If above is successful, skip to number (2) below for continued guidance. Or, see below if you are having CAC issues.

- a. Register your CAC by clicking on <a href="https://my.navsup.navy.mil/webcenter/portal/ccpmd">https://my.navsup.navy.mil/webcenter/portal/ccpmd</a>
  - (1) Under Access to CCPMD's Secure Website...." CLICK "Register your CAC/PKI, (2) Then CLICK "Continue."
  - (2) Then CLICK "Continue."
  - (3) Input your User Type "Civil Service Employee" or "Military." Then enter the registration information and CLICK "Next." Enter Organization Information, "USN, Duty Position, Grade/Rank and DODACC (N-than unit UIC), then CLICK "NEXT."
  - (4) Verify information then click "Finished."
- b. Once your CAC is registered, Access your training at https://my.navsup.navy.mil/webcenter/portal/ccpmd\_pc/Training
  - (1) Under "**GPC Required Training**" click on the screen icon next to your role (HA, APC, AO, CH)
  - (2) Review the module's then click on Certification Test and Registration (hierarchy levels noted above).
  - (3) Any difficulties contact the CCPMD Help Desk at <u>DON\_CCPMD\_Training@navy.mil</u> or 717-605-3065.
- b. Tips if you have difficulty accessing the site at NROTC units:
  - (1) Load your certificates from you CAC card to your university computer (may let you get through the firewall to the point where you can sign in with your CAC and pin.
  - (2) Go to <a href="https://militarycac.com/window8.htm#window\_RT">https://militarycac.com/window8.htm#window\_RT</a> (for Windows 10 computers)
    - a. Download and save the two files on the university computer. Open up your "Downloads" page from files or if they are on your desktop, go there. Right click on the two cert files and install.
    - b. You may have to close out and restart your internet browser. For some NMCI websites, you will receive a warning go to the "Advance" button, and click proceed to website.

# 2. <u>DAU COURSE'S (CLG006, CLG0010, CON237) – USE GOOGLE CHROME or</u> <u>MICROSOFT EDGE</u>

- **a.** New Students (never accessed DAU site or accessed prior to Sep 2016) Request access to the virtual campus.
  - Complete a DAU SAAR user Google Chrome or Microsoft Edge go to <u>https://saar.dau.edu</u> and follow the guidance provided. At the bottom, click "I Agree" type in the code then select "Submit" once the form is complete.

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DoD Common Access Card (CAC) ASSOCIATION		
**INPORTANT - PLEASE READ** The RECUIRED harves to submit this form is Google Chrome or Microsoft Edge		
Do you support the Department of Defense and have a Common Access Card (CAC)?		
Do you know your DAUID?		
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Please select a system for which you are requesting access Virtual campus (Online Training)		
Reason you are requesting an account		
Required Training		
PERSONAL DETAILS [EDIPI : 1017218324 ]		
Foreign National students without a DoD CAC or DAUID can visit the F <u>AQ websits</u> for guidance on establishing an account. DAU account holders must also update their profile in the DAU Identity Management System. Further guidance is provided after submitting this form.		
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(2) Your request for access could take up to 24 hours.



You should receive multiple emails with your (username, password and access granted. If you do not receive a response contact the DAU Helpdesk at <u>dauhelp@dau.edu</u> phone: 866-568-6924, # then Opt 1.

- b. Returning Students (already registers on the DAU site since September 2016):
  - (1) Login to the Virtual Campus at <a href="https://dau.csod.com/">https://dau.csod.com/</a>
  - (2) Click "I accept" then "Log in using your Smartcard"
  - (3) Locate the "Search" box in the upper right corner of the page.
  - (4) Type in the specific course Prefix and Number (i.e. CLG 0010 (previously CLG 001); CLG 006; CON 237) ensure you put a space between the course prefix and number. Then "open curriculum".
  - (5) Next to the title click on "Options" then "View Training Details."
  - (6) Select "Launch" to begin the course, then the course exam.

**3. UNIT GPC IOP/SOP TRAINING.** Training in your units GPC Instruction, this must be documented (i.e., sign-in sheet or Memorandum for Record).

- 4. ANNUAL ETHICS TRAINING. Must be documented
  - a. To complete within TWMS, click on https://twms.dc3n.navy.mil/my.policy
  - b. Then click on the YELLOW highlighted "Click Here for Self-Service/myTWMS" then "Continue"
  - c. Under "Tools and Actions" go to "On Line Training and Notices, then "Online TWMS"
  - **d**. In the Search Box (far right) type in ETHICS, you should see a number of course to choose from.

**5. TE&PD TRAINING.** CH who use the GPC to pay for training using an SF 182, must complete TE&PD training prior to paying with their GPC. Please see below link for required TE&PD training, this will get you trained to pay for training using SF182s and there is a cert at the end of the training.

https://my.navsup.navy.mil/webcenter/portal/ccpmd? adf.ctrl-state=w0ab1aslz 1

Look under: Looking for Training? Use these direct links. and click

• Purchase Card Training (PC)

• Under: Knowledge Nuggets, look for PCKN 15 Training Education & Professional Development - PDF (click the PDF link). Lastly, complete the training and follow the ending instructions to get the certificate.

#### For training questions contact Mr. Sidney Coleman - NSTC Level IV and V APC - 847-688-4141 x187 - email: <u>sidney.e.coleman.civ@us.navy.mil</u>

\*\*See below and next pages for AOPC PIEE guidance, including GPC participant nomination and appointment process.

#### PIEE Registration Guidance for your GPC Role A/OPCs / AO-COs/ CH/ConvCk Holders (for those that do not have PIEE access)

As part of the transition to US Bank Access Online, all program participants (A/OPCs, AO-COs, CH/ConvCk Holders) are required to gain access to the Procurement Integrated Enterprise Environment (PIEE) site <u>https://piee.eb.mil/</u> for their GPC role. Once you are approved for access in your role you will automatically have visibility of the US Bank Access Online Site and the GPC's Joint Appointment Module to complete the mandatory Single Sign On (SSO) process.

AOPC must first request PIEE access for their role. Once PIEE access is received, initiate the AOPC Letter of Delegation from the PIEE site (using the guidance below).

Once the AOPCs Letter of Delegation is completed, you may have to initiate your units Approving Official/Certifying Officials (AO-Cos) and Cardholder/Convenience Check Holders (CH/ConvCk) Letters of Delegation from within the JAM site. If the unit AO-CO or CH/ConvCk holder is already active in US Bank via PIEE, no need to re-create their letters. If the AO-CO or CH/ConvCk holder does not have access to PIEE, the AOPC will need to use this guidance to request PIEE access for their role.

#### **KEY NOTES:**

1. Make every effort to complete the entire process (PIEE access and JAM Letter of Delegation) within 30 days to avoid role archiving and the need to reactive the role. If the nomination exceeds 6 days, the role could expire and require you to begin the process again.

See below for PIEE – JAM – AOPC Guidance.

#### <u>PIEE – JAM - AOPC – Initiating their Letter of Delegation</u> <u>And</u> <u>AO/BO and Certifying Officer (AO) and CH/ConvCk Letters of Delegation</u> <u>As of: 28Apr23</u>

1. AOPC, once you are approved for access to PIEE you need to initiate your AOPC Letter of Delegation.

2. Select "My Account" then under Role, select "Add Additional Role."

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- 3. Review your profile and supervisor data.
- 4. Complete the following:
  - --under Step 1 select "PC- Purchase Card
  - --under Step 2 select "A/OPC
  - --under Step 3 select "Add Role".



5. Under Step 4, you should see your role A/OPC under Location Type, under Location Code Type ensure "DODAAC" is selected. Then under Location Code enter <u>your</u> unit's DODAAC which is your unit's UIC with an N in front of it.

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Add Roles	Roles		User ID: EDIP11017218324
1. Profile	Info: Enter the DoDAAC for the location where you are performing your duties. This	s may or may not be the same as your home organizational DoDAAC.	×
2. Supervisor / Agency			
3 Poles St	Step 1. Select the appropriate Application from the list below	Step 2. Select One or More Roles from the list below (Ctri+Click)	Step 3. Click 'Add Roles'
3. Roles O	PC - Purchase Card	User Roles for PC Agency/Organization Program Coordinator (A/OPC)	Add Roles
4. Justification	To By selecting the Purchase Card Functional Capability, and a role in step 2, you will be granted access to the applicable purchase card applications. These	Approving/Billing Official (A/BO) Cardholder (CH)	
5. Summary	will be displayed in Step 4 below.	Certifying Officer Component Program Manager (CPM)	×
6 Agreement			
	Step 4. Fill out the required information for the applicable applications		
	Roles Summary		
	Application	1↑ Location Code Type 1↑ Location Code *	Extension
	PC   JAM   PBIS   BANKS Agency/Organization Program Coordinator (A/OF	PC) DoDAAC V N00210 X	N/A Delete
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If you need access to more than one UIC click ADD ROLES, then add the second UIC. Then select NEXT.

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Agency	Step 1. Select the approp	riate Application from the	Step 2. Select One or More Roles from the lis	st below
3. Roles ூ	list delow		(Ctri+Click)	Step 3. Click Add Roles
4 Justification	PC - Purchase Card	~	User Roles for PC	+ Add Roles
5. Summary	TTP By selecting the Pur Capability, and a role in s	chase Card Functional step 2, you will be granted purchase card applications	Agency/Organization Program Coordinator Approving/Billing Official (A/BO) Cardholder (CH) Certifying Officer	· · · · · · · · · · · · · · · · · · ·
6. Agreement	These will be displayed in	n Step 4 below.	Data Mining Reviewer	
	Step 4. Fill out the require	ed information for the applica	able applications	
	Roles Summary			
	Application	Role	↓ Location Code ↓↑ Type Location Cod	It It It It e * Extension Group Action
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6. Add and attach your required APC training certificates. If the training is not listed select "Other" and add that training:

- a. APC Role Training (every 2 years).
- b. DAU CLG001 or CLG0010 (every 2 years).
- c. DAU CLG006 (APCs initial only).
- d. Ethics (every year).
- e. IOP (every 2 years).
- f. IOD (once and done).

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7. You will get an option to review all the training you attached. Click NEXT and select the CAC certificate you will use for the site then submit.

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dd Roles	Training							User ID: EDIPH017218324
Profile	Course Name	Completion	Certificate	Frequency	Due Date	Hours Provider	Source	Action
Supervisor / Agency	OTHER - Ethics Training	2019/09/27	Kleinschmidt - Ethics.pdf	1 Year	2020/09/26	1 TWM	Manual	Edit Delete View
Roles	OTHER - A/OPC Certification Course	2019/02/06	Kleinschmidt - APC training.pdf	2 Years	2021/02/05	4 DON COPMD	Manual	Edit Delete View
Training 🗘	OTHER - Insight on Demand	2018/12/12	IoD Training 12Dec18- Kleinschmidt.pdf	Initial		1 Oversight System	Manual	Edit Delete View
Justification	CLG006 - Certifying Officer Legislation Training for Purchase Card Payments	2018/10/26		1 Year	2019/10/26		MIGRATION	Edit
Summary	OTHER - Internal Operating Procedures Training	2018/03/22	Kleinschmidt - IOP.pdf	2 Years	2020/03/21	1 NSTC	Manual	Edit Delete View
Agreement	OTHER - DAU CLG 001 - BOD Government Purchase Card Tutorial	2004/10/28	Kleinschmidt - CLG 001.pdf	Initial		4 DAU	Manual	Edit Delete View
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8. You will receive an email with subject: JAM (your UIC) Appointment Required for (A/OPC).

You will need to initiate your Letter of Delegation in the system and forward the letter to your HA for signature. Open the website (token) noted in the email or copy and past the link into your browser (ensure you take out the no click).

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You can initiate your Agency/Organization Program Coordinator Appointment workflow process within the Procurement Integrated Enterprise Environment (PIEE) by following these steps:	
Step 1: Deen the approx/Department information appointment in Just by cluster this https://www.db.ml/just/dean/manilachib.html/man	
NOTE: This email service is outbound only. We are unable to receive and process replies to this mailbox.	
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9. Select the delegating authority your APC position will have, see my example below. I recommend all A/OPC have the following Authorities when registering:

-Delegation Authority – Yes

-Approving/Billing Official Appointment Letters – Yes

-Cardholder Delegation of Authority Letters – Yes

-GPC Micro-Purchase Cardholder – Yes

-DOD GPC Micro-Purchase Convenience Check Writer – Yes if your unit has a ConvCk

-DOD GPC Micro-Purchase Emergency Type Operations Cardholder and/or Check writer - NO

-DOD GPC Micro-Purchase Higher Education Cardholder - No

-DOD GPC Warranted Overseas Emergency Type Operations Cardholder – NO

-DOD GPC Contract Ordering Official – NROTCU Cardholders YES

-DOD GPC Overseas Simplified Acquisition Cardholder – No

-DOD GPC Contract Payment Official Cardholder – Yes

-DOD GPC Misc. Payments Official Cardholder (SF-182 Training Payments) – Yes -DOD GPC Inter/Intra-Government Payment Official Cardholder – Yes

**<u>NOTE:</u>** Procurement DODAAC: Should be N00189 (which is your contracting site). DOD Organization: <u>Your</u> unit's UIC with a "N" in front.

Procurement DoDAAC 🚯									
N00189									
Delegation Authority		Approving/Billin	g Official Appointment Letters		Cardhol	der Dele	gation of Autho	ority Letters	
YES		YES		YES					
GPC Micro-Purchase Cardho	older	DoD GPC Micro-	Purchase Convenience Check Writ	DoD GPC Micro-Purchase Emergency-Type					
YES		YES			Operations Cardholder and/or Check Writer				
					NO				
DoD GPC Micro-Purchase Higher Education Cardholder		DoD GPC Warra Operations Card	DoD GPC Warranted Overseas Emergency-Type Operations Cardholder				DoD GPC Contract Ordering Official Cardholder		
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10. Review your information to ensure it is correct:

**DELEGATING/APPOINTING AUTHORITY**: This should be your CO/HA, who may not be registered within PIEE so you would need to select the button under the names that appear "Select External Delegating/Appointing Signatory"

st Name		L	ast Name		Work Pl	one Nur	nber		Work Email Address		
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egating/Ap	pointing Signatory										<b>O</b> He
ase select t listed belov egating/Apj	the individual(s) (primary and w, click the "Select External D pointing Signatory Selection(s	alternate Delegating/Appointing elegating/Appointing Signatory s)" when finished.	Signatories (DASs)) who are authorize button to identify the appropriate prima	ed to approve this ary DAS by enter	s appointment / delegatic ing his/her email address	n of auth . You ma	ority. You must identify at least one D/ ay then select up to two additional indiv	AS. The first period and the second secon	son you identify will be the primary D list below to serve as alternate DASs	AS. If the desired . Click the "Compl	primary DAS lete
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em	Name 🗈	DoD Component	DoD Group Name	11	Work Phone Number	11	Work Email Address	IT PIEE R	ble	11	Action
	BURNETT, SARAH	Department of the Navy	Chief of Naval Personnel (BUPERS)	N00022	850-452-3996		SARAH.W.BURNETT@NAVY.MIL	Oversig	nt Agency/Organization Program Coo	rdinator	Select
	Swanson, Christopher	Department of the Navy	Chief of Naval Personnel (BUPERS)	N00022	850-452-8957		chris.swanson@navy.mil	GPC De	legating/Appointing Authority		Select
Select Exter	email Delegating/Appointing Signab	ory .									
Designatio	on Name	DoD Component	DoD Organization	DoD Organiza	ation Name		Work Phone Number	Work Ema	II Address PIEE P	Role	Action
Primary											
Complete	e Delegating/Appointing Signatory	Selection(s)									

11. Type in your CO/HA's name and email address then select "Continue".

Jerry			Last Name Long			84	K Phone Nu 7-688-4141	mber		jerry.e.long@navy.mil		
		External Delegating/Appointin	g Signatory									
Delegating/Ap	pointing Signatory	First Name *		Last Name *		Wor	k Email Add	iress "				O Help
ERROR: A Pr	imary Delegating/App	Michael		Riley		m	chael.b.riley(	@navy.mil ×				
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Item	Name	L DoD Component	DoD Group M	lame	lt w	Work Phone Num	ber II	Work Email Address	IT PIEE R	ble		It Action
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2	Swanson, Christo	oher Department of the Nar	y Chief of Nava	I Personnel (BUPERS) I	N00022 85	150-452-8957		chris.swanson@navy.mil	GPC De	legating/Appointing Authorit	Y	Select
Showing 1 to C Select Ext Designated	2 of 2 items email Delegating/Appoint Delegating/Appointin	ing Signatory 1g Signatory									Prev	ious 1 Next
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,												
Complet		Signatory Selection(s)										

12. You will get a message that states "The email address Is not associated with an active PIEE account.

Are you sure you want to continue?" Select "Continue".

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13. The next screen will how that your CO/HA's name and email address was added under the Delegating/Approving Signatory. Select "Submit".

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15. A screen will appear with your AOPC Delegation of Procurement Authority and Appointment. Select "I concur with the Appointment Certification".



17. Add a comment in the Confirmation screen and select "Submit."

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19. A screen will appear asking you to sign your Appointment. Click on "Sign".

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21. You will get a notification that your appointment has been submitted.

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Agency/Organization Program Coordinal	tor Appointment - Pending Supervisor Approval			
INFO: Appointment has been submitted.	Email notification has been sent to the Appointee	Supervisor.		
Appointee				<li>Help</li>
First Name	Last Name	Work Phone Number	Work Email Address	
Elisabeth	Kleinschmidt	847-688-5855	beth.kleinschmidt@navy.	.mil
DoD Component	DoD Organization	DoD Organization Name	PIEE Role	
Department of the Navy	N3560A	NAVAL AIR STATION	Agency/Organization Pro	gram Coordin
Procurement DoDAAC				
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23. An email will be sent to your Supervisor with a link to access PIEE and approve your appointment (example of the email sent to my supervisor below). Next, an email will be

forwarded to your Delegating/Appointing Signatory, your CO/HA, who will also receive an email **with a link** to access PIEE to approve / sign your letter of delegation. Example below:

From: piee.noreply@mail.mil <piee.noreply@mail.mil> Sent: Wednesday, August 26, 2020 9:16 AM To: Long, Jerry E CIV USN NSTC GREAT LAKES IL (USA) <jerry.e.long@navy.mil> Subject: Supervisor Approval Required for Agency/Organization Program Coordinator Appointment - IMMEDIATE ACTION REQUIRED

Jerry Long your immediate action is required.

You have been designated as the Appointee Supervisor for the following appointment in the Joint Appointment Module (JAM):

Appointment: Agency/Organization Program Coordinator Appointment Component: Department of the Navy Location DoDAAC: N00210 - NAVAL SERVICE TRAINING COMMAND Appointee Name: Elisabeth Kleinschmidt

You can process this appointment within the Procurement Integrated Enterprise Environment (PIEE) by following these steps...

25. Once your Delegating/Appointing Signatory, CO/HA signs your letter the approval will go to the NSTC GAM for review and approval. Once they approve you should receive an email noting your appointment is approved. Once your appointment is approved you can go into the site and pull your signed letter. Go into PIEE then click on JAM.



26. Under "My Appointment" select "Search for GPC appointments where I am designated as the Appointee."



27. You should see you're A/OPC appointment, on the far right click the "Select" button. Then scroll down to the bottom of the screen and select "View Appointment Letter."

opointment Wor	kflow				<ul> <li>Hei</li> </ul>
Date	Action	Status	Name	Signature	PIEE Role
2020/08/26 14:10:00	Submit	Pending Supervisor Approval	Elisabeth Kleinschmidt	KLEINSCHMIDT.ELISABETH.1017218324	Agency/Organization Program Coordinator
2020/08/26 14:21:17	Approve	Pending Delegating/Appointing Signatory Approval	Jerry Long	Long.Jerry	Appointee Supervisor
2020/08/26 15:36:38	Approve	Active	Michael Riley	Riley.Michael	External DAS
2020/08/26 15:37:16	Extracted	Active	Michael Riley	Riley.Michael	External DAS

28. You're A/OPC Appointment Letter should open, save and/or print for your files.



# NOTES:

- 1. ARCHIVED:
  - a. If your role is "Archived" complete the following:
    - -- log into PIEE, select "Manage Roles"
    - -- select the "Archived" role that requires reactivation (check box)
    - -- select "Request Activation," verify profile, supervisor/agency information/ roles, iustification/attachments.
    - -- a success page should be displayed when complete
    - -- your supervisor will receive an email with a link to approve.

-- once the nomination is accepted the AOPC should be able to immediately go into JAM and verify that the record is there and continue in the normal JAM appointment process (using attached guide).

- 2. INACTIVE STATUS:
  - a. If you do not have an active appointment in JAM The GAM will need to Archive your role to restart the appointment process otherwise, you will not be able to request activation. Once your status is in Archived follow the steps above in number 1.
  - b. Inactive Status and the user has an active appointment in JAM.
    - (1) The GAM will need to activate your user role, by changing the status to Activate and click Update.
    - (2) Your Supervisor will receive an "approve access" email. Once the supervisor approves your access will be active.

YOU CAN NOW INITIATE YOUR AO/CO AND CH LETTERS OF DELEGATION, SEE BELOW FOR GUIDANCE.

### <u>PIEE JAM – AOPC INITIATING THEIR AO/BO, CERTIFYING OFFICER (AO) AND CH-CONVCK HOLDER</u> <u>LETTERS</u>

**Key points to remember**: AOPC initiates all their program participant's letters of delegation and AO DD Form 577.

- -- DODAAC your units UIC (with N in front)
- -- Delegating/Appointing Authority should be the AOPC for everyone except the CO Appt
- -- Delegating/Appointing Authority for the CO DD form 577 should be your CO/HA by selecting the EXTERNAL DELEGATING AUTHORITY button under the names that appear as default
- -- Oversight AOPC -- is Mr. Sidney Coleman, sidney.e.coleman.civ@us.navy.mil

1. Log into PIEE and selection "**GPC Nominations**" then "**Create Nomination**". Ensure your role "Agency/Organization Program Coordinator" is noted under Nominator Role then under "Nominee Email" add either your AO-COs or CHs email address. Then select "NEXT".

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Agency/Organization Program	m coordinator (A/OPC) - HQ	NAVAL SERVICE IR	AINING COMMAND NSTC -	N 🗢		
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2. If the Nominee (AO-CO/CH-ConvCk holder) is registered within PIEE their information will populate. Update the "Nominee Role" based on the individual's duty (A/BO-Certifying Officer-Cardholder). If you are nominating your AO-CO start with their A/BO role first, the system should ask you if that individual is also a Certifying Officer to complete their DD Form 577.

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JAM - Google Chrome								< 🗆	$\times$
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Joint Appointment Module	Create Appointment -	Search Appointments -	My Appointments -	COR Information	My Training	Warrants <del>-</del>	Exit	Logou	ut ^
	Agency/Organization P Approving/Billing Officia	rogram Coordinator Appoint al Appointment	tment			User :	Beth Kleinschmidt	тс 8:31 UTC	
Warning : You must complete you SPM/JAM Documents	Certifying Officer Appoi Both A/BO & Certifying	ntment Officer Appointments							
OFP: Training Links     Units: JAM and SPM Pall     Policy: COR, JAM, and SI     Technical: Non-Repudiati     Technical: PIEE Browser:     Training: JAM ter CORs     Training: JAM ter CORs     Training: JAM ter CORs     Training: JAM ter CORs     Training: SPM     Training: SPM for CORs     User: Active Department/     User: ECP and Release S     User: SPA for Releases     User: User Code     Workflow: COR Appointme     Workflow: COR Appointme     Mtpe//ac.pise.db.ml/am/dim/Jam/Himm	Overlight Agency/Orge or and Resources PM Links and CASC PAGe and CASC PAGe and CAC	nization Program Coordinat						Ţ	
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3. Ensure the "Nominee Location Type Code" notes DODAAC then add your units UIC in the Nominee Locate Code area, with a N in front of the UIC. Then review and add any of your Nominees required training.

- a. Role Training (AO & CH every 2 years)
- b. DAU CLG0010 (APC, AO & CH every 2 years)
- c. DAU CLG006 (AO every year, APC initial only)
- d. Ethics (AO & CH every year)
- e. IOP (AO & CH every 2 years)
- f. IOD (AO once and done)

randolph.chaney@navy.mil	1	Randolph				Cł	naney			í	
me Organization DoDAAC *	Nominee Role *		N	ominee Loca	tion Type Co	ode *		Nominee Loc	ation Code *		
N0580A	Cardholder (CH	1)	<b>~</b>	DoDAAC			~	N03560		×	
Course Name		Completion Date	Certificat	e Frequency	Due Date	Hours	Provider		Source	Action	
CLG001 - DoD Government Commercial Overview	Purchase Card	2021/05/11	20. anout	2 Years	2023/05/11		Defense J University	Acquisition	DAU		
CLG006 - Certifying Officer Legislation Tr Card Payments	aining for Purchase	2020/01/14		1 Year	2021/01/13		Defense J University	Acquisition y	DAU		
CLG004 - DoD Government Purchase Ca Training	ard Refresher	2013/08/06		2 Years	2015/08/06				MIGRATION		
CLG004 - DoD Government Purchase Ca Training	rd Refresher	2013/08/06		2 Years	2015/08/06				MIGRATION		

4. Once everything is added, selection the Submit button.

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https://cac.piee.eb.mil/xhtml/auth/user/nominati	ion/RoleNominatio	nReview.xhtml				- ≜ C	Searc	:h		Ĥ☆ €
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Agency/Organization Program Coordinator (A/OPC) - HQ NAVAL	SERVICE TRAINING	COMMAND GREAT	LAKES PENSACOLA PRO	OGRAM - N3560A		<b>~</b>				
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ome Organization DoDAAC *	Nominee Role *			Nominee Locatio	on Type Code	•		Nominee Location	Code "	
N0580A	Cardholder (CH)		~	DoDAAC				✓ N03560		
Training										
Course Name		Completion Date	Certificate		Frequency	Due Date	Hours	Provider	Source	Action
OTHER - IOP-SOP Training		2021/05/20	Chaney - NSTC IOP trai	n 20May21.pdf	2 Years	2023/05/20	2	NSTC	Manual	Archive View
OTHER - TE&PD SF 182 Training		2021/05/19	Chaney -TE&PD- 19May	21.pdf	Initial		3	DON	Manual	Archive View
CLG001 - DoD Government Commercial Purchase Card Overview	"	2021/05/11			2 Years	2023/05/11		Defense Acquisition University	DAU	
OTHER - Cardholder Role Training		2021/05/11	Chaney - CH Train 0 11	May 21.pdf	2 Years	2023/05/11	8	DON CCPMD	Manual	Archive View
OTHER - Ethics		2021/05/11	Chaney - Ethics 11May2	1.pdf	1 Year	2022/05/11	2	TWMS	Manual	Archive View
CLG006 - Certifying Officer Legislation Training for Purchase Care	d Payments	2020/01/14			1 Year	2021/01/13		Defense Acquisition University	DAU	
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5. A screen should pop up notifying you that an email was forwarded to the nominee you just initiated a letter for. My example below shows I just nominated a CH, he will receive an email with guidance.



6. Once your nominee completes their requirements, notification will go to their supervisor for action. Once their supervisor completes their part an email will be sent to both the nominee and to you the AOPC. Below is an example of the email you the AOPC will receive for the nomination you initiated, my example is for the CH nomination I initiated.

The AOPC can now go into the PIEE JAM site to initiate your nominees Letter of Delegation (AO-CO or CH/ConvCk Holder).

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File Message Q Tell me what you want to do			
Reply     Reply			~
disa.ogden.eis.mbx.wawfnoreply@mail.mil Populonum, Denne M CIV USN NSTC GREAT LAKES II. (USA); Kleinschmidt, Elisabeth (Beth) CIV USN NSTC GREAT LAKES II. (USA) - JAM Appointment Required for Cardholder (CH) Role Signet By plexebmil			8:48 AM
Donna Populorum,			
This email is for informational purposes only and you have no action at this time.			
Elisabeth Kleinschmidt,			
You nominated Donna Populorum for the Cardholder (CH) role. This role requires an active Cardholder Appointment in the Joint Appointment Module (JAM) before the role can be activate Administrator (GAM).	d by a G	roup	
You can initiate the Cardholder Appointment workflow process within the Procurement Integrated Enterprise Environment (PIEE) by following these steps:			
1: Login to the Procurement Integrated Enterprise Environment (PIEE) application. https://no-click.mil/?https://piee.eb.mil			
2: Open the Joint Appointment Module (JAM) by clicking the 'JAM' icon.			
3: From the 'Create Appointment' menu, select the 'Cardholder Appointment' option.			
4: Select the role you wish to use to initiate the appointment.			
5: Select the appointee from the list of available individuals.			*
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7. Log into PIEE then JAM. Then select "**Create Appointment**" then "Approving/Billing Officer or **Cardhol**der Appointment". My example below is for Cardholder Appointment.



8. Select your role A/OPC.

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9. Your Approving/Billing Official or Cardholders information should populate, select that individual.

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10. Review your Cardholders appointee information and make corrections if needed. In the field titled "Existing Warranted Contracting Officer (Non-GPC)" select "No".

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First Name	Last Name		Work Phone Nu	umber			Work Email Address				
Randolph	Chaney		8476885454	8476885454				randolph.chaney@navy.mil			
DoD Component	DoD Organizati	on	DoD Organizati	DoD Organization Name				PIEE Role			
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11. Then review their training and add any required training.

12. For a Cardholder Appointment you must add Special Designations to their Letter of Delegation. Select "Add Special Designation."

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13. A new screen will appear. Add "Micro-Purchase Cardholder" role and note the single and cycle limits (current micro-purchase threshold is \$10,000) with today's date. Then select "Add".

Course Name	Add Special Designation				Archive	View	
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OTHER - Cardhol					Archive	View	
Training	Single Purchase Limit *	Cycle Limit *	Effective D	ate *			
OTHER - Ethics	\$10,000	\$10,000	2021/01/2	9	Archive	View	
CLG0010 - DoD	Agency Specific Policy and	Procedure			Archive	View	
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OTHER . TE&PD	🖉 Cancel 🗹 Add	Help			Archive	View	
OTHER - TEAPD					Archive	View	

14. Select Special Designation and add the following roles for your Cardholder.

"Micro-Purchase Cardholder" - \$10,000 and/or "Micro-Purchase Convenience Check Holder" - \$5,000.

"Contract Payment Official Cardholder" - \$25,000.

"Misc Payment Ordering Officer (SF 182)" - \$24,999.

"Inter/Intra Government Payment Official Cardholder" - \$9,999.

All special designations should be added to the screen (see below).

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15. Scroll down to the bottom of the screen to the Direct Oversight Agency/Organization Program Field lookup search for sidney.e.coleman.civ@us.navy.mil and select LOOKUP. His information should be added then click SELECT.

In addition, the Appointee's Supervisor information should populate, select "Next."

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16. Review all areas "Initiator", "Appointee", "Direct/Oversight Agency Coordinator" "Supervisor" and "Delegating Appointing Signature." The unit's A/OPC should be listed as the Delegating/ Appointing Signature for CH and AO roles. For the Certifying Officer (CO) role Delegating/Appointing Signature should be the unit's HA / Commanding Officer. (In most cases, you will have to use the external link to insert your HA's information –HAs will receive an e-mail from PIEE to approve the role). Then select "SUBMIT" at the bottom of the page.

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Beth	Kleinschmidt	847-688-5855	beth.kleinschmidt@navy.mil
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Oversight Agency/Organization Program Coordinator	HQ NAVAL SERVICE TRAINING COMMAND GREAT LAKES P		
Annointee Supervisor			0.00
First Name	Last Name	Work Phone Number	Work Email Address
Timothy	Daseler	850-452-9483	timothy.daseler@navy.mil
Delegating/Appointing Signatory			O Hel
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17. The appointment should pop up. Select "I concur with the Appointment Certification."

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First Name Donna DoD Component	References: a. Department of Defense (DoD) Gove and Managing Purchase, Travel, an b. Office of Management and Pudget /	ernment Charge Card Guid d Fuel Card Programs	ebook for Establish	ing	s ⊉nav;	/.mil		
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18. A confirmation page should pop up, select "Submit."

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19. Sign appointment page should pop up, select "Sign."

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Appointee					😗 Help	
First Name	Last Na	me	Work Phone Number	Work Ema	il Address	
Donna	Popule	orum	847-688-4141	donna.pc	pulorum@navy.mil	
DeD Company	DoD Or	rapization	DoD Organization Nam	PIEE Pole		

20. You will see a notification screen that states the appointment was submitted to the appointee's supervisor.

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ardholder Appointment - Pending Supervis	or Approval		
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Initiator	air notification has been sent to the Appoin	tee Supervisor.	S Help
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PIEE Role	DoD Group Name	DoD Organization	DoD Organization Name
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First Name	Last Name	Work Phone Number	Work Email Address
Donna	Populorum	847-688-4141	donna.populorum@navy.mil
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21. The CHs supervisor should receive an email similar to the below using the link provided in the email to go into PIEE, authenticate his CAC and sign the designation.



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22. A notification will be sent to the Cardholder with a link and guidance to sign the designation. Make sure when they copy the link they do not copy the https://no-click.mil?/ (if displayed)

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Signed By donna.populorum@navy.mil						۶ 🗸
Appointment: Cardholder Appointment Component: DEPT OF THE NAVY Location DaDAAC: N35GA- NAVAL AR STATI Status: Pending Appointee Approval Your immediate action is required to review a can sign this appointment within the Procure Environment (PIEE) by following these steps.	DN nd sign this appointment. You nent Integrated Enterprise					•
<ol> <li>Open the Cardholder Appointment by click https://no-clinee.eb.mil/pathy.i/lise.eb.mil/pathy.i</li></ol>	ng this link: coken?emailedonna.populorum9440 fec317dd568da19775c7803f7ebe31ed curacy then Approve or Reject will initiate the digital active. If rejected, the rr:	-58c47		Tho GRE Re: N Goo new OF N	rnbloom, Scott A CIV USN NS EAT LAKES IL (USA) NSTC. News Clips February 03, J d Day, please find attached CH s clips and NSTC news clips bei NOTE IN CHINFO CLIPS:	<b>TC</b> 2021 IINFO tow.
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23. Once Cardholder completes their actions it will go to the NSTC GAM (Ms. Melanie Armstrong) to complete the approval and activation. You will receive an email notification that the appointment is approved. The AOPC should go back into JAM to print the Letter of Delegation for the CHs and/or AO/BO file.

#### LOCATING PARTICIPANTS (AOPC/AO-CO/CH-CONVCK) LETTER OF DELEGATION FOR YOUR FILES

1. To locate your participants Letter of Delegation (AO-CO and CH/ConvCk), go into JAM, at the top select "Search Appointment" then "Search as A/OPC".

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Joi	nt Appointn	nent Module	Create Appointment <del>-</del>	Search Appointments -	My Appointments <del>-</del>	COR Information	My Training	Warrants <del>-</del>	Exit		^
				Search as Agency/Orga	nization Program Coordi	nator			User : Be	th Kleinsch	midt
				Search as Contracting C	Office Representative						
w	arning:You	nust complete vo	ur COR Information prior to	Search as Oversight Age	ency/Organization Progr	am Coordinator					
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2. Type in your participant's last name and select "Search."

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Joint Appointment Module Create Appo	intment+ Search Appointments+	My Appointments - COR Information	My Training Warrants <del>-</del>	Exit User : Beth Kleinschmidt
Search Appointments as Agency/Organization Search For *	Program Coordinator DoD Organization	Appointment	Status	
My Users and Organization 🗸	- Select -	✓ - Select -	- Select -	~
Appointee Last Name	Delegating/Appointing Signatory La	st Status Date (YYYY/MM/DD)	Limit Results to	Latest Appointments
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3. Locate your participant (AOPC/AO-CO/CH-ConvCK) and click "Select" under Action.

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ltem	DoD Org 📙	DoD Org/Group Name ↓↑	Appointment 🎵	Status ↓ĵ	Status Date ↓†	Appointee 1	Supervisor 1	Delegating/App Signatory	oointing ↓↑	Appointment Workflow	Appointee History	Action
1	N3560A	HQ NAVAL SERVICE TRAINING COMMAND GREAT LAKES PENSACOLA PROGRAM	Cardholder Appointment	Active	2021/06/21	Randolph Chaney	Timothy Daseler	Beth Kleinschmi	idt	Select	Select	Select
Showing	g 1 to 1 of	1 items								P	revious 1	Next
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4. Scroll down to the bottom and click on "View Appointment Letter" then "Open."

		Last Name		Work Phone Number	Work Email Address		
Beth		Kleinschmidt		847-688-5855	beth.kleinschmidt@navy.mil		
oD Component		DoD Organization		DoD Organization Name	PIEE Role		
DEPT OF THE NAVY		N3560A		NAVAL AIR STATION	Agency/Organization Program Coord		
Date	Action	Status	Name	Signature	PIEE Role		
2021/06/17 15:33:12	Submit	Pending Supervisor Approval	Beth Kleinschmidt	KLEINSCHMIDT.ELISABETH.1017218324	Agency/Organization Program Coordinator		
2021/06/17 16:22:49	Approve	Pending Appointee Approval	Timothy Daseler	Daseler.Timothy	Appointee Supervisor		
2021/06/21 18:14:21	Approve	Active	Randolph Chaney	CHANEY.RANDOLPH.MILES.1243030800	Cardholder		
2021/06/21 18:17:16	Extracted	Active	Randolph Chaney	CHANEY.RANDOLPH.MILES.1243030800	Cardholder		

5. Your CH letter should open so that you can print and save for your files.

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Department of Defense Government Purchase Card Program         MEMORANDUM FOR: Randolph Chaney N3560A: NAVAL AIR STATION Supply Clerical and Technician         SUBJECT: Government Commercial Purchase Card (GPC) Delegation of Procurement Authority and Appointment Letter         SUBJECT: Government Commercial Purchase Card (GPC) Delegation of Procurement Authority and Appointment Letter         e. Department of Defense (DoD) Government Charge Card Guidebook for Fertablishing and Managing	<ul> <li>Search tools</li> <li>Comment</li> <li>Fill &amp; Sign</li> <li>TerraGo GeoPDF</li> <li>TerraGo GeoMark</li> <li>More Tools</li> <li>Convert and edit PDFs with Acrobat Pro DC</li> </ul>
<ul> <li>a. Department of Detense (DoD) Government Charge Card Guidebook for Establishing and Mahaging Purchase, Travel, and Purc Card Programs</li> <li>b. Office of Management and Budget (OMB) Circular A-123, Appendix B</li> <li>c. Federal Acquisition Regulation (FAR) and Supplements</li> </ul>	Start Free Trial
🖽 🔎 Type here to search 🛛 🔄 💽 🧿 🚍 🔯 👘 🥒 🛃 🤅	93°F ∧ <sup>1</sup> □ □ ↓ 11:49 AM 8/13/2021 55

6. Participant is now pending for US Bank role activation. AOPC Level 5 can now activate the user within US BANK PIEE TASK QUEUE.

\*See below for updating JAM appointments after above is completed.

#### GPC ONE-PAGER Updating Appointments in JAM After DoD GPC appointment letters have been be issued, it may CPMs, OA/OPCs, A/OPCs PIEE/JAM become necessary to update appointments to change their Special How do I update my own appointment? Designation (SD), Single Purchase Limit (SPL), or Cycle Limit. 1. Log into PIEE and go to JAM. Who can do this? 2. In the blue JAM ribbon, click My Appointments. The A/OPC and OA/OPC can update the appointments of 3. Select "Search for GPC appointments where I am designated as program officials below them in the hierarchy. the Appointee." o The A/OPC and OA/OPC also can update their own 4. Select the appropriate role with Active status. appointments, but these roles do not have a SD, SPL, or 5. Scroll to the bottom of the Appointee's profile page and click Cycle Limit. Update. o The A/BO and CH cannot update their own appointments. 6. Proceed with the steps on Page 2 for the appropriate task. The DD 577 role cannot be updated. How do I update someone else's appointment? If the A/OPC or OA/OPC who initiated the update has the

delegating authority (DA) required for the update, then he/she automatically signs off and the DA step is skipped in the approval process.

#### What else do I need to know?

- Specific policies, regulations, and SPLs are associated with each SD. Details can be found in the JAM GPC Role Descriptions document.
- It is important to note that, with the implementation of, or increases to, MPTs or (less frequently) SATs, the SPLs of all CHs should not automatically be increased across the board.

- 1. Log into PIEE and go to JAM.
- In the blue JAM ribbon, click Search Appointments.
- 3. Select the appropriate Organization, Appointment, and Active
- status. 4. Click Search.
- 5. Use the up- and down-arrows next to "Appointee" to sort alphabetically, then click Select under the Action column for the appropriate Appointee.
- 6. Scroll to the bottom of the Appointee's profile page and click Update.
- 7. Proceed with the steps on Page 2 for the appropriate task.

Apr 24, 2023 Pege 1 of 2 PIEE DAU DPC/Purchase Card (Can be clicked in Slide Show mode) 3OP:042

low	do I change the SPL or Cycle Limit?	💄 CPMs, OA/OPCs, A/OPCs 🛛 🖳 PIEE/JAM			
<ol> <li>Click Edit next to an existing SD to change SPL or Cycle Limit.</li> <li>Enter the new SD or SPL and update the Effective Date.</li> <li>Scroll to the bottom and click Edit.</li> </ol>	*For details about the 10 CH SDs and their NTE Limits, see <u>30P001</u> , Understanding CH Special Designations.				
4. 5.	Scroll to the bottom and click Next. Scroll to the bottom and click Submit.	How do I remove a SD?			
6. 7. 8.	Click "I concur with the Appointment Certifications." Enter any comments and click Submit. Click Sign.	Scroll to the SDs and click Delete.     Click Delete again.     Scroll to the bottom and click Next.     Scroll to the bottom and click Submit			
Hov 1.	<b>v do I add a SD?</b> Scroll to the SDs and click Add Special Designation.	<ol> <li>Scroit to the bottom and cick Submit.</li> <li>Click "I concur with the Appointment Certifications."</li> <li>Enter any comments and click Submit.</li> <li>Click Sign</li> </ol>			
2.	Select the SD and enter the appropriate SPL, Cycle Limit, and Effective Date, <sup>*</sup> plus any Agency-Specific Policy/Procedure and additional Details. Click Add.	<ul> <li>If the appointment updater already has appropriate delegating authority, the DAS step in the workflow will be skipped.</li> </ul>			
3.	Scroll to the bottom and click Next.	<ul> <li>Appointees will need to countersign the updated appointments.</li> </ul>			
5.	Scroll to the bottom and click Submit.	<ul> <li>Since this is an update to an existing appointment, there will be no action for the GAM as the vola is already active.</li> </ul>			
7.	Enter any comments and click Submit.	<ul> <li>Once the appointment update has been completed, the old</li> </ul>			
8.	Click Sign.	appointment will be inactivated, and the new appointment will become active. • The new, updated, appointment will be sent to the Access Online P			

### **Points of Contact:**

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