GSA SmartPay
Virtual Training Forum
June 13-15, 2023

DoD GPC Electronic Systems Update
Mr. Jim Tew and Ms. Pam Talbott
Agenda

• GPC Systems Summary Functional Workflow and PIEE/JAM Benefits
• Access Online Purchase Log
• Access Online/Insights on Demand – Disputed Transactions
• GPC Program Oversight in Insights on Demand Reminders
• Purchase Card Oversight Module (PCOM) Updates
• JAM Updates
• Helpful Hints and Tips for PIEE/JAM Success
• Defense Enrollment Eligibility Reporting System (DEERS) Interface with PIEE
• Access Online Integration
• FedMall SSO & Relationship to a PIEE User Profile
• How the Help Desk Can Assist You
• Help Desk Process
Reminders

• Chat and Q&A will be at the end of the presentation
• Class surveys
GPC Systems Summary Functional Workflow and PIEE/JAM Benefits
PIEE/JAM References

• Governmentwide Commercial Purchase Card (GPC) Program One-Pagers cover the Procurement Integrated Enterprise Environment (PIEE) and Joint Appointment Module (JAM) GPC-related processes: https://www.acq.osd.mil/asda/dpc/ce/pc/training.html

• JAM GPC Role Descriptions: https://www.acq.osd.mil/asda/dpc/ce/pc/systems.html
  — Include the 10 Special Designation Authority Types
  — Delegating/Appointing Authority (DAA) is usually the head of contracting or another senior official
  — Delegation Authority Signatories (DAS) are individuals authorized to sign JAM GPC delegation of Authority and Appointment Letters. Four roles are DAS:
    • DAA who is registered in (PIEE)
    • DAA who is not registered in PIEE
    • Oversight Agency/Organization Program Coordinator (OA/OPC) with Delegating Authority
    • Agency/Organization Program Coordinator (A/OPC) with Delegating Authority
JAM GPC Appointment Benefits

• DoD GPC policy mandates use of JAM to issue GPC Appointments
  – Ensures compliance with the Federal Acquisition Regulation (FAR), Defense Federal Acquisition Regulation Supplement (DFARS), and DoD GPC Appointment/Delegation of Authority policy
  – Ensures appointment access by appointee, supervisor, and GPC program officials
  – Validates training completion prior to issuance of appointments and issues periodic reminders
  – Satisfies FAR record retention and termination requirements
• JAM use, in conjunction with U.S. Bank’s (the Bank’s) Access Online PIEE Task Queue (PTQ), ensures account purchasing limits cannot exceed delegated procurement authority.
• Triggers automatic access to other PIEE modules such as Access Online (including Web-based Training and Insights On Demand (IOD)), Supplier Performance Risk System (SPRS), FedMall, and Purchase Card Oversight Module (PCOM).
Access Online Purchase Log
Access Online Purchase Log

• DoD and Component GPC policy mandate use of the Bank’s Access Online Purchase Log (Order Management and Transaction Management) and Electronic Attachment Capabilities. Examples of Purchase Log entries that are mandatory include 889 Compliance and Emergency-Type Operations (ETOs) (commonly referred to as “Contingency Operations”) transactions.
  – Access Online data reveals significant compliance issues
  – Recent and pending Access Online enhancements will be leveraged to improve data quality
Access Online Capabilities 101

• Cardholders (CHs) use Order Management (OM) to enter Purchase Log information.
  — Includes 20 Header/Order Detail custom fields and 10 line-item custom fields that can be configured by DoD and Components
  — Orders can be created or edited before or after transactions take place
  — Functionality deployed in May 2022 which allows drop-down fields to default to a blank entry, thereby requiring CHs to select a value for mandatory drop-down fields

• CHs use Transaction Management (TM) to view vendor-provided transaction data, reconcile their transactions, retain transaction-supporting data (TSD), and approve their CH statements.
  — Includes 5 custom fields
  — Can be used only after the transaction posts
  — Updated on 7/1/2022 to include mandatory drop-downs for “889 Designation” and “Emergency-Type Operations”

• OM and TM are configured to work in concert to ensure the monthly reconciliation process cannot be completed before each transaction is matched to an order.

Access Online updates present the Department with the opportunity to improve data integrity.
Access Online Capabilities 101, Cont.

- All Purchase Log fields can be found on the DPC GPC website at
  https://www.acq.osd.mil/asda/dpc/ce/pc/systems.html
  - Document is entitled “Access Online Enterprise Purchase Log Requirements” or “Purchase Log Requirements”, and is CAC enabled
  - Contains both Standard and Custom fields
- Standard Fields:
  - Make up the vast majority of the fields
  - Include fields such as Order Date, Match Status, Amount, Merchant Name, Line of Accounting (LOA), Item Description, etc.
- Custom Fields:
  - Fields that can be configured by DoD. Include the 20 Header/Order Detail custom fields and 10 line-item custom fields that can be configured by DoD and Components.
  - Have not been updated for several years except for adding “889 Designation” and “Contingency Operations” (now “Emergency-Type Operations”).
  - Identified in the “Custom Field” sections of the Purchase Log Requirements document

Access Online updates present the Department with the opportunity to improve data integrity.
Automated GPC Account Funding

• Some Enterprise Resource Planning (ERP) / Access Online system interfaces to bulk fund GPC accounts have been implemented, including procedures that result in the CH’s inability to enter all required Purchase Log data in Access Online.
  – Results in automatic creation of a single e-Order in OM for use on all requirements/transactions made using the bulk funding.
  – When transactions for multiple items at multiple vendors are matched to a single bulk order, compliance and data consistency often are disrupted.
  – TM does not include a sufficient number of fields to capture all required data.

• Defense Pricing and Contracting / Contracting eBusiness (CeB) is working with the DoD Comptroller to identify bulk funding alternatives that will comply with both financial management and purchasing policies.
Upcoming/Recent Purchase Log Custom Field Changes in Order Management

To improve the quality of data, compliance, and oversight for the Purchase Log, CeB is updating the mandatory Purchase Log data standard established in *DoD SmartPay® 3 (SP3) Government-wide Commercial Purchase Card Policies, Procedures and Tools – SP3 Transition Memorandum #6* to support consistent Department-wide reporting, data integrity, and auditability. This is the Phase 2 effort addressed in *Governmentwide Commercial Purchase Card Guidance Related to Recording 889 Designation and Emergency-type Operation Values (GPC 2022-02)*.

- OM drop-down issue was fixed in May 2022.
- A working group was established in July 2022 with members from the Army, Air Force, Navy, and Other Defense Agencies and Activities. The working group reviewed and voted on 20 order/header-level custom fields and 10 line-item-level custom fields.
- Non-editable eOrders will remain noncompliant unless action is taken to make the eOrders editable or to have the source ERP populate the standardized Access Online Purchase Log.
Upcoming/Recent Purchase Log Custom Field Changes in Order Management: What Was Considered

What was considered?

• Field names
• Attributes (free-form text versus drop-down)
• Current usage rate
• Quality of data entered
• Useful data: Data for end users and ways it could be used at Component and Department levels to improve the program
• Preservation of historical data
• SP3 Data Mining (DM) Transaction Review Questions
• DoD GPC Program Policy
• Statutes, regulation, policy, etc.
• Frustrated freight
• Workload drivers: Balanced value of fields versus time and resources to complete the Purchase Log
## Upcoming/Recent Purchase Log Custom Field Changes in Order Management: Header/Order Detail Level (1 of 5)

<table>
<thead>
<tr>
<th>Current (For Majority of Components)</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Field</strong></td>
<td><strong>To Be Field Name</strong></td>
</tr>
</tbody>
</table>
| Authorization Number                 | Request to Purchase Received | Drop Down | 1. Written request provided  
2. Self-Generated Purchase-Ind Recpt/Accept Required  
3. Refund, Credit, External Fraud, or Disputed | Mandatory |
| Requestor Name                       | Requestor Email          | Free Form   | 1. Yes  
2. None Required  
3. Non-Compliant: Pre-Purchase Approval not Obtained | Mandatory |
| Socioeconomic Indicator/Merchandise Received Date | A/BO or Financial Mgr Pre-Purch Approvals Obtained | Drop Down | 1. Micro-Purchase (MP) Cardholder (CH)  
2. Micro-Purchase Convenience Check Writer  
3. Micro-Purchase ETO CH and/or Check Writer  
4. Higher Education Micro-Purchase CH  
5. Warranted Overseas ETO CH  
6. Contract Ordering Official CH  
7. Overseas Simplified Acquisition CH  
8. Contract Payment Official CH  
9. Misc Payments Official CH (SF-182 Training)  
10. Inter/Intra-Government Payment Official CH  
11. N/A-Refund or Credit  
12. N/A-External Fraud  
13. N/A-Disputed Transaction | Optional |
| Contract Payment Method              | Delegated Procurement Authority Used | Drop Down | 1. Micro-Purchase (MP) Cardholder (CH)  
2. Micro-Purchase Convenience Check Writer  
3. Micro-Purchase ETO CH and/or Check Writer  
4. Higher Education Micro-Purchase CH  
5. Warranted Overseas ETO CH  
6. Contract Ordering Official CH  
7. Overseas Simplified Acquisition CH  
8. Contract Payment Official CH  
9. Misc Payments Official CH (SF-182 Training)  
10. Inter/Intra-Government Payment Official CH  
11. N/A-Refund or Credit  
12. N/A-External Fraud  
13. N/A-Disputed Transaction | Mandatory |

**Note:** Fields are listed in approximation of order completion by the CH.

### Legend

- **Exact Same**
- **Current and New Field are Similar**
- **NOT Keeping field**
- **Moving to Line Item**
- **New Field**
- **PMO or Component Reserved Field**
### Upcoming/Recent Purchase Log Custom Field Changes in Order Management: Header/Order Detail Level (2 of 5)

<table>
<thead>
<tr>
<th>Current (For Majority of Components)</th>
<th>Field</th>
<th>To Be Field Name</th>
<th>Freeform or Drop down?</th>
<th>Values in Drop Down</th>
<th>Mandatory or Optional?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract/Federal Supply Schedule #</td>
<td>Contract/BPA/FSS/Order Number</td>
<td>Free Form</td>
<td></td>
<td></td>
<td>Optional</td>
</tr>
</tbody>
</table>
| Hazardous Materials                  | Special Pre-Approval Obtained | Drop Down | 1. No Items require Special Approvals  
2. Yes-Unmanned Aerial Systems (UAS)  
3. Yes-Bottled Water  
4. Yes-Hazardous Material  
5. Yes-Information Technology (IT)  
6. Yes-Other - Identify in Comments Fields  
7. Yes-Multiple-Identify All in Comments Fields  
8. Non-Compliant: Required Pre-Approval not Obtained | Mandatory |
| Transaction Method Code              | Emergency-Type Operation (OM) | Drop Down | 1. Not in support of ETO  
2. Applicable code not in this list  
3. O14S-Operations in Iraq and Syria  
4. O15F-Operation Freedom’s Sentinel  
5. O21R-Operation Allies RefugeWelcome | Mandatory |
| Contingency Operations               | ADD’L Code or Event Info (ETO) (OM) | Free Form | | | Optional |

Note: Fields are listed in approximation of order completion by the CH.
# Upcoming/Recent Purchase Log Custom Field Changes in Order Management: Header/Order Detail Level (3 of 5)

<table>
<thead>
<tr>
<th>Current Field</th>
<th>To Be Field Name</th>
<th>Freeform or Drop down?</th>
<th>Values in Drop Down</th>
<th>Mandatory or Optional?</th>
</tr>
</thead>
</table>
| **UID Required** | Sustainable Acquisition | Drop Down | 1. Sustainable Acquisition Considered & Followed  
2. Delivery, price or perf reasonableness not met  
3. Exception - Performed outside the U.S.  
4. Other FAR 23 exemption applies  
5. Refund, Credit, External Fraud, or Disputed  
6. Non-Compliant: Sustainable Acq not Considered | Optional |
| **Merchandise Due Date** | Items subject to section 508 Consideration? | Drop Down | 1. No item(s) in order are subject to 508 requirement  
2. Yes-Subject item(s) are compliant  
3. Yes-Exception (Excp)-Legacy ICT (Safe Harbor)  
4. Yes-Excp-National Security Systems  
5. Yes-Excp-Federal Contract (ICT that is incidental)  
6. Yes-Excp-In Maintenance/Monitoring spaces  
7. Yes-Excp-Undue Burden/Fundamental Alteration  
8. Yes-Excp-Best meets  
9. Yes-Excp-Revised 508 Standards Applicability CkLst  
10. Non-Compliant: Subject Item(s) are not compliant | Optional |
| **Merchandise Need Date** | Third Party Payment service required | Drop Down | 1. No 3rd Party pay service was required  
2. See attached detail review/approval from ABO/AOPC  
3. Non-Compliant: Review/Approval not Obtained | Optional |
| **Property Book** | Required Source Screened | Drop Down | 1. Purchased from Required Source  
2. Exception or Waiver Applies  
3. No FAR 8 Required or Other Required Sources Apply  
4. Non-Compliant: Not Purchased from Required Source | Mandatory |

**Legend**
- Exact Same
- Current and New Field are Similar
- NOT Keeping field
- Moving to Line Item
- New Field
- PMO or Component Reserved Field

**Note:** Fields are listed in approximation of order completion by the CH.
### Upcoming/Recent Purchase Log Custom Field Changes in Order Management: Header/Order Detail Level (4 of 5)

<table>
<thead>
<tr>
<th>Current (For Majority of Components)</th>
<th>Field</th>
<th>To Be Field Name</th>
<th>Freeform or Drop down?</th>
<th>Values in Drop Down</th>
<th>Mandatory or Optional?</th>
</tr>
</thead>
</table>
| Source Currency Amount              | Equitable Distribution Accomplished? | Drop Down | 1. Yes  
2. No  
3. Overseas Simplified Acq WITH max Competition  
4. Overseas Simplified Acq WITHOUT max Competition  
5. N/A | Optional |
| E-Order User ID                     | Vendor Responsibility Determination Completed | Drop Down | 1. Yes  
2. No  
3. N/A-Refund, Credit, External Fraud, or Disputed | Optional |
| Miscellaneous Amount                | 889 Designation (OM) | Drop Down | 1. 889 Merchant Rep  
2. 889 ODNI  
3. 889 Exception  
4. 889 Payment  
5. 889 Non-Compliant  
6. Fraudulent (external) Transactions  
7. Disputed Transactions  
8. US Bank Fee (e.g., Convenience Check)  
9. Refunds & Trans Credits/Discounts  
10. Memo For Record approved by A/OPC | Mandatory |

Note: Fields are listed in approximation of order completion by the CH.

<table>
<thead>
<tr>
<th>Legend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exact Same</td>
</tr>
</tbody>
</table>

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## Upcoming/Recent Purchase Log Custom Field Changes in Order Management: Header/Order Detail Level (5 of 5)

<table>
<thead>
<tr>
<th>Current (For Majority of Components)</th>
<th>Field</th>
<th>To Be Field Name</th>
<th>Freeform or Drop down?</th>
<th>Values in Drop Down</th>
<th>Mandatory or Optional?</th>
</tr>
</thead>
</table>
| OCONUS Shipment Method                |       | Final Delivery Location Outside United States? | Drop Down | 1. No  
2. Yes-Ship commercial carrier (e.g., DHL)-DTS NOT req  
3. Yes-Via postal service to APO/FPO  
4. Yes-MSLabel provided to vendor for DTS Shipment | Mandatory |
| Shipping Data                        |       | MSLLabel-enter TCN/TAC/Dest DoDAAC | Free Form |                               | Optional               |
| PMO Reserved 1 (was 889 Designation) |       | PMO Reserved 1 | Free Form |                               | Optional               |
| PMO Reserved 2                        |       | PMO Reserved 2 | Free Form |                               | Optional               |
| Other Data                            |       | Component/Agency Reserved 1 | Free Form |                               | Optional               |

Note: Fields are listed in approximation of order completion by the CH.
### Upcoming/Recent Purchase Log Custom Field Changes in Order Management: Line Item Level

<table>
<thead>
<tr>
<th>Field</th>
<th>To Be Field Name</th>
<th>Freeform or Drop down?</th>
<th>Values in Drop Down</th>
<th>Mandatory or Optional?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part # / MPN</td>
<td>Part # / MPN</td>
<td>Free Form</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>Req Tracking No</td>
<td>Req Tracking No</td>
<td>Free Form</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>Mat Group</td>
<td>Mat Group</td>
<td>Free Form</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>Requisitioner</td>
<td>Requisitioner</td>
<td>Free Form</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>Plant</td>
<td>Plant</td>
<td>Free Form</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>Storage Loc</td>
<td>Storage Loc</td>
<td>Free Form</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>Delivery Date</td>
<td>Estimated Delivery Date</td>
<td>Free Form</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>SRN</td>
<td>SRN</td>
<td>Free Form</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>Is/will be entered into Property Book when req.?</td>
<td>Drop Down</td>
<td>1. No 2. Yes</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>UID Required</td>
<td>Drop Down</td>
<td>1. No 2. Yes</td>
<td></td>
<td>Optional</td>
</tr>
</tbody>
</table>

**Legend**
- **Exact Same**: Current and New Field are Similar
- **NOT Keeping field**: Moving to Line Item
- **New Field**: PMO or Component Reserved Field
Upcoming/Recent Purchase Log Custom Field Changes in Order Management: Header/Order Detail Level Mockup (1 of 2)

**General Section**

- Request to Purchase Received:*
  - Select value from drop down: C17AMD
- Requestor Email:*
  - Free Form Text Entry, C9AMF
- A/BO or Financial Mgr. Pre-Purch Approvals Obtained:
  - Select value from drop down: C13AOD
- Delegated Procurement Authority Used:*
  - Select value from drop down: C6AMD
- Contract/ BPA/FSS/ Order Number:
  - Select value from drop down, C19AOF
- Special Pre-Approval Obtained:*
  - Select value from drop down, CSAMD
- Emergency-Type Operation (OM):*
  - Select value from drop down: C12AMD
- Add’t Code or Event Info (OM):
  - Free Form Text Entry, C11AOF
- Sustainable Acquisition:
  - Select value from drop down, C5AOD
- Items subject to Section 508 Consideration?*
  - Select value from drop down, C14AOF
- PMO Reserved 1
  - Reserved for Future PMO Use — Display to reserve historical 889 Designation Info, C7
- PMO Reserved 2 (Org may choose to display but may not edit contents)

**Financials Section**

- Third Party Payment Service Required:
  - Select value from drop down, C15AOD

**Legend:**
- C=custom; CL=Custom Line Item; 1-20=Field Number; A=Appears on form; M=Mandatory, O=Optional; D=drop down, F=Free Form; B=Bank
- Red fill= Must appear on form and must be completed by CH; Yellow fill=Must appear on form and Optional for CH to complete—Org may choose to make mandatory for CH to complete; Grey fill=appears on form; White Fill=Org may choose to appear on form.
Upcoming/Recent Purchase Log Custom Field Changes in Order Management: Header/Order Detail Level Mockup (2 of 2)

**Merchant Section**

- **Required Sources Screened:**
  - Select value from drop down.
  - C2AMD

- **Equitable Distribution Accomplished:**
  - Select value from drop down.
  - C1ADD

- **Vendor Responsibility Determination Completed:**
  - Select value from drop down.
  - C20AOD

- **889 Designation (OM):**
  - Select value from drop down.
  - C10AMD

**Shipping Section**

- **Ship to**
  - Select value from drop down.
  - C4AMD

- **Final Delivery Location Outside United States?**
  - Select value from drop down.
  - C4AMD

- **MSLabel-enter TCN/TAC/Dest DoDAAC**
  - Free Form Text Entry.
  - C16AOF

**Notes:**
- C=custom; CLI=Custom Line Item; 1-20=Field Number; A=Appears on form; M=Mandatory, O=Optional; D=drop down, F=Free Form; B=Bank
- Red fill= Must appear on form and must be completed by CH; Yellow fill= Must appear on form and Optional for CH to complete—Org may choose to make mandatory for CH to complete; Grey fill= appears on form; White Fill= Org may choose to appear on form.
Upcoming/Recent Purchase Log Custom Field Changes in Order Management: Line Item Level Mockup (1 of 1)

Line Item Section

<table>
<thead>
<tr>
<th>Part #/MPN:</th>
<th>UID Required:</th>
<th>Estimated Delivery Date:</th>
<th>Is/will be entered into Property Book when req.?</th>
<th>Select value from drop down. CLI19AO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free Form Text Entry. CLI1AOF</td>
<td>Select value from drop down. CLI10AOD</td>
<td>Free Form Text Entry. CLI7AO</td>
<td>Select value from drop down. CLI19AO</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Req Tracking No:</th>
<th>Mat Group:</th>
<th>Requisitioner:</th>
<th>Plant:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Storage Loc:</th>
<th>SRN:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free Form Text Entry.</td>
<td>Free Form Text Entry.</td>
</tr>
</tbody>
</table>

Note: Other custom line item fields that are available for use if the organization wants them to appear in the line item area:

- Part #/MPN, Req Tracking No, Mat Group, Requisitioner, Plant, Storage Loc, SRN

- C=custom; CLI=Custom Line Item; 1-20=Field Number; A=Appears on form; M=Mandatory, O=Optional; D=drop down, F=Free Form; B=Bank
- Red fill= Must appear on form and must be completed by CH; Yellow fill=Must appear on form and Optional for CH to complete—Org may choose to make mandatory for CH to complete; Grey fill=appears on form; White Fill=Org may choose to appear on form.
Purchase Log Best Practice and On the Horizon

• Best Practice: Until drop-downs are available in OM for 889 Designation and ETOs, input values in free form text exactly as indicated in Governmentwide Commercial Purchase Card Guidance Related to Recording 889 Designation and Emergency-type Operation Values (GPC 2022-02).

• Current and future steps in the process:
  – Work with the Bank to deploy the new Standard Purchase Log.
  – Issue a Purchase Log Standard Operating Procedure that includes new fields/values guidance.
  – Preserve historical data for fields that have changed attributes in the new standard.
  – Facilitate (map) appropriate data transmission from the ERP to the new standard fields, where applicable.
  – Analyze issues related to non-editable/non-bulk-funded eOrders to determine what solutions are available.
  – Analyze issues related to bulk funding to determine what solutions are available.
Access Online/IOD – Disputed Transactions
Access Online/IOD – Disputed Transactions

• SP3 Data Mining (DM) has helped to identify risk areas to focus on to improve the purchase card program. As a result of DM, Integrated Solutions Team (IST) meetings, and Component Program Manager (CPM) monthly meetings, it has become clear that improvements are needed, and possible, for disputes.
• An analysis of DoD disputes data showed that 56.8% of disputed transactions are resolved in favor of the merchant, a significantly higher amount than expected.
• During the COVID-19 pandemic, the Bank developed a capability to use email correspondence rather than paper communication with CHs for some disputes. For some disputes, the Bank uses the Account Administration email address in Access Online to contact the CH and collect dispute documentation.

Requirements:

1. CHs **must** have a valid email address recorded in Account Administration in Access Online to receive dispute documentation correspondence via email
2. CHs **must** enable email notification for Disputes via My Personal Information in Access Online
Access Online/IOD – Disputed Transactions: Potential Reasons for High Rate of Resolution in Favor of Merchant

1. CHs dispute transactions inappropriately
   • CHs “forget” they ordered something and dispute the transaction rather than calling the merchant to work it out
   • CHs work it out with the merchant AND dispute the transaction

2. CHs dispute transactions to cover up fraud or other suspect behavior
3. CHs do not provide dispute supporting documentation to the Bank, or do not provide it on time
   • Time frames required by the Bank may vary; CH must pay close attention to dispute instructions in Access Online and/or from the Bank and comply with the time frame provided for each specific dispute.
   • Example: If disputing in Access Online, the CH MUST print, sign and fax or mail (within 21 days) the form from Access Online and the other required documentation to the Bank in accordance with instructions (screen to do so pops up after the request has been successfully completed so CHs may not know this is required)

If disputing in Access Online, the CH MUST print, sign and fax or mail (within 21 days) the form from Access Online and the other required documentation to:

3. CHs do not provide dispute supporting documentation to the Bank, or do not provide it on time, cont.
   • Telework may delay/prevent CHs from receiving mail from the Bank, making it difficult to send required documents in a timely manner.
     – CHs often not in the office to receive mail, send mail, or use fax machine
     – CHs may not have access to a printer-scanner or fax machine at the telework location
   • As addressed in a previous slide, the Bank can now use the Account Administration email address to contact the CH and collect dispute documentation. If available, the Bank typically will contact CHs using email. Therefore, continued Component CH training is needed to reinforce that:
     – **Users must have a valid email address recorded in Account Administration in Access Online to receive dispute documentation correspondence via email.** Email would be the first method of communication if a valid email is associated with a CH account in Access Online Account Administration. If a valid email is not associated with the CH account in Access Online Account Administration, communication to the CH will be sent via U.S. Postal Service. **Note: email must be included in Account Administration for each account the CH has.**
     – **Users may enable email notification for Dispute Status Changes via My Personal Information in Access Online.** Once in “My Personal Information,” navigate to the “Email Notifications” section, and select the radio button for “Dispute Status Email Notification.”
GPC Program Oversight in Insights On Demand (IOD) Reminders
# 3-Pronged Oversight Review Process

## Daily DM Case Reviews
**Purpose:**
- Detect/Prevent Improper Purchases
- Document Corrective Actions

**Players:**
- A/BOs
- A/OPCs
- Supervisors

**Process:**
- Insights On-Demand (IOD) Initiates Cases for Review
- A/BOs Complete Reviews
- A/OPCs Verify All A/BO Input, Document Corrective Action, and Close Case
- Supervisor & A/OPC collaborate to take Personnel Action As Necessary

**Product:**
- Closed Cases / Documentation of Corrective Action

## Monthly A/OPC Reviews
**Purpose:**
- Document Oversight Actions
- Review Internal Controls
- Ensure DM Case Closure
- Engage Supervisors
- Enable Tactical / Operational Decision Making

**Players:**
- Supervisors
- A/OPCs
- OA/OPCs

**Process:**
- A/OPC:
  - Verifies 100% DM Case Closure
  - Reviews Key Internal Controls
  - Documents Review Results
  - OA/OPC
  - Reviews A/OPC Submissions

**Product:**
- Monthly A/OPC Review Report

## Semi-Annual Head of Activity Reviews
**Purpose:**
- Ensure Leadership Insight
- Enable Organizational / Strategic Decision Making

**Players:**
- A/OPCs
- OA/OPCs
- CPMs
- Heads of Activity (HA) - Commanding Officers / Procurement Leads / SPEs
- OUSD(A&S) / DPC

**Process:**
- HAs at Each Level Receive Program Briefings from their A/OPCs, OA/OPCs or CPMs and Sign-Off
- A/OPCs, OA/OPCs or CPMs Affirm Completion
- CPMs Provide Brief to OUSD(A&S) / DPC / CeB

**Product:**
- Semi-Annual HA Review Report

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**Procurement Management Reviews / Internal Control Reviews / Inspector General Reviews**

**Integrated Solutions Team**
## Monthly A/OPC Reviews and Semi-Annual Head of Activity Review (SAHAR) Schedule

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<td>Monthly A/OPC Review 3 (December 2022 cycle)</td>
<td>11/20/2022</td>
<td>12/19/2022</td>
<td>12/20/2022</td>
<td>1/18/2023</td>
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### Due

- Cycle Start Date: 9/20/2022
- Cycle End Date: 10/19/2022
- A/OPC Runs Report:
- A/OPC Review Complete - Can Suspend Purchasing:
- 1st Oversight A/OPC Review Complete - Can Suspend Purchasing:
- 2nd Oversight A/OPC Review Complete - Can Suspend Purchasing:
- CPM Review Complete - Shall Suspend Purchasing:
- CPM Provides HA Results to DPC:
Daily DM Cases and Monthly/SAHARs

- Example: DM Case created in the April 2023 cycle*
  - April Daily DM Cases should have been adjudicated and closed no later than 6/13/2023, and accounts suspended when the cases were not closed.
  - The April cycle Monthly A/OPC Review should be completed by 6/13/2023. To complete this, all April cycle DM cases have to be adjudicated and closed.
  - The second half of fiscal year 2023 (FY23) SAHAR must be completed and submitted to DPC by 1/16/2024. All Daily DM cases must be adjudicated and closed and all Monthly A/OPC Reviews must be completed for the 6-month period. Additionally, any DM case that was “Closed-Not Reviewed” due to a deferral needs to be closed with a valid review.

- Purchase Log and Supporting Documentation Impact**
  - A complete and documented Purchase Log assists in adjudicating and closing Daily DM cases in IOD.

- GSA Statistical Reporting Impact***
  - DM cases from the second half SAHAR period (3/20 – 9/19) must be adjudicated and closed by 11/13 to ensure GSA Statistical Reporting for the Department can be submitted by the end of December.***

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*Department of Defense SmartPay® 3 Government-wide Commercial Purchase Card Policies, Procedures and Tools – SP3 Transition Memorandum #6
**Department of Defense Government Charge Card Guidebook for Establishing and Managing Purchase, Travel, and Fuel Card Programs
***OMB Circular No A-123 Appendix B (Revised 8/27/2019)
SAHAR Guides

• When using the Bank-generated “Insights on Demand A/OPC Monthly/SAHAR Report Line Item Validation Using Access Online” guide at https://www.acq.osd.mil/asda/dpc/ce/pc/smart-pay.html to verify IOD data against Access Online:
  — Make sure to schedule reports in Access Online according to directions
  — Any deviation from the instructions can result in large variances and will likely indicate, incorrectly, that the data is inaccurate

  — A description of each line
  — The source of the data that populates each line
  — The calculation used for each line
  — User guidance for each line
The Semi-Annual Head of Activity Review Template slides found under “Additional Training Resources” on the DPC website at https://www.acq.osd.mil/asda/dpc/ce/pctraining.html, were updated in January 2023.

Updates include:

- Slides now include instructions on how to populate charts with your Component’s data.
- The Backlog analysis was removed from the slides.
Semi-Annual Head Of Activity Review Template, Cont.

• Information included in the Template slides:
  – Volume of Transactions and Spend for the Period
  – Refunds for the Period
  – Delinquencies for the Period
  – Total Transaction Volume compared to DM Cases
  – Case Data for the Period - Total DM cases flagged, auto closed by Tier 2 Tailoring, and manually created; and True Positive Rate

• An important note included in the updated slides is that Heads of Activity are responsible for managing program risk. This includes validating that any Component Tier Two Tailoring of the DM business rules (e.g., auto closing potentially high-risk cases without requiring A/BO and A/OPC review) is consistent with regulations and policy, and results in an appropriate number of cases being manually reviewed to detect and prevent fraud and other policy non-compliance.
Semi-Annual Head Of Activity Review Template, Cont.

• Per SP3 Transition Memorandum #6, Semi-Annual HA Reviews are conducted to ensure adherence to internal controls and facilitate senior management’s awareness of their GPC program’s health (e.g., strengths and areas requiring improvement).
  – Use of the Template slides, or portions of the slides, is considered a best practice. The Template slides include data that is not directly displayed in the SAHAR, such as data broken out by monthly cycle.
  – The template provides assistance in having conversations with your Component’s HA.
Purchase Card Oversight Module (PCOM) Updates
What is PCOM?

- PCOM is a module within PIEE.
- It is a system that supports the preparation and submission of SAHAR reporting by Components as required by the Office of the Under Secretary of Defense (Acquisition and Sustainment) (OUSD(A&S)) / Assistant Secretary of Defense (Acquisition) / Defense Pricing and Contracting (DPC).
- In the future, it will also support the preparation of routine reports required by the Office of Management and Budget (OMB) and the General Services Administration SmartPay® Center for Charge Card Management (CCCM).
PCOM Purpose

- Primary users are DPC and GPC CPMs.
- The first phase of PCOM was released in July 2022. It is currently used by waived organizations (do not use IOD) to generate and submit their SAHAR reporting.
- PCOM is currently being developed with its second release planned for 2023. The second phase will be used by non-waived organizations to update and submit their SAHAR reporting.
- With both data aggregates, PCOM can serve as the single source of Department-wide GPC Program Oversight Reporting (e.g., SAHAR Reporting, DoD Statistical reporting required by OMB).
- Other functions that fit the scope of an Oversight Module may be released in the future.
JAM Updates
JAM Updates

Engineering Change Proposal (ECP) 1297 JAM Enhancements Phase 4 is planned for deployment in early FY24.

*Note* – we will get as many of these developed as possible, but it is likely that not all requirements will be delivered.

Following are the requirements we are requesting in this ECP:

**Reuse Appointment Data or Expand Access:**

- Allow the original initiator and other A/OPCs and OA/OPCs at the same role location DoDAAC or Group to re-initiate an appointment using details from an appointment that was initiated but never fully approved (i.e., it was rejected or abandoned).
- Allow all A/OPCs and OA/OPCs [at PIEE Level 2 Group] to leverage appointment details for an individual with a prior or current PIEE/JAM appointment to initiate a new appointment.
- Allow A/OPCs and OA/OPCs to delete nominations within their span of control. Once deleted, the same nomination can be started again. Only restriction would be if the nomination would result in an appointment that is already active.
JAM Updates, Cont.

- Allow OA/OPCs to terminate other OA/OPC appointments.
- Allow appointments to be updated temporarily for valid reasons such as TDY overseas. This would function like the auditor feature with a suspense date, after which the original appointment becomes “active” again.
- As a CH or A/BO, when an appointment is initiated OR AFTER IT HAS BEEN APPROVED, need to be able to add attachments that are retained and can be viewed by anyone who can view the appointment in JAM. Allow the A/OPC and OA/OPC to add attachments, as well as the appointee.
- Allow CPMs to resend appointments to the Bank; CPMs cannot do this now. Mirrors capabilities that A/OPCs and OA/OPCs currently have.
- Add the Appointment ID to the JAM Appointment Details screen (i.e., where the Resend to Bank button currently exists).
JAM Updates, Cont.

Automatic Access Granted Based on GPC Role:

• Automatically grant all new CPMs, OA/OPCs, A/OPCs, DAAs, AAs, Component Resource Managers (RM), and Oversight RMs the Electronic Data Access (EDA) Advance Reporting role.

• Automatically grant all current CPMs, OA/OPCs, A/OPCs, DAAs, AAs, Component RMs, and Oversight RMs the EDA Advance Reporting role.

• Automatically grant all new CHs with the Contract Pay and Contract Ordering Officer SD, and their A/BOs and A/OPCs the EDA Advanced Reporting role.

• Automatically grant all current CHs with the Contract Pay and Contract Ordering Officer SD, and their A/BOs and A/OPCs the EDA Advanced Reporting role.

• Stop providing CHs with the Acceptor role automatically.

• Provide GPC View Only user access to PCOM. The user must be at Level 2.
JAM Updates, Cont.

Automatic Termination of JAM Appointments

• Update existing PIEE (not JAM-specific) email notifications sent to users when PIEE roles are archived to include notification that all associated JAM appointments will be terminated within the number of days specified in the configurable system parameter. The email notification should identify the initiator and other OA/OPCs and A/OPCs with the same Role Group/DoDAAC.

• Create email notification for when appointments are auto terminated due to archiving (and subsequent days having passed) that JAM appointments has been terminated. The email notification should include the initiator (where this is an appointment that is not self initiated) and other (O)A/OPCs with the same Role Group/DoDAAC.
JAM Updates, Cont.

Training Data

- Add a drop down to the training page that allows GPC PMO to specify for which Component the course is being added. In the training list, present DoD's Training list and the component identified training. Add drop down to the training report parameters and report itself. "Component Specified" -> "DON" -> "How to dance 101" -> then normal fields
- Allow the training table to have breaks “----Mandatory----, --Component Specific---, etc.”
- Provide the GPC PMO the ability to move courses up and down in the dropdown.
- Notify the PIEE PMO and GPC PMO user if data for a DAU course stops flowing for 5 consecutive days.
- Where training data is acquired from DAU, under the "Certificate" column in the training table instead of leaving it blank, insert "Certificate stored within DAU".
For each Course, allow the GPC PMO to determine whether the course is displayed to the end user. If it is not displayed it will be used to capture information from the DAU feed, but not available for manual selection and entry/completion. These courses will still appear in reporting.

Use Case: Completion of certain DAU Contracting, Ethics and Contingency, 889 courses will be useful for A/OPCs to see when delegating specific Special Designations, but users would not be adding them to their profile separate from the feed. As currently functioning, the pick list has become too long for a manageable UI.

Add the ability to edit training entries in PIEE profiles. Currently one must archive the training entry in JAM and re-add it just to edit the frequency, date etc. Often, course names are input incorrectly and need to be updated.
JAM Updates, Cont.

• Allow Supervisors/Alt Supervisors with a PIEE Account to see the training and appointment data for their users.
• If refresher training has not been taken timely, allow the OA/OPC and A/OPC who can see the appointment to archive the role. This will give the appointee 30 days to complete their training.
• If refresher training is completed after the role was archived and before the appointment was auto terminated, allow the OA/OPC or A/OPC to reactivate the role.
• Update training reminder email to remove Provider/DAU reference:
  — Change from: "Please logon to [Provider] and retake the training course as soon as possible."
  — Change to: "Please retake the training course as soon as possible.‘“
JAM Updates, Cont.

Other
• Capture the Total Business Reporting (TBR) hierarchy on the JAM appointment. (PTQ Access assistance)
• In each of the appointment letters, the reference to 10 U.S.C. 2784 needs to be replaced with 10 U.S.C. 4754. Additionally, we need to review the other references to see if they are accurate.
• Allow OA/OPCs to make administrative changes to appointments without requiring the full workflow. For Example - update the direct user and demographics from the profile.
• Update the appointment workflow visualization for A/BO, CO, and CH appointments so the Nomination steps are also included.
JAM Updates, Cont.

• Add a full Appointment History section to an appointment and letter. Create a new section on the appointment that captures all changes that happen to the appointment. Discuss how to integrate the existing Appointment Workflow section in the appointment history section. This section will be added to the end of the letter (new page). Addendum will be added here, as well.

• Update the appointment Workflow section at the bottom of the JAM appointment to match the updates to the appointment letter identified above.

• Show a time stamp and the individual responsible for when the appointment was Initiated, Approved by DAS, Activated, Updated (including admin updates), and Terminated. Show the link to the old appointment that this updates. Show the changes from old to new, including specifics about the updates to the appointment such as new DA added, and old DA authority removed.
Bulk Appointment Updates

- Create an area in JAM for CPMs, OA/OPCs and A/OPCs to enter role specific text for use in all their appointments.
- Add three fields to CH and A/BO appointments: CPM Agency Specific Text; OA/OPC Specified Language; A/OPC Specified Language. Each of these text boxes will pre-populate with the language specified in their CPM, OA/OPC, and A/OPC specific text. It will not be editable as individual language can be modified in existing user's appointment text boxes.
- Allow the OA/OPC and A/OPC to make bulk changes by appointment type based on the language in their specific text boxes.
- Allow for the Mass Updating of Appointments. This will allow (O)A/OPCs the ability to quickly update the appointments of individuals who need, for example, updates to their Delegated Limits.
- Provide the ability for GPC PMO to Update Standard text on letters, add the specific changes (Z was changed from :X to :Y) to the Appointment History, and send a notice to the Initiator, Supervisor, Direct User, and the appointee when this occurs. The email notification should document what, when, and by whom the change was made.
- When standard text is updated, allow the GPC PMO to determine if the full appointment approval workflow needs to be completed, if a single approval is required, or no approvals are required. Follow the workflow as necessary thereafter.
JAM Updates, Cont.

Reporting
• EDA reporting (JAM appointment status report) should show the reason for inactivation: Inactive-due to update (old appointment), inactive-terminated (appointment terminated), inactive-in progress (Workflow never completed)
JAM Updates, Cont.

Interface

• Capture Authorized DoDAACs and send them via "Auto Administrative Update" status.
  — TBD, Pending acceptance by Bank to go this route for PTQ fix

• Send user information to the Bank when a role becomes archived. The Bank will be told to v9 the user's CH and Managing Accounts or to suspend the user account (not a CH or A/BO). This would be important to DEERS updates and user inactivity cut-off spending. This would apply if the OA/OPC or A/OPC archived the appointee's role due to failure to take refresher training.
  — TBD, Pending agreement with Bank

• Ingest Access Online User file into JAM/EDA and Develop reporting that ties appointment and account data together (BIR309).
  — TBD, Pending Bank's agreement to provide data

• Add an identifier in JAM to display whether the appointment is tied to an Account based on the data provided by the Bank.
  — TBD, Pending Bank
Helpful Hints and Tips for PIEE/JAM Success
Helpful Hints and Tips for PIEE/JAM Success

• **Issue:** A GPC nomination cannot be completed or advanced to JAM appointment initiation

• **Reasons:**
  – Nomination has exceeded 30 days and the role has moved from “inactive” to “archived”
  – An incorrect Role Location Code was entered, and nominator can’t fix it
  – A GAM blocks the role nomination trying to help fix a stuck nomination

• **Helpful Hints:**
  • Nomination acceptance and approval, JAM appointment completion and GAM activation of the GPC role ALL must occur within 30 days after the supervisor approves the nomination.
  • If possible, avoid GAM involvement with the nomination process.
Helpful Hints and Tips for PIEE/JAM Success, Cont.

• If a role goes to “Archived” status take the following steps:
  – The nominee should log into PIEE and navigate to “Manage Roles.”
  – Select the “Archived” JAM role/roles (if A/BO and CO combo) that require reactivation by checking the box that corresponds with the role/roles being reactivated.
Helpful Hints and Tips for PIEE/JAM Success, Cont.

• After selecting “Request Activation” the following steps will be completed to re-activate (role will return to “inactive” status) the role:
  — Verify Profile, Verify Supervisor/Agency, Verify Roles and Justification/Attachments
• When these steps are complete, a Success page is displayed.
• The Supervisor will receive an email for approval and will need to approve the role.
• Once the nomination is supervisor approved, the nominator should be able to immediately go into JAM, verify that the user is on the initiation list, and initiate the JAM appointment.
• *Note* – if the nomination has exceeded 60 days, the A/OPC or nominator will have to login to PIEE, go to the GPC Nomination menu, and select “Create Nomination” to nominate the individual again.
• There are occasions where the nomination cannot be advanced to allow initiation of the JAM Appointment. If this is the case, please contact the DISA GSD to open a ticket and we can get the nomination removed to allow a re-nomination to occur.
Helpful Hints and Tips for PIEE/JAM Success, Cont.

Nominator (OA/OPC or A/OPC) nominates GPC/Carholder. (No Role Status)

Cardholder receives email, registers and accepts nomination. Supervisor receives email, approves nomination.

NOTE - this Archive to Active process applies prior to JAM Appointment completion.

CH Logs into PIEE>Manage Role Requests. Reactivation of role. GAM approves to reactivate the role to Inactive status for another 30 days.

If JAM Appointment and CH Role are not active in 30 days, system “Archives” the CH Role.

GAM unblocks the role after active JAM Appointment exits and role had been previously activated.

If active JAM Appointment and CH Role are active, system “Archives” the CH Role 7 days after role is archived.

Active CH does not log into PIEE within 90 days.

Active CH does not log into PIEE for 60 days.

After 60 days of inactivity, CH Logs into PIEE to move role back to Active status.

After active JAM Appointment, GAM will activate the CH Role.

GAM unlocks the role request before JAM appointment is completed.

GAM action if the user should not be allowed to have the CH role.

CH Logs into PIEE>Manage Role Requests. Reactivation of role. GAM approves to reactivate the role to Inactive status for another 30 days.

System generated email sent to the nominator.

System generated email sent to the DAS, unless the nominator has designating authority. If nominator has DAS capability, nomination and DAS approval will occur, and the email will go directly to the CH.

Rejection by the DAS or the Appointee will generate a system email sent to nominator and all involved in the workflow.

Nominator (OA/OPC or A/OPC) initiates CH appointment in JAM.

DAS approves CH Appointment. System generated email sent to the CH.

CH rejects appointment.

CH approves appointment.

System generated email sent to the GAM.

GAM activates PIEE CH Role.

CH Appointment XMl sent to US BANK. US BANK Single sign on becomes available in PIEE.

UPDATEING AN ACTIVE APPOINTMENT INACTIVATES (TERMINATES) THE CURRENT ACTIVE APPOINTMENT AND REPLACES IT WITH AN UPDATED ACTIVE APPOINTMENT.

INACTIVE (Terminated)

CH Appointment XMl sent to US BANK. US BANK Single sign on becomes available in PIEE.

Airport Appointment Auto Terminated by DISRS

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CH approves appointment.

System generated email sent to the GAM.

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CH Appointment XMl sent to US BANK. US BANK Single sign on becomes available in PIEE.
Helpful Hints and Tips for PIEE/JAM Success, Cont.

A/OPC 1 at DoDAAC “A” nominates individuals at DoDAACs not equal to AOPC’s DoDAAC. This user may continue to work the appointment.

AOPCs 2 and 3 are also registered at DoDAAC “A.” They should have the same privileges as A/OPC 1 (above) and are permitted to work on the nominations to initiate the appointment or view/update an existing appointment.
Defense Enrollment Eligibility Reporting System (DEERS) Interface with PIEE
DEERS Interface with PIEE

• DEERS interface functions in two ways across PIEE:
  – When the user is registering, the system will query DEERS for the user’s demographic data and will populate the PIEE profile.
  – DEERS will send an update to PIEE letting PIEE know that a user has been terminated/has retired.
  – PIEE will archive the account at this point with a message stating: “The User Account is Deleted by change of status in DEERS”
DEERS Interface with PIEE, Cont.

- PIEE will send an email notification to the PIEE Supervisor, A/OPC, O/AOPC, and terminated user.

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From: <someone@ocsi.com>
Date: Tue, Jul 7, 2020 at 12:00 PM
Subject: IAM GPC - Automated Appointment Termination Notice due to Account Deactivation in DEERS for Sherry Coulson who had appointment(s) in JAM. Role DoDAAC: S0512A
To: <carbon copy>
Cc: <carbon copy>

--This is an automated email. You are being included on this email as you were involved in the appointment of this individual. See specifics of your involvement below.--

User Sherry Coulson's appointments have been auto terminated due to account deactivation in DEERS. The following appointments have been terminated as a result:

Appointment 1 - Certifying Officer Appointment - S0512A/Test
Initiator: Jacob Pons - Test
Supervisor: Andrew Alcime
GAM: Elizabeth Keen - Defense Contract Management Agency

Appointment 2 - Cardholder Appointment - S0512A/Test
Initiator: Susan Rice - Defense Contract Management Agency
Supervisor: Andrew Alcime
Direct User: Stern Alcime - S0512A/Test
GAM: Elizabeth Keen - Defense Contract Management Agency

These appointments have been terminated and are now inactive. If you believe this was done in error, please work with the user to check their DEERS status. Thereafter, the initiator may be able to restart the nomination and appointment processes.

NOTE: This email service is outbound only. We are unable to receive and process replies to this mailbox.
DEERS Interface with PIEE, Cont.

- Specific to JAM, in the event an account is archived due to DEERS interface, the appointment will be terminated (Status: Inactive).
- After a short delay, the termination update will be sent to Access Online.
- Appointments in JAM can still be searched/viewed within the module.

- The appointment workflow section shows reason for auto termination.
Access Online Integration
Single Sign On (SSO) from PIEE to U.S. Bank

• Access to the SSO from PIEE to U.S. Bank has been turned on for all GPC users.
• Once a purchase card role is activated in PIEE, the U.S. Bank Access Online icon will be available on the PIEE landing page.
• When the user clicks the U.S. Bank icon in PIEE, a system check occurs to confirm the first name, last name, and email address for the user are an exact match to the data for accounts in Access Online.
• Ensure that your official Government email address is used in PIEE and Access Online.
• All Access Online accounts that match this criteria will be added to the SSO landing page in Access Online. The user will have the ability to select between all the accounts that are presented.
• Once logged in, the user can go back to the role selection page and select a different role, as necessary.
The PIEE Task Queue was established in 2022 to allow A/OPCs and other designated users with the ability to take actions on JAM appointments.

JAM Appointments, once activated, will be sent to Access Online every few minutes.

Users with the correct PTQ Functional Entitlement Groups (FEGs) will have access to the PTQ to take actions on the appointments that they can see, including, but not limited to: setup a new account, maintain an account, and manage POCs.

These activities can be done from outside of the PTQ but must be done at least once to associate DoDAAC information to Access Online accounts.

Multiple Access Online reports have been updated to include DoDAACs.

For CH appointments, the Single Purchase Limits from the appointment will serve as the ceiling limits for each special designation.

Multiple special designations can be associated with a single card account, though the A/OPC should assign them appropriately to reduce risk.

We recommend users attend the U.S. Bank sessions to learn about the “PIEE Task Queue.”
FedMall SSO & Relationship to a PIEE User Profile
FedMall SSO for PIEE Users

• The primary user benefit of PIEE/FedMall SSO implementation is that CHs with JAM appointments do not have to separately request access, and maintain username and password access, to shop in FedMall.
  – As long as user's login to PIEE at least once every 60 days, they do not lose access to FedMall or any other PIEE App.

• Use of SSO also allows the Department to:
  – Capitalize on the initial and recurring protections realized with CAC issuance, and Supervisor and GAM account approvals.
  – Ensure accounts are associated with only known, appointed individuals who are uniquely identified by their DoD ID/Public Key Infrastructure (PKI), thereby reducing the risk of GPC fraud and misuse.
FedMall SSO for PIEE Users, Cont.

• All CHs with an active JAM appointment and active PIEE role now automatically get the FedMall icon on their PIEE home page.
  – CHs who had FedMall access prior to migration have seamless access through the SSO.
  – CHs accessing FedMall for the first time are directed to their FedMall user profile page and asked to enter any required data that was not available from their PIEE user profile. CHs have to enter their GPC account information in the My Payment Methods section.

• PIEE will maintain the user’s information and history, and FedMall will maintain the user’s shopping information and order history.
How the Help Desk Can Assist You
How the Help Desk Can Assist You

The Defense Information Systems Agency (DISA) Global Service Desk can:

• Provide initial point of entry for all PIEE related issues.
• Create an Information Technology Service Management (ITSM) ticket.
• Perform Tier 1 support for PIEE related issues.
• Assist with PIEE and module access issues due to:
  – Computer settings (JAVA, operating browsers, etc.)
  – Certificate issues when signing on or due to multiple PIEE accounts (GAMs should also be able to assist with this).
• Answer most GPC-related questions.

The DISA Global Service Desk cannot:

• Provide in-depth GPC related analysis for procedural or potential system issues.
The Defense Business Systems Support Office (DBSSO) Tier 2 Help Desk (HD) group and the Joint Interoperability Test Command (JITC) can:

- Provide Tier 2 SME support for escalated process and functionality questions involving:
  - GPC nominations in PIEE
  - JAM Appointments
  - JAM Reporting
- Test potential system issues in the test environment to validate.
- Escalate confirmed or believed system issues for developer analysis and resolution as appropriate.

The JITC cannot:

- Take actions on behalf of the customer in the production environment to resolve their issue.
How the Help Desk Can Assist You, Cont.

The PIEE Program Management Office (PMO) User Engagement Team:

- Monitors all tickets escalated to Tier 2 analysis to ensure issues are being addressed by monitoring ticket movement to correct areas of responsibility in a timely fashion.
- Facilitates a weekly Tier 3 trouble ticket call to discuss Tier 2 ticket issues.
- Liaison for Policy/Functional related issues and forwards issues to the appropriate DPC Product Owners.
- Contains the Defense Business Systems Support Office (DBSSO) Tier 2 Help Desk (HD) group, who are now again the primary point of Tier 2 HD support to assist in analyzing and resolving GPC related issues.
Help Desk Process
Help Desk Process

To report a JAM GPC or related PIEE issue, please reach out to the DISA Global Service Desk at:

Phone: 866-618-5988, 801-605-7095 or by Email: disa.global.servicedesk.mbx.eb-ticket-requests@mail.mil

For JAM training materials visit our PIEE Web-Based Training page:
https://wawftraining.eb.mil/wbt/
Help Desk Process, Cont.
If you have additional questions, please contact us at the DoD GPC Shared Mailbox
dodpcpo@sterlingheritage.com with the subject “TrainingForum2023”