GSA SmartPay® Online Tools
2018 GSA SmartPay® Training Forum
New Orleans, LA
August 7-9, 2018
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Course Overview

- GSA SmartPay Website
- GSA SmartPay Online Training and Reports
- Online Communities
- Social Media
- Looking Ahead to FY2019

https://smartpay.gsa.gov
GSA SmartPay® Website

Background and History

• The 1st Charge Card - developed in the 1960’s by Jerome Svigals and Forrest Parry

GSA SmartPay® Website:

• Offers a Wealth of Information about the Program
• Customer Focused Interface
• Mobile/ Tablet Friendly

https://smartpay.gsa.gov
Interesting Statistics About the Website

• FY2017 – 1,178,045 visitors and almost 6 million page views
• FY2018 through April 2018 – Rate of visitors is up about 2%
• About 1/3 of visitors originate from mobile/tablet
• The GSA SmartPay Training averages over 1,000 visitors per day

https://smartpay.gsa.gov
GSA SmartPay® Website

GSA SmartPay® Saves

- Information about Program
- GSA SmartPay® Benefits
- Key Players in the Purchasing Process
- How GSA SmartPay® Works
- Refunds

https://smartpay.gsa.gov
GSA SmartPay Master Contract Terms and Conditions
Eligibility (Application)
How to Obtain Task Orders
GSA SmartPay 3 Transition Information

https://smartpay.gsa.gov
GSA SmartPay® Website

Statistics

• Program Statistics Overview and Executive Summary
• Monthly Sales Transactions and Account Holder Data
• GSA SmartPay® Program Refunds
• CFO Reports
• Top Vendor Reports
• Card Statistics Reports for FPDS

https://smartpay.gsa.gov
GSA SmartPay® Website

Statistics

• Interesting Data Metrics
  • Updated Quarterly with new data and charts
  • Government-wide
  • Includes program spend by:
    • Geographical regions,
    • Category
    • Top merchant group

https://smartpay.gsa.gov
Statistics – Savings Calculator

- Savings Calculator - An interactive tool for agencies to demonstrate the impact of transferring additional types of spend to the GSA SmartPay® program
- Help Guide for questions using the tool

https://smartpay.gsa.gov
Explainations, Links and Tools related to:

- OMB Circular No A-123 Appendix B
- OMB Memorandum M-13-21
- Federal Acquisition Regulations
- Federal Travel Regulations
- Per Diem Rates
- Public Law
- American Recovery and Reinvestment Act

https://smartpay.gsa.gov
Highlights key tax information:
- Legal History
- Recognizing the Cards
- Common Questions (best practices, what to do if you are charged taxes, etc)
- Specific Tax Information for each State

https://smartpay.gsa.gov
GSA SmartPay® Website

US State Tax Map

- CBAs are exempt in EVERY state
- IBAs are exempt in some states
- All Forms and instructions for each state can be found here
- All state POC information can be found here

https://smartpay.gsa.gov
• Each Business line has a dedicated section and includes:
  • Purchase/ Travel/ Fleet/ Integrated
• Information for Program Coordinators and Account Holders on:
  • Roles and Responsibilities
  • How the Program Works
  • Best Practices
  • Common Questions

https://smartpay.gsa.gov
Resources

- Resources for Account Holders/ AOs, Program Coordinators, Vendors, and State/Local Governments
- Grouped by Business Line (Travel, Purchase, Fleet)
- GSA SmartPay 3 Transition Tools
- Interact Online Community
- Training Forum Presentations
- GSA SmartPay® Audit Repository
  - Multi-agency and agency specific audits related to the program

https://smartpay.gsa.gov
Contact

- Bank Customer Service Centers
  - Phone number
  - Online account Access
- Agency Bank Information
- GSA SmartPay® Support Center

https://smartpay.gsa.gov
GSA SmartPay® Website

News/ Events

- SmartBulletins – provides guidance to customer agencies
- News/ Upcoming Events
- Program Coordinator Spotlight
- Agency Savings Spotlight and Innovation Award Winners
- Multimedia and Videos

https://smartpay.gsa.gov
What Does GSA Provide?

OMB Circular A-I23 Appendix B requires each agency to provide training to all account holders and account managers prior to appointment and every 3 years (or more often if required by your agency’s training policy)

https://smartpay.gsa.gov
GSA SmartPay® Training

What Does GSA Provide?

- GSA offers free Government-wide training courses:
  - Travel Account Holder/ AO
  - Travel A/OPC
  - Purchase Account Holder/ AO
  - Purchase A/OPC
  - Fleet A/OPC (New!)
- 958,000 registered users have completed courses through the GSA SmartPay® Online Training

https://training.smartpay.gsa.gov
Visiting the GSA SmartPay® Training Website

Register if you are a 1st time user OR Login if you have been here before.

Select Training Course:
• Purchase (Account Holder or A/OPC)
• Travel (Account Holder or A/OPC)
• Fleet (A/OPC Only)
• Additional Training

https://training.smartpay.gsa.gov
New GSA SmartPay® Fleet A/OPC Training

Fleet Program Overview
Key Program Participants
Program Coordinator/ Fleet Manager
Responsibilities
Reporting Tools
Risk Mitigation
Policies/ Regulations
Resources
GSA SmartPay Training

Registration

- Complete a one page, one time registration. This will allow us to store your training certificates for future reference.
- Double check that your email and agency are correct.
- Select your roll (A/OPC or Account Holder)
- Create your own unique user ID
- Set up a password and security question

https://training.smartpay.gsa.gov
GSA SmartPay Training
Completing Training

- Click through the training by using the link on the bottom right
- The table of contents is listed under the grey “+” next to the red title bar
- Option to download the training as a PDF to view offline
- “Bookmark my place” allows you to re-enter the training at that point.

https://training.smartpay.gsa.gov
At the end of each training course, you will be asked to complete a short quiz. Each quiz has approximately 25 questions. Click on “Start Quiz” to begin.

https://training.smartpay.gsa.gov
• Results will display after you complete the final question in the quiz.
• Here you can review the questions you got wrong.
• If you passed, you will receive a certificate.
• If you did not pass, you can try again.

https://training.smartpay.gsa.gov
View Results and Certificate

• Click on “My Certificates” to view a list of completed courses.
• Click on “View Certificate” to view/ save/ print your training certificate for each course.
• All training certificates are saved under the My Account link at the top.

https://training.smartpay.gsa.gov
GSA SmartPay Training

My Account

• View Your Information
• Edit Your Information (Name, Email, Phone, etc)
• My Certificates
• My Results

https://training.smartpay.gsa.gov
GSA SmartPay Training

Additional Training

- GSA SmartPay Videos on Specific Topics
- State Tax Information Training
- SP3 Specific Training Modules
  - Task Order Guide Tool Training
  - Needs Assessment Tool Training
  - Transition Tracking Tool Training

https://training.smartpay.gsa.gov
GSA SmartPay Training

Reporting Overview

- Offer a variety of reports to meet agency needs including:
  - Your Personal Training Reports
  - General Reporting (Numbers only)
    - Monthly Trainee Report
    - Total Agency Quiz Report
    - Monthly Quiz Report
  - Detailed Reporting
    - Agency Trainee Report
    - Trainee Search

https://training.smartpay.gsa.gov
• Quizzes Taken by User
  • Quiz results for you, the A/OPC who is logged in
  • Similar to what you see under My Account/ My Certificates
  • Available for All Users

https://training.smartpay.gsa.gov
• **Monthly Trainee Report**
  - The number of **new user accounts** registered per month
  - Overview only, no detail information
  - Export to CSV (Microsoft Excel compatible)

https://training.smartpay.gsa.gov
• Total Agency Quiz Report
  • Total number of quizzes passed per quiz.
  • Filter by date
  • Overview only, no detail information
  • Export to CSV (Microsoft Excel compatible)

https://training.smartpay.gsa.gov
General Reporting

- Monthly Quiz Report
  - Number of passed quizzes per month.
  - Overview only, no detail information
  - Export to CSV (Microsoft Excel compatible)

https://training.smartpay.gsa.gov
Agency Trainee Report

- The **passed quiz results** for an agency, and / or a particular quiz.
- Contains detailed information such as UserName, First Name Last Name, Email, Agency Quiz, Score, Completed Dates and Results.
- Export to a file and can open and manipulate in Excel
- Filter by Quiz and Date

https://training.smartpay.gsa.gov
• Trainee Search
  • Search for a specific account
  • Contains detailed information such as UserName, First Name Last Name, Email, Agency Quiz, Score, Completed Dates and results.
  • Export to a file and can open and manipulate in Excel
  • Filter by Quiz and Date

Note: Only searches within your agency – if an account holder is registered under a different agency, it will not come up in the search

https://training.smartpay.gsa.gov
GSA SmartPay Training

Online Communities

• **Interact Groups**
  - **Discussions with GSA SmartPay** – Interact with other program coordinators or the GSA SmartPay team, share best practices, view non public documents, information, and events
  - **CFO Act Agency Reports and Dashboards** – Fiscal Year Metrics Dashboards, CFO reports, and Refund Summary Reports (Agency Specific)
The GSA SmartPay Travel Card App is available for iOS, Android and Blackberry devices through the Apple App Store, Google Play and Amazon App stores. Resources available through the app include A/OPC contact information, state-specific tax information, and more.
Stay Connected on Social Media

• Tweet: https://twitter.com/GSASmartPayNews
• Friend: https://www.facebook.com/GSASmartPayNews/
• Link: https://www.linkedin.com/in/gsasmartpaynews
Looking Ahead to FY19…

GSA SmartPay Training Enhancements
• Continue to enhance training to meet customer needs incorporating videos and other forms of multimedia

GSA SmartPay Website Enhancements
• All Content will be updated to reflect the new GSA SmartPay 3 contract information

GSA SmartPay App
Questions?

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