

Training Reference Guide



Georgia™

Department of
Administrative Services

State Purchasing Division



Table of Contents

What's New in Professional Development?	2
Updated and New Online Courses	2
Standardized Annual Training Calendar	2
Field Locations	3
Training Processes Updates	4
Who Takes What for Team Georgia Marketplace™ System Access?	6
Training Policies Review	7
Certification.....	7
Recertification.....	8
No-Show and Late Attendance Policy	9
Certification Exam Policy	9
Contact Information	9

What's New in Professional Development?

Updated and New Online Courses

- **Introduction to State Purchasing** has been updated! – For purchasing professionals that function at every level of procurement
- **Contract Management for End Users: Documenting and Communicating Supplier Performance** – For agency personnel working with suppliers on entity contracts
- **Sole Source Purchasing** – For purchasing professionals that need to generate or assist in the procurement of unique items only offered from a single source

Standardized Annual Training Calendar

We recognize that our procurement professionals have to be trained before they can effectively perform in their jobs. Through a rigorous process-mapping exercise, our team thought it would be best to standardize the frequency of courses and field locations as a planning tool. We compiled and reviewed training data trends, and as a result, have come up with a standardized plan. This allows our customers and partners to better plan for their employees' training needs and to assist them as they mentor employee performance. Our training sessions are listed in the LMS and publicized every two weeks in the Buyers' Digest; this standardized calendar will allow for performance optimization.



Note: If you need immediate system access based on personnel actions, please send a request for **Contingent Approval for System Access** to process.improvement@doas.ga.gov. APOs/CUPOs must mentor their staff and ensure that staff members with contingent approval are registered for and complete training within agreed timelines.

Listed below are the outcomes of the training calendar process-mapping:

- Training calendar will be distributed annually on second Thursday in June
- Full-training schedule will begin the first Monday in August and cease the Thursday before Memorial Day
- Thanksgiving week will be left open for ad-hoc classes
- No regularly-scheduled training the last two weeks in December and the first week in January
- Regular training schedule will resume the second Monday in January
- Reduced-training schedule from June 1-July 31. This time will be reserved for high-demand courses, ad-hoc courses and administrative updates for systems and policies, staff development, cross training for trainers, and training in-service

The table below shows the frequency of courses:

Team Georgia Marketplace (TGM)	
eProcurement for Requestors	2x/month Atlanta, 1x/month Field
eProcurement for Buyers	1x/month Atlanta, 1x/month Field
Strategic Sourcing	1x/month Atlanta, Field every other month
Supplier Contracts Management	1x/month Atlanta, Field 2x/year
Procurement	
Fundamentals of State Purchasing	2x/month Atlanta, 2x/month Field
Basics of Writing Specifications	2x/month Atlanta, 2x/month Field
Basic Fundamentals of State Purchasing	1x/month Atlanta
eSource for RFQs	1x/quarter (Alternate between Atlanta/Field)
How to Conduct a Self-Audit (Compliance)	At least 1x/quarter Atlanta
RFP Courses	1x/quarter (Alternate between Atlanta/Field)
Contract Management (CM)	2x/quarter (Alternate between Atlanta/Field)
Negotiations (APO/CUPO or designee only)	2x/year Atlanta
Evaluating P-Card Program Management	2x/quarter (1 Atlanta 1 Field)

Field Locations

We have added two regional locations to our training calendar for FY17-19. We will now travel to North Georgia and Columbus as part of our regular rotation. Specific locations and addresses are listed in the LMS.

Table Legend: P=Procurement; TGM=Team Georgia Marketplace™; CM=Contract Management; PC=P-Card

Macon: August (P/TGM/PC), October (P/TGM), January (CM), February (RFP), March (P/TGM/PC)
Albany: November (P/TGM), January (P/TGM), February (TGM)
Augusta: November (P/TGM), March (P/TGM/CM)
Savannah/Statesboro/Brunswick: September (P/TGM), October (CM), December (P), April (P/TGM)
Valdosta: September (P/TGM), January (TGM), February (P)
North: Kennesaw/Dalton/Dahlonega/Gainesville: August (P/TGM/RFP), October (P/TGM), December (PC), February (P), May (PC)
Columbus: January (P/TGM), May (P/TGM)



Training Processes Updates

There are several processes that have been modified and SPD wants to ensure you are aware of our training processes as you utilize procurement training resources.

- **How do I request access to the Learning Management System (LMS)?**
 - To gain access to the Learning Management System (LMS) send an email to training@doas.ga.gov including your name, email address and employee ID number. Also indicate if you are pursuing a GCPA certification and you will be given access within 2 business days. You will receive confirmation once you have access to the LMS.

- **What if I have a large number of staff requiring training or cannot attend regularly scheduled sessions?**
 - If a large number of your staff needs to be trained and we are not due to travel to your area, you can request ad-hoc training outside of our regularly scheduled sessions by emailing training@doas.ga.gov.

- **What do the following abbreviations in course titles mean – L, T, W?**
 - L = Lecture-Based; T = Test; W = Web-based/Online

- **Can I enroll in one session, then switch to an earlier session if a spot becomes available?**
 - Yes

- **When can I sit for an exam?**
 - You can take an exam immediately after the course or request through the LMS. **Exams will no longer be proctored** and students have the option to take the exam immediately after class or request the exam through the LMS. Instructions on how to request the exams are included

- **What do I do once I pass exams to gain TGM access?**
 - Submit the certificates for the required classes to the PeopleSoft Administrator at your agency.

- **How do I enroll TGM approvers and what's the process for taking the class?**
 - To be enrolled in the eProcurement for Approvers Online Course, users will need to view the available class session dates in the LMS. Once you have selected a date contact your respective Business Advisor with your desired session date, email address, and employee ID number. All course sessions are from 9:00AM - 5:00PM. You may start any time after 9:00AM and complete by 5:00PM. Business Advisors should then send an email with the enrollment request to training@doas.ga.gov. Users will receive an email with course instructions the morning of the course session. If you have any questions, please send an email with the subject "eProcurement for Approvers Online Inquiry" to training@doas.ga.gov.

- **What should go to my APO/CUPO for processing if I have not completed the RFP certificate?**
 - Any RFP, RFQC, or RFI solicitation. Please refer to Table 8.4 of the GPM specifying that only those with their RFP Certificate should be posting and conducting these types of solicitations
 - Any Sole Source or Consortia purchase should be reviewed by the APO/CUPO; in many cases only the APO/CUPO should be responsible for posting and managing this type of event
 - Any request for Sole Source purchases in excess of \$500,000.00 will require approval from Agency Sourcing Division. Forms should be sent to agency.sourcing@doas.ga.gov
 - Any request for waiver, special approval, or exception should be routed through the APO/CUPO to process.improvement@doas.ga.gov
 - Any request for One Time Request to Exceed DPA is routed through the APO/CUPO to CCMRouting@doas.ga.gov

Note:

1. If you are functioning as APO/CUPO and have not yet completed your RFP Certificate: You should send in a request to the Agency Sourcing Division (agency.sourcing@doas.ga.gov) for assistance with posting an RFP, RFQC, or RFI and further direction.
2. If you have recently been appointed to the position of APO/CUPO, you must submit the appropriate paperwork through process.improvement@doas.ga.gov and complete any certificates or additional training as instructed by State Purchasing.



Who Takes What for Team Georgia Marketplace™ System Access?

There are many roles in procurement and SPD has training for each type of procurement professional. Please review the required training per role for Team Georgia Marketplace™ system access.

P-Card Administrator & Voucher Training	<ul style="list-style-type: none"> • A request must be sent to MuKesh Patel to request a training session. • mukesh.patel@doas.ga.gov
P-Card Holder	<ul style="list-style-type: none"> • Introduction to Purchasing Card Principles (6600W) & Test (6600T) • Purchasing Card (TGM100W) & test (TGM100T) *only if the holder's card will be used in the TGM System
Requestor	<ul style="list-style-type: none"> • Navigation (TGM10W) • eProcurement for Requestors (TGM20L) & Test
Requisition Approver	<ul style="list-style-type: none"> • Navigation (TGM10W) • eProcurement for Approvers (TGM30W) & Test (TGM30T)
P-Card Approver	<ul style="list-style-type: none"> • Navigation (TGM10W) • eProcurement for Approvers (TGM30W) & Test (TGM30T) • Purchasing Card (TGM100W) & Test (TGM100T)
P.O. Buyer	<ul style="list-style-type: none"> • Introduction to State Purchasing (1000W) • Navigation (TGM10W) • Basics of Fundamentals of State Purchasing (1015L) or Fundamentals of State Purchasing (1010L) *choose this option if also pursuing a GCPA • eProcurement for P.O. for Buyers (TGM40L) & Test (TGM40T)
Sourcing Event Buyer (posts solicitations)	<ul style="list-style-type: none"> • Introduction to State Purchasing (1000W) • Navigation (TGM10W) • Fundamentals of State Purchasing (1010L) • eProcurement for P.O. for Buyers (TGM40L) & Test (TGM40T) • Basics of Writing Specifications (3000L) • Strategic Sourcing (TGM50L) & Test (TGM50T)
Contract Officer	<ul style="list-style-type: none"> • Introduction to State Purchasing (1000W) • Navigation (TGM10W) • Fundamentals of State Purchasing (1010L) • eProcurement for P.O. for Buyers (TGM40L) & Test (TGM40T) • Basics of Writing Specifications (3000L) • Strategic Sourcing (TGM50L) & Test (TGM50T) • Supplier Contracts Management (TGM60L) & Test (TGM60T)

Training Policies Review

The Georgia Procurement Manual (GPM) serves as the reference for purchasing policies in the state of Georgia. Section 8.4 Training and Professional Development, outlines policies for purchasing training in the areas of certification programs, training registration, no-show to training sessions, and re-certification. This section of the Digest provides additional insight into these policies.

Certification

State Purchasing Division (SPD) has established the Georgia Procurement Certification Program which identifies minimum skill sets and training requirements necessary to complete procurement tasks. Certification is beneficial for individuals who wish to validate their own skills and performance levels and that of their employees. For optimum benefit, the certification tests reflect the critical tasks required for a job, the skill levels of each task, and the frequency by which a task needs to be performed.

In addition, it is the intention of the State Purchasing Division’s Deputy Commissioner to delegate purchasing authority to the maximum extent possible. This is determined by the assessment and certification of the enterprise’s procurement staff. These are generally determined by experience, training, and proven ability to successfully provide best-in-class purchasing services to the state.

SPD offers three (3) specialized certifications as shown in the table below*.

Title	Components of Certification	Audience
Georgia Certified Purchasing Associate (GCPA) or Basic Certification	Basic Certification	Employees who need basic understanding of State procurement tools, procedures, and policies and will be creating Request for Quotations solicitations.
Georgia Certified Purchasing Manager (GCPM)	GCPA	Employee must complete GCPA Basic Certification prior to being eligible to pursue GCPM status.
	RFP Certificate	Employees responsible for writing and managing the RFP process.
	RFP Negotiations course	All employees are not required to take this course for GCPM Certification. APOs/CUPOs alone will have the authority to conduct Negotiations on behalf of the State Entity and will be required to complete this course.
	Contract Management course	Employees responsible for writing and administering the contracts.
Georgia Certified Purchasing Card Administrator (GCPCA)	P-Card Certification	Employees whose responsibilities include coordinating and administrating the P-Card Program at their facilities (P-card Administrators only).

* Additional information can be found in the Georgia Procurement Manual (GPM) in Section 8.4 Training and Professional Development.

* For questions, please contact Training & Outreach at training@doas.ga.gov.

Recertification

Recertification includes activities and training courses designed to certify employees due to the availability of new tools or changes in procedures or policies. The goal of recertification is for the employee to stay abreast of current trends in purchasing, so consider exploring external sources in addition to SPD training courses. In order to receive recertification, certified employees must earn at least 40 hours of Continuing Education Units (CEUs) over a 5-year renewal period. Recertification units can be obtained from SPD or from **an accredited purchasing organization**.

CEUs can be obtained from **SPD** by completing the following:

SPD training courses	Retake any SPD course that you initially took to complete your certification (GCPM, GCPA, GCPCA), AFTER two (2) years, and you will receive CEUs for retaking those classes. No exam is required when retaking these courses as refreshers after two (2) years.
SPD-hosted webinars	GPM Changes – SWC Announcements – SPD Policy Updates – SPD Training Updates

- Once the GCPA certification is earned, classes that would fulfill the GCPM certification will not count as CEUs toward recertifying for the GCPA. They will count, however, toward receiving your **initial** GCPM certification.
 - **Exception:** If there are courses that are needed for job performance that are in the GCPM learning path, but the employee is not pursuing the GCPM certification, special approval is required from SPD training for those courses to count toward GCPA recertification.
- Once you have earned your GCPM certification, all system-related SPD courses will count toward recertification. You will **not** need to recertify your GCPA once you have earned your GCPM, but must maintain your GCPM certification.
- For the **GCPCA** certification, only the following job functions are eligible for (re)certification:
 - APO/CUPO
 - Card Program Manager/Administrator
 - Card Program Coordinator
 - Internal Audit Staff who perform card audits

NOTE: The following job functions are **not eligible** for the GCPCA:

 - Cardholder
 - Cardholder supervisor (unless s/he performs one or more of the above job functions)
 - Accounts payable
 - Any other job functions not listed above
- All CEUs that are offered by SPD will be tracked for each student in the LMS. To receive CEUs for recertification, the student must be registered as an attendee and attend the sessions listed above.
- For CEUs that are earned from external sources, the student must keep track of his or her own data, and submit either certificates of completion or a [Continuing Education Units Attendance Record form \(SPD-OP011\)](#) with the [DOAS Application for Re-Certification \(SPD-OP010\)](#).

No-Show and Late Attendance Policy

We understand that periodically emergencies arise, and we work with students as much as possible. However, we have had to implement the following policies for no-show/late attendees.

- A No-Show is any student registered for a training class that drops the class with less than 72-hours' notice. The \$30.00 No-Show fee will be collected at the end of each week and submitted to the state entity for payment. The billing statement will be identified as SPD Training No-Show in the description and contains a list of all students from the entity who registered for a training class and did not attend. **The assessed No-Show fee(s) must be paid before the student can register for another training class.**
- Our LMS will now show a screen that displays after the student selects the Enroll button, outlining the training policy and allows the student to accept or decline the terms. If the student accepts, he/she will be enrolled in the training session. If the student declines, he/she will not be registered for the training class.
- Late attendance policy: For students arriving late to any class, the student must arrive within 30 minutes of the class start time in order to be eligible to complete the class. Otherwise, the student will be charged a No-Show Fee and will need to re-enroll for the class to be taken at a later time.

Certification Exam Policy

- Registrants will have three attempts to pass an exam. If student fails on the third attempt, the course must be retaken.
- Students have ten business days after completion of course to complete the exam process (up to three attempts). Failure to complete the exam will be considered in the same manner as three failed attempts, and will result in the need to retake the course.

Contact Information

SPD Training Division can be reached by emailing training@doas.ga.gov or calling (404) 656-5339.

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