

## **Working *DRAFT* – Step-by-Step Guide to DVR Training Grant Processing In-State Public and Private Non-Profit Schools (September 2015)**

### **STEP 1**

#### **Spring 2015:**

- 1) After June 1, DVR secures signature on new academic year print version of DVR training grant (TG).
- 2) DVR staff checks the Fiscal Summary page for previous unverified TG direct payments to the consumer and resolves these prior to continuing.
- 3) After July 1, DVR can begin to send electronic version TG to school for initial processing, using the Payment Guide for specific school instructions.

### **STEP 2**

#### **Before Fall Term Starts:**

- 1) FAO sends DVR grant back to DVR.
- 2) DVR staff enters Authorization for Services casenote in IRIS if not already complete.
- 3) DVR sends via email with an estimated training grant amount (including in comments if there is a DVR exception or SSI/SSDI offset) to the FAO *prior* to the start of the term. This is done even if the estimated amount is \$0.

### **STEP 3**

#### **After Census Date:**

FAO sends via email to DVR, a confirmed TG dollar amount, credit load amount, remittance information/ address and DVR student and term identifier to DVR within 7 calendar days after the census date.

### **STEP 4**

#### **Upon Confirmation of Credits and Amount:**

DVR local staff creates a purchase order made to the school. Including:

- 1) School name and remit address (Refer to Payment Guide).
- 2) Consumer name.
- 3) Review fiscal summary for prior payments to insure it is not duplicative.
- 4) Amount of TG (within DVR guidelines for payment).
- 5) Coded to: 052 (4 yr. College/University), 022(2 yr. Technical/Associates), 021 (Graduate) or 063 (Occupational/Vocational Training)
- 6) Information regarding any exception requests and proper supervisory review and authority to complete for additional funding.
- 7) Similar to an OJT, complete receiving right away and forward PO # and TG form to mailbox - DWD MB DVR Vendor Invoices. DO NOT FAX. Start the subject line of the email with "TG Consumer First Name/Consumer Last Name" to indicate this is a TG payment.

#### **CCP reviews:**

- 1) Authorization of services.
- 2) School name and address.
- 3) Consumer name.
- 4) Review fiscal summary for prior payments to insure it is not duplicative or incorrect.
- 5) Amount of grant is calculated and within DVR guidelines for payment.
- 6) Coding is reviewed for grant.

- 7) If exception request has had proper supervisory review and authority to complete for additional funding and is included in the TG comment box.

CCP enters Payment to School and assigns identifiers:

- 1) Purchase Order number is entered for consumer and school.
- 2) Invoice number with 12 characters is assigned to payment request and printed on check stub. Invoice number will be entered as Student ID and term (Ex. 0123456 FA15).
- 3) Remittance advice with up to 25 characters is entered for check stub information. Remittance advice will be entered as last name, first name, and term.
- 4) Check Stub to FAO for term may have up to 49 Consumer payments listed.
- 5) Payment will be made to school within 5-7 business days from receiving grant request.

### STEP 5

#### Upon Receipt of DVR Payment:

Bursar's office applies funds to student account and provides excess funds direct to student, if applicable.

### STEP 6

#### End of Semester

School sends via email Unofficial Transcript from School to DVR staff identified in the DVR TG information form if possible. DVR Reviews grades and credit load and adjusts funds paid to the next term. This is done on a case by case basis.

### STEP 7

#### Next Term

If the student continues, complete the following steps for the next term:

- 1) For second term, all DVR staff should send a TG form via email to the respective schools for confirmation of the second term credits.
- 2) Prior authorization for the second term TG must be in the file prior to school resuming. If second term prior authorization was not included in the initial authorization, amend the first term authorization through use of the "Add Authorization for Services Update" button.
- 3) The school will provide a confirmed amount after the census date. Please process payment at this time using the confirmed amount. Remember to update the authorization if the amount differs from the prior authorization.
- 4) Payments should be made using the steps below:

TYPE OF PAYMENT	PROOF OF PAYMENT	SCHEDULE	GRADES	TIMEFRAME
Direct to <b>in-state public school</b> or <b>approved private (WAICU)</b> via: <b>purchase order/receiving/expedited payment check</b> via CCP	School provides via confirmation of TG	School provides	School or student provides	<b>After census date</b> (usually 10 days into semester)
Direct to <b>non-FAO, non-WAICU private or out-of-state schools</b> via: <b>purchase order</b>	School provides via invoice	Student provides	Student provides	Upon TG Completion

NOTE: You do not need to re-send an updated training grant form or copy of the Purchase Order to an in-state public school or WAICU school after the confirmed credit amount for second term has been received from the school.