

Training Grant Procedural Checklist for DVR Staff

FAFSA-Eligible Wisconsin Non-System or Out-of-State Post-Secondary Schools

- Send out the [Responsibility Checklist for DVR Consumers Applying for a DVR Training Grant](#) and the Training Grant Letter available in IRIS under Case → Letters which pre-populates consumer information, staff information, and correct letterhead or [Training Grant Letter](#) (DVR-14662-E) which will require staff to input this information.
- Discuss with the consumer/student the [Administrative Review](#) process and impact on Training Grant (TG) funding.
- Complete the administrative review process, if the student elects to do so.
- Identify whether the school will accept a DVR Purchase Order for services. If the school will not accept a Purchase Order, case note verification and follow the instructions via [Direct Payment](#) steps. If the school will accept a DVR Purchase Order, the school should be in IRIS already, but if not, send school information to DVRFAO@dwd.wisconsin.gov.
- Add a new School Year in the TG Portal or select the [Training Grant Form](#) if a purchase order is not an option.
- Complete [Section 1 Consumer: DVR Information](#) of the TG form (School Information tab if completing in the TG Portal). Verify accuracy with the consumer.
- Obtain a copy of previous term grades and schedule, then attach in IRIS.
- Have student (or parent/guardian, if appropriate) sign TG form to allow for exchange of information with the school's financial aid office, academic records office, and student accounts office.

Note: Attach the signed form in IRIS if not signed in the TG Portal.

- Complete [Section 2: Financial Aid Office Information](#). Enter the FAO cost of attendance budget information, parental contribution required, financial aids (all grants and scholarships), and the credits for each semester/term using information obtained from the school or the student. Attach cost and resources documentation in IRIS. If DVR is not supporting Term 1, use the "Lock Term" button to advance the TG to Term 2.

Note: [Do not send the TG form to the school](#). Enter these numbers into the TG Portal for all terms.

- With the consumer/student, explain the TG calculations used to arrive at the grant amount using the [Understanding the DVR Grant Calculator Form](#).
 - Identify whether [Scholarships](#) awarded are need or merit-based. Take necessary steps.
 - Include Social Security offset and additional living expenses, if eligible.
 - Process any exceptions from the TG Term page.
- Authorize for tuition, books, and fees via the "Add PO" button on the Term page, which becomes enabled after clicking the "Advance Form Status for Term" button. Census dates do not apply to Non-System schools. POs should be processed in the first month of the term.
- Email, fax, or mail the purchase order to the school. The school must remit an invoice to receive payment.
- Obtain and complete appropriate verification for all support services provided.
- Obtain documentation of successful term completion and attach in IRIS.
- Repeat for Term 2, etc.