HCTC | Health Coverage
Federal • State • Private Industry | Tax Credit

HCTC State Readiness Checklist				
1. Qualify Health Plans	√	**Suggested Completion Dates***	**Supporting Documentation**	**Notes**
a. State legislation passed to support the qualified health plan(s) (if applicable)				
b. Health plans contacted		Ongoing		
c. Selected health plan(s) qualified		Ongoing	Governor's Letter (includes plan criteria)	
d. Elections letter completed and mailed to the Department of Health & Human Services (HHS)		Upon qualification	Elections Letter Template	
2. Education & Training	√	**Suggested Completion Dates***	**Supporting Documentation**	**Notes**
a. Appropriate State Workforce Agency (SWA) employees have attended a Department of Labor roundtable discussion		Roundtable sessions will be conducted for each of the DOL regions.	HCTC Training Packet	
b. HCTC documentation reviewed on IRS.gov website		Ongoing	www.irs.gov (Enter Keyword HCTC)	
3. Outreach to HCTC Eligibles	√	**Suggested Completion Dates***	**Supporting Documentation**	**Notes**
a. State website updated with HCTC information		Ongoing	HCTC Training Packet	
b. HCTC brochures made available to potential HCTC eligibles		July 2003	HCTC Training Packet	
c. One-stop career center personnel trained		July 2003	HCTC Training Packet	
d. Rapid Response team personnel trained		July 2003	HCTC Training Packet	

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4. ICON File Transmission	√	Suggested Completion Dates*	Supporting Documentation	Notes
a.	Programming for file creation completed		6/6/03	UIPL 24-03	
b.	Record layout submitted to Lockheed Martin for certification		6/13/03	UIPL 24-03	
c.	ICON file transmission integration testing complete		6/12/03 – 7/1/03	UIPL 24-03	
d.	ICON file transmission process certified and validated for daily submission to the IRS contractor		7/21/03 - 7/31/03	UIPL 24-03	
5. NEG Infrastructure & Bridge Programs	√	**Suggested Completion Dates***	**Supporting Documentation**	**Notes**
a.	NEG infrastructure funds requested (if applicable)			TEGL 10-02	
b.	NEG bridge funds requested (if applicable)			TEGL 20-02	

* A suggested completion date may not be applicable for all checklist items.