

FSO-PVA (FOT) Course**Unit 2. Workbooks Introduction****Lesson 3. Introduction to ICA (Individual Credit Account)**

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Lesson 3: Introduction to ICA

Introduction

Lesson Overview

This lesson introduces you to the ICA (Individual Credit Account) Workbook.

Patrons with an ICA account are billed for their meal purchases at the end of the month, rather than paying for each meal at the point-of-purchase at cash register.

The ICA patron may pay their end-of-month bill by credit card or by cash. This is covered in Unit 7. Sale of Meals.

This lesson introduces the ICA Workbook, its purpose, and its forms.

Objective(s)

After this lesson, students should be able to:

- Identify ICA tabs and sections.
- Describe the ICA Form CG-3476.
- Explain how an FSO uses ICA Form CG-3476.


References

- Coast Guard Food Service Manual COMDTINST M4061.5A (series); MAR 2009
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Lesson Structure

Lesson Structure and Required Materials

This table explains how to complete this lesson. If you lack materials or experience technical difficulties, contact Lesson instructor Anthony Ciurlino at Anthony.J.Ciurlino@uscg.mil

Lesson Title	Lesson 3. Introduction to ICA (Individual Credit Account) Workbook.
Lesson Schedule	<u>Mode: Online Self-Directed</u> <ul style="list-style-type: none"> • <u>Recommended Start:</u> Day 1 by 1430 PST • <u>Complete:</u> Day 1 by 1700 PST • <u>Duration Range:</u> 30 min. – 60 min.
Paper Materials 	Paper “FSO-PVA Forms Packet” <ul style="list-style-type: none"> • Refer to paper ICA Workbook in your “FSO-PVA Forms Packet”
1. Develop Knowledge	This lesson provides an interactive eLearning presentation. Refer to the “Knowledge Development” section in this User Guide for instructions.
2. Complete Practice	There is no practice required in this lesson because this lesson focuses on prerequisite knowledge.
3. Complete Assessment	Lesson 3 objectives are assessed by Knowledge Check quizzes embedded in the interactive eLearning PowerPoint presentation.
End of Lesson Structure	

Knowledge Development: Intro to PVAISW (Key Slides)

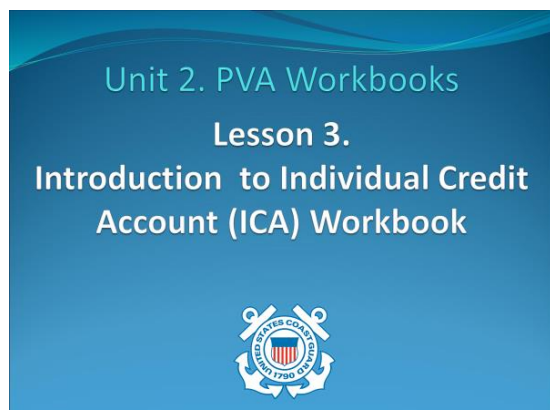
Instructions for eLearning

1. **Sound:** Turn up the volume on your computer speakers and, if applicable, Bluetooth speakers. You can always adjust the volume lower once the eLearning begins.
 - If you do not adjust the volume prior to beginning this eLearning session, you will need to close the eLearning, turn up the volume, and begin again.
2. Access your paper FSO-PVA Forms Packet and turn to the paper ICA Workbook.
3. Go to milSuite for course materials (link below):
<https://www.milsuite.mil/book/groups/fso-pva-course>
4. Click “Knowledge Development” link under Unit 2, Lesson 3.
5. Click on eLearning interactive PowerPoint module listed on the screen to complete lesson 1.

As you view these interactive lectures, refer to your paper ICA Workbook for reference, and refer to the slides on the next few pages for note-taking. Jot down any questions for the instructor.


Note: Key slides featured in the above 3 modules are included below for note-taking.

Knowledge Development: Intro to ICA



For this Lesson you will need:

1. Paper FSO-PVA Forms Packet:
 - Contains paper **ICA** (Individual Credit Account) **Workbook**...
...which includes:
 - ✓ **ICA Form CG-3476**



Objective(s)

After completing this lesson, you should be able to:

- Identify ICA tabs and sections.
- Describe the ICA Form CG-3476.
- Explain how an FSO uses the CG-3476.

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Knowledge Development: Intro to ICA, Continued

What is an ICA?

- ICA stands for **Individual Credit Account**.
- Patrons with an ICA **do not pay for meals at the cash register**. Instead, they are billed at the **end of the month** for all the meals they purchased during *that* month.
- The patron is billed using the ICA (**Form CG-3476**).
- The patron pays their ICA bill using **cash** or **credit card**.

How does an FSO track and manage patron ICA data?

The FSO uses the **ICA Workbook** to track and manage patron ICA data. This lesson provides a high level introduction to the ICA Workbook, including its tabs and sections. In future lessons, you will learn how to update the ICA Workbook to track patron meal purchases and process a patron's ICA bill.

Data Tab: ICA "Data" FORM

- 1st Tab in ICA Workbook
- Enter Meal Rates & Month/Year (column B)
- Enter Unit (row 1)
- Enter patron information (columns D-I)

Data Tab: ICA "Data" Form, Cont.

Reminder about Auto-Populated Forms:

- Blue font in forms = Can be edited.
- Black font in forms = Auto-populated from other form(s) and cannot be edited.

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Knowledge Development: Intro to ICA, Continued

Sign-In Tab: ICA "Sign-In" Form

- 2nd tab in ICA Workbook
- Patron names auto-populated from Data form.
- Mark daily meals purchased per patron
- Total meals per day auto-calculated columns A-G.

The screenshot shows the 'Sign-In' tab in the ICA workbook. It features a grid for marking meals purchased per patron. The grid has columns for days of the week (A-G) and rows for patrons. A summary table at the bottom right shows totals for each patron. A red arrow points to the 'Sign-In' tab in the workbook's tab bar.

Individual Credit Account (ICA) Form CG-3476

The screenshot shows the ICA Form CG-3476. It is a form used to record meals purchased by a patron. The form has a header section for patron information and a main table for recording meals. A red box highlights the 'ICA 1' tab in the workbook's tab bar.

Purpose of ICA Form CG-3476:

- Records all meals purchased in one month by a patron who has been authorized an individual credit account (ICA).

FSO use of ICA Form CG-3476:

- FSO updates CG-3476 at day's end using meal purchase data listed on the printed CG-4901 "Meal Sign-In Sheet".
- At month's end, FSO bills individual patrons IAW each patron's ICA total, then files paper ICA forms in left side of Monthly Folder.

Individual Credit Account

- Your ICA workbook uses the information entered in the Data form and Sign-in form to automatically generate an ICA (or bill) for each patron.

The screenshot shows the ICA Bill form. It is a form used to generate a bill for each patron. The form has a header section for patron information and a main table for recording meals. A red box highlights the 'ICA 1' tab in the workbook's tab bar. A red arrow points from the text 'generate an ICA (or bill)' to the 'ICA 1' tab.

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Knowledge Development: Intro to ICA, Continued

ICA: Billing Process

- FSO presents the ICA to each patron at end of month.
- Patron has 5 working days to pay.
- All ICA corrections must be made by revising the Data Form and/or the Sign-In Form information.

Knowledge Check: ICA Form

Instructions: Click on the answer you believe is correct.

1. What is the purpose of the ICA form CG-3476?

- ☒ A. Records all meals purchased in one day by a patron who has a credit account
- B. Records all meals purchased by a patron who has SIK credit.

2. How does the FSO update the ICA at day's end?

- ☒ A. An FSO updates the ICA at day's end using meal purchase data from the PVAISW's CG-4901 Meal Sign-In Sheet.
- B. An FSO updates the ICA at day's end by accessing previous month's CG-2576 for meal purchase history of patrons with ICA accounts.

3. What are the tabs in the ICA form CG-3476?

- A. Data Form, Sign-In Form, and the PVAISW, which auto-populates the ICA bill.
- ☒ B. Data, Sign-In, and numbered patron tabs ICA 1, ICA 2, etc., which are automatically generated to produce a bill for each individual patron.

Summary and Review

Please send email to instructor if you have any questions.

This lesson presented and assessed these skills:

- Identify ICA tabs and sections.
- Describe the ICA Form CG-3476.
- Explain how an FSO uses the CG-3476.

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Knowledge Development: Intro to ICA, Continued

Congratulations!

You have finished Lesson 3,
“Introduction to the ICA Workbook.”

In future lessons you will learn about
and practice the ICA billing process
and ICA update procedures.