

Accounting Department (AR) 1st Month Objectives

Mentor's Name: _____ Employees Name: _____

Hire Date: _____ Title: _____

Training Requirement	Initials or (N/A)
Ability to locate resources in the MGE Portal	
Train employee on how to access and navigate the MGE portal	
Train employee on how to locate and save documents and forms	
Ability to locate resources in the One drive.	
Train employee on how to locate the one drive and what information can be found	
Ability to locate resources in SharePoint.	
Train employee on SharePoint and how to locate and store information	
Ability to navigate and locate resources in Teams	
Train employee on how to create and join calendar events in Teams	
Train employee on how to create a chat and video call in Teams	
Train employee on how to store and locate documents in Teams	
Ability to navigate Outlook	
Train employee how to locate personnel through Outlook	
Train employee on creating signature in Outlook	
Train employee on creating inbox folders and rules in Outlook	
Train employee on creating calendar events in Outlook	
Train employee on archiving and email management	
Ability to submit a receipt	
Train employee on the process of submitting receipts to AP.	
Ability to complete Weekly Safety Meetings	
Train employee on how to locate and complete weekly safety meetings and the requirement to complete them	
Ability to Update Employee information (I.E. Address, phone number etc.)	
Train employee on how to update employee information	
Ability to request time off/sick time	
Train employee on how to request time off/submit for sick time	
Ability to request resources (Keyboards, monitors, etc.)	
Train employee on how to request asset resources.	
Heavy Job	
Completed Heavyjob Trainings	
Viewpoint	
Completed course training in viewpoint	
Completed accounting mod review	
Completed AR mod review	
Completed AR statement reports	
Completed AP report	
Completed PM Contracts module review	
Completed JB Progress Bill review	
Completed JB Interface review	

AR Tracker	
Obtained AR tracker access	
Completed AR tracker review	
PreBill	
Shadowing on prebill process	
Example:	
Private Work	
Shadowing on Prelien process	
Completed preliminary request process	
Example:	
Shadowing on billing process	
Example #1:	
Example #2:	
Understanding of bill request template	
AT&T	
Understanding of billing process	
Understanding of bill request template	
PG&E	
Understanding of requirements	
Understanding of all PG&E work types	
Understanding of spreadsheet	
Understanding of bill request template	
Understanding of billing requirements (review of PowerPoint and spreadsheet)	
PG&E Billing	
Basic understanding of equipment	
Understanding of material and yard costs	
Understanding of crew make up requirements	
Example #1:	
Example #2:	
Understanding missed meal requirements	
Job example:	
Basic understanding of LM&E form	
Example:	

Basic understanding of RFP	
Example:	
Understanding of proposals	
Example:	
Understanding of bill spreadsheet	
Field Trip	
Completed an escorted field outing to observe job	
PG&E Contacts	
Reviewed PG&E and line of business matrix	
PG&E Divisions and Cities	
Reviewed PG&E divisions and city lines	
Purchase Orders	
Understanding of purchase orders	
Rates	
Understanding of rates	
PG&E MAT codes	
Understanding of PG&E MAT codes	
AR email inbox	
Understanding of navigation of AR email inbox	
Billing inbox	
Understanding of navigation of Billing inbox	
Partial bill vs Final bill	
Basic understanding of the difference between a partial and final bill requirements	
Example:	
CWA tracker	
Reviewed CWA tracker	
AR meetings	
Attended at least one AR meeting	
Additional Training Provided:	
1.	
2.	
3.	
4.	
5.	

