

Accounting Department (AR) 2nd Month Objectives

Mentor's Name: _____ Employees Name: _____

Hire Date: _____ Title: _____

Training Requirement	Initials or (N/A)
Heavy Job	
Understanding of heavyjob timecard	
Understanding of heavyjob diary	
Daily Hours Work Report	
Understanding daily hours work report Example #1: Example #2:	
Viewpoint	
Completed JC Detail review	
Completed JB Progress Bill review (if not completed in the last 30 days)	
Completed JB Interface review (if not completed in the last 30 days)	
PreBill	
Shadowed on prebill process Example:	
Private Work	
Shadowed on Prelien process	
Shadowing on lien process Example:	
Understanding of waiver process Example:	
Shadowed on billing process Example #1: Example #2:	
AT&T	
Ability to complete billing process	
PG&E	

Understanding of billing requirements (review of PowerPoint and spreadsheet)	
Field Trip	
Completed an escorted field outing to observe job	
Collection Calls and Emails	
Shadowing examples of how to handle collection calls and emails	
Example #1:	
Example #2:	
Contract Adjustments	
Shadowing of contract adjustments	
Change Orders	
Shadowing of change order process	
Partial bill vs Final bill	
Ability to explain and demonstrate the difference between a partial and final bill requirements	
Example:	
CWA tracker	
Ability to explain CWA tracker	
Unifier	
Shadowing and basic understanding of unifier	
Example #1:	
Example #2:	
High Speed Rail Waivers	
Basic understanding and shadowing high speed rail waiver process	
Aging Invoice	
Basic understanding and shadowing aging invoice email reminder process	
Certificate of Insurance	
Basic understanding and shadowing certificate of insurance process	
Additional Training Provided:	
1.	
2.	
3.	
4.	

5.	
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