IDP’s identify the proficiencies necessary and the trainings and development activities provided, and documents progress toward meeting goals necessary to advance to the Professional 2 level. Regular meetings with the employee are recommended, with formal check points at 3, 6, 9, 12 and 18 months.  
***Note: Completion of the training period does not trigger auto-reclassification to the P2 level. Departments must submit a request for reclassification through OACIS. The final effective date of an approved reclass is the first day of the pay period following receipt of a complete request.***

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Employee Name:  Jamie Jones | | Supervisor Name:  Suzy Supervisor | | | Department:  Finance | | | |
| Current Title (P1):  Financial Services Analyst 1 | | Probationary Status Ends:  1/15/2019 | | | Readiness at the P2 level Demonstrated On:  Click or tap to enter a date. | | | |
| P2 Level Proficiencies (Behavioral, Functional, Technical, etc.: *Demonstrates readiness at the P2 level.*   1. Ability to research and successfully resolve financial discrepancies between GL and shadow system. 2. Prepares financial reports, including analysis and summaries of financial transactions for management review and supporting strategic decision making. 3. Reviews financial transactions for regulatory compliance, identifies issues and recommends solutions 4. Participates in internal records audits, ensures internal controls are addressed, and resolves issues to protect University resources. 5. Correctly interprets policy and advises customers on existing processes and practices. | | | | | | | | |
| **Cmp**  **(#)** | **Development Plan**  List any work assignments and activities that support the development of skills, knowledge & proficiencies required at the P2 level. | | **Expected Outcome**  Describe the successful completion of activities and how proficiency will be demonstrated. | | | Req.-Pass Probation  **(Y/N)** | **Milestone Target Date** | **Achieved**  **Date** |
| **1** | Scheduled trainings with others in unit to review financial transactions against GL to learn internal resources, processes and practices. | | Demonstrates solid understanding of financial processes and the ability to independently review transactions, identify issues, and either resolve or make appropriate recommendations to achieve resolution. | | | Yes | 9/30/2018 | Date |
| **2** | Completes online software report developer courses (12 hours). | | Learns software reporting concepts and is able to demonstrate ability to generate queries and create and format required reports. | | | Yes | 10/31/2018 | Date |
| **2** | Scheduled trainings with others in unit to develop skills in custom reporting, analysis, and developing final reports that include analysis and recommendations. | | Demonstrates ability to run reports, analyze data, prepare summaries, and make recommendations independently. | | | Yes | 11/30/2018 | Date |
| **3** | Scheduled trainings with manager on regulations and compliance; follow up by working with others in unit to understand issues and processes for resolving issues. | | Demonstrates ability to independently review transactions for regulatory compliance, identify issues, and resolve or make recommendations. | | | No | 2/15/2019 | Date |
| **4** | Participates in campus audit training (class offered annually). | | Applies audit training concepts at fiscal close to pre-audit financial records and take corrective action. | | | No | 4/30/2019 | Date |
| **5** | Independently reviews internal and UC policy documents. Works with others in unit to discuss policy interpretation prior to advising customers (ad hoc). | | Demonstrates a solid understanding of local and UC policy and practice; able to independently interpret and advise on policy. | | | No | 6/30/2019 | Date |
| **Resources:** List any resources that will be utilized to contribute to development activities.  Online software reporting training; annual audit training class; one-on-one training and mentoring with others in unit and Manager. | | | | **Supervisor Notes:**  Click or tap here to enter text. | | | | |
| **Employee Signature: Date:** | | | | **Supervisor Signature: Date:** | | | | |