

On the Job Training (OJT) Action Plan - SAMPLE

The purpose of this document is to instruct the OJT trainer on how to complete this form. Sample language is *italicized*.

Trainee Name: Jane Doe Classification: Personnel Specialist Working Title: Personnel Officer

OJT Trainer Name: Trish Talented Classification: Staff Services Manager II Working Title: Personnel Officer

OJT purpose: *The purpose of this OJT is to document Jane's training as identified in the "Training Topics" section below.*

| Start and end date | Training Topics | Steps and method used to train each topic | Total hours used to train this topic |
|--------------------|---|---|--------------------------------------|
| 2/23/15 | 1.Process personnel and benefits transactions | 1.1 –Trainer – Provided training on how to navigate State Controller's Office (SCO) computer system and how to key master payroll exceptions. Task performed to validate learning - Trainee successfully keyed master payroll SCO's computer system. | 3 |
| | | 1.2 Trainer – Provided training on how to navigate SCO's computer system and how to key benefit transactions. Task performed to validate learning -Trainee keyed benefits transaction into SCO's computer system. | 2 |
| 2/18/15 | 2. Disability Leave Requests | 2.1 Trainer – Provided training on how to process Non-industrial Disability Insurance (NDI) leave requests. Task performed to validate learning - Trainee was provided with a mock NDI claim. They successfully analyzed the key points and recommended whether leave was warranted based on claim information submitted. | 1 |
| | | 2.2 Trainer – Provided training on how to key NDI leave. Task performed to validate learning – Trainee reviewed a mock NDI leave request and was able to identify key data and supporting documentation needed for approval. | .5 |

| Start and end date | Training Topics | Steps and method used to train each topic | Total hours used to train this topic |
|---------------------------|------------------------------|--|---|
| | | <i>2.3 Trainer – Trained on how to process Industrial Disability Leave (IDL) payments. Task performed to validate learning -Trainee successfully processed an IDL leave payment.</i> | .5 |
| 3/05/15 | 3. Monthly attendance | <i>3.1 Trainer – Trained monthly attendance reconciliation. Task performed to validate learning – The trainee successfully reconciled monthly attendance for two CalHR programs.</i> | .5 |
| | | <i>3.2 Trainer – The trainee was shown how to enter leave into SCO’s system. Task performed to validate learning – I supervised the trainee successfully entering leave into SCO’s system.</i> | 1.5 |
| 1/16/15 | 4. Information Dissemination | <i>4.1 Trainer – The business services office provided training to the trainee on mail dissemination. Task performed to validate learning –The business services office had the trainee sort and distribute a box of mail, which was successfully distributed to the Personnel Office staff.</i> | .5 |
| | | <i>4.2 Trainer – I provided the trainee with a folder which shows how orientation packages should be assembled. Task performed to validate learning -Trainee successfully assembled 30 orientation packages for September’s New Employee Orientation.</i> | .5 |
| | | <i>4.3 Trainer – Trained on how to answer telephone and email questions to assist personnel related questions. Provided a job aid on how to structure emails and a check list which identified talking points on the 10 most pressing personnel issues. Task performed to validate learning – I observed the trainee responding to inquiries using the check list and job aid which were provided in the training.</i> | 1 |
| 1/19/15 | 5. Records Retention | <i>5.1 Trainer – Reviewed the records retention schedule with the trainee. Task performed to validate learning – The trainee sorted 10 years of records into purge and archive boxes. A random check of both boxes indicated a moderate level of errors. I reviewed the employee records retention schedule with the trainee again and cleared up any questions.</i> | 1 |

| Start and end date | Training Topics | Steps and method used to train each topic | Total hours used to train this topic |
|--|-----------------|--|--------------------------------------|
| | | 5.2 Trainer - The trainee was shown how to box files for archive storage. Task performed to validate learning - The trainee successfully boxed archived files identified in 5.1. | 1 |
| | | 5.3 Trainer – The trainee was shown the contact information for having files delivered to archives and was provided a job aid to show the steps involved in picking up archive boxes. Task performed to validate learning – The trainee successfully scheduled archived files to be picked up. | 1 |
| Total amount of time spent on OJT | | | 13 |

Comments about the OJT:

At the conclusion of the OJT, the trainee and trainer must sign below to certify the training is completed. A copy of this document must be provided to the trainee and placed in their training file.

Trainee Signature: _____

Date: _____

Trainer Signature: _____

Date: _____

Upon conclusion of the OJT

The supervisor below has discussed this document with the trainee and the trainer and the supervisor understands the trainee's performance level.

Supervisor Signature: _____

Date: _____