

3, 6 and 9 Month Milestones
OMF Business Operations Division Senior Administrative Specialist
Status Report

3 months
August, September, October

Key work products and projects

ACTION	STATUS	COMMENTS
Supervisor and employee have met to discuss overall responsibilities and priorities, identified essential training needs for employee.		
Have met primary customer contacts on the 12 th floor and in other groups supported by Bus Ops		
Have met primary contacts in HR Operations, HR Business Partners, HR FMLA Coordinator, Payroll, and Purchasing regarding OBPA, FMLA, and procurement activities and are comfortable reaching out to them for questions		
Comfortable and proficient at covering the front desk and familiar with requirements for doing so – greeting and directing walk-in customers, phone management, mail handling, conference room booking/resolving appointment conflicts		
Comfortable and proficient at processing personnel actions required for hiring and separating employees (remaining actions in the 6 month timeframe)		
Comfortable and proficient at processing FMLA requests for non-intermittent leave (remaining leave processing expected in 6 month timeframe)		
Comfortable and proficient at Purchase Requisition, Purchase Order, and Receiver creation and modification		
Personnel files for <i>insert customers</i> have been		

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ACTION	STATUS	COMMENTS
audited and updated using the Personnel File Checklist		
Others as assigned		

Background and knowledge gained

ACTION	STATUS	COMMENTS
Schedule required HR 2.02 Training and complete Mandatory Child Abuse Reporting training within first 60 days of employment		
Attend Benefits orientation		
Review Intro to SAP and Basic SAP Navigation Course online		
Review Employee Self Service trainings and job aides online		
SAP training for the following assigned roles is completed (if available): <i>insert SAP roles</i>		
Briefing on Public Records, Media contact, Legal Holds, etc. as handled in OMF		
Defensive Driving course completed		
Familiar with where to find HR admin rules, purchasing rules, personnel administration guidelines & FMLA rules		
Familiar with City and OMF retention schedules		
Training and access to search for and add records to TRIM and e-Files (City archiving system)		
Familiar with OMF goals, strategic plan		
On the job training as needed in FMLA with Judy Bishop (BHR)		
On the job training as needed in personnel		

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ACTION	STATUS	COMMENTS
transaction processing with HR Business Partner		
On the job training as needed in purchasing roles		
Begin regular attendance of OBPA user group meetings		

6 months
November, December, January

Key work products and projects

ACTION	STATUS	COMMENTS
Comfortable and proficient at processing all personnel actions for assigned groups and as backup		
Comfortable and proficient at processing all FMLA/OFLA requests for assigned groups and as backup; able to assist during busy calendar yearend		
Comfortable and proficient at purchasing contract creation and modification and purchasing transactions for advances		
Comfortable and proficient at making/tracking Facilities Requests and coordinating projects and moves for the 12 th Floor		
Comfortable and proficient at making/tracking Phone Requests for the 12 th Floor		
Comfortable and proficient at making/tracking Technology Requests for the 12 th Floor		
Comfortable and proficient at ergonomics coordinator activities for the 12 th Floor		
Familiar with worker's compensation notification filing and unemployment claim response/tracking/filing		

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ACTION	STATUS	COMMENTS
All personnel files for which Admin Team is responsible have been audited and updated using the Personnel File Checklist; deficiencies found in prior reviews have been corrected		
Training files are updated and complete for Business Operations Division & CAO employees; a process for regular reporting a tracking of required training is implemented		
Process is developed, documented, and implemented for regular updating of division reference file index and archiving records in TRIM		
Others as assigned		

Background and knowledge gained

ACTION	STATUS	COMMENTS
Any other required employee training is scheduled		
Understand high level procure-to-pay process and how your roles fit in to the overall process		
On the job training as needed in FMLA with Judy Bishop (BHR)		
On the job training as needed in personnel transaction processing with HR Business Partner		
On the job training as needed in purchasing roles		

9 months

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February, March, April

Key work products and projects

ACTION	STATUS	COMMENTS
Items on Records Management Project list are completed and pass file inspections		
Develop and implement a regular schedule of records updating and inspection encompassing all Division files and requirements		
Others as assigned		

ACTION	STATUS	COMMENTS
Mandatory training as required		
Other training needs as identified		