# Sample Training Plan

**Job Title:**

Financial Practitioner II

**Job Description:**

The Financial Practitioner II, under general supervision, executes complex clerical, accounting, financial, and customer service duties in a specialized field within the Division of Finance. This position is responsible for the management of Veterans benefits for Ch. 31, Ch. 33, the Hazlewood exemption, the Military in Texas waiver for veterans and dependents of veterans, tuition and fee deferments for military-affiliated students, and processing payments and refunds to the VA for tuition and fees.

**Length of Training:**

April 25, 2025, to August 25, 2025 (17 weeks total)

## Timeline and Training Modules

### Week 1: Orientation and Introduction

#### Day 1-2: Orientation

* + Integrate SkillBridge participant into the organization
  + Overview of Texas A&M University and the Division of Finance
  + Introduction to the Veterans Affairs Office and Student Business Services (SBS)

#### Day 3-5: Job Overview

* + Detailed job description and responsibilities
  + Overview of Veterans benefits management (Ch. 31, Ch. 33, Hazlewood exemption, Military in Texas waiver)
  + Introduction to key software and tools (Microsoft Office, Banner, CRM software)

### Weeks 2-3: Veterans Benefits Processing

#### Week 2: Ch. 31 Veteran Readiness and Employment (VR&E)

* + Contract functions and setup
  + Posting benefits to student accounts
  + Invoicing and reconciliation

#### Week 3: Ch. 33 Post 9/11 GI Bill and Hazlewood Exemption

* + Contract functions and setup
  + Auditing and reviewing reports
  + Customer service and liaison duties
  + Exemption functions and setup

### Weeks 4-5: Financial Administration and Reconciliation

#### Week 4: Military in Texas Non-Resident Waivers

* + Waiver functions and setup
  + Auditing and reviewing reports

#### Week 5: Account Reconciliation and Tuition and Fee Deferments

* + Monitoring accounts receivable
  + Contacting sponsors for past due amounts
  + Deferment contract functions and setup
  + Reconciliation and customer service

### Weeks 6-7: Advanced Training and Backup Duties

#### Week 6: VA Health Sciences Professional Programs (HPSP)

* + Contract functions and setup
  + Auditing and reviewing reports

#### Week 7: Backup Duties and Other Duties

* + Training on TTPF, T3 and T5 Refund Suppress Audits, State Waivers and Exemptions
  + Fiscal Appeal Waivers, ROTC, AI Portal, and Military in Texas waivers
  + Performing other assigned duties
  + Review and assessment of training progress

### Weeks 8-17: Practical Application and Continuous Improvement

#### Weeks 8-17: Ongoing Practical Application

* + Continuous hands-on practice of all learned skills
  + Regular feedback sessions and performance assessments
  + Identifying and implementing process improvements

### Specific Training Objectives

* Proficiency in managing Veterans benefits and financial administration.
* Enhanced customer service and problem-solving skills.
* Knowledge of relevant software and tools.

### Type of Instructional Model

* On-the-Job Training (OJT)
* Virtual training (online)
* Lecture

### Instructor Qualifications

* Senior Financial Practitioner with extensive experience in Veterans benefits management and financial administration.
* Proficient in Microsoft Office, Banner, and CRM software.

### Assessments

* Standardized grading rubrics to evaluate performance.
* Regular feedback sessions to ensure training objectives are met.

### Training Outcomes

* Proficiency in managing Veterans benefits and financial administration.
* Enhanced customer service and problem-solving skills.
* Knowledge of relevant software and tools.