



## Finance Skill Standards Checklist

Student Name	School District
YA Coordinator	YA Consortium North Central Wisconsin School-to-Career Partnership
High School Graduation Date	

### Certification Areas Completed:

#### Required Skills - For EACH Pathway

#### Check completed areas

- Core Skills
- Safety and Security

### Finance

#### Business Financial Management Pathway

- Accounting Services Basic Unit
- Accounting Services Advanced Unit

#### Banking and Related Services Pathway

- Banking Basic Unit  
     \_\_ Plus minimum 7 additional Competencies
- Banking Advanced Unit  
     \_\_ Plus minimum 10 additional Competencies

#### Insurance Pathway

- Insurance Services Unit

### Level One Requirements:

*Students must complete ALL listed below*

#### Check completed areas

- Required Skills
- Minimum of ONE** Unit
- Minimum of two semesters related instruction
- Minimum rating of 450 work hours

### Level Two Requirements:

*Students must complete all listed below*

#### Check completed areas

- Required Skills for EACH Unit
- Minimum of TWO** Units
- Minimum of four semesters related instruction
- Minimum of 900 work hours

Total Hours Employed	Company Name	Telephone Number

## Instructions for the Worksite Mentor(s) and Instructor(s)

The Skill Standards Checklist is a list of the competencies (tasks) to be achieved through mentoring at the worksite.

- The worksite mentor should rate each competency as the student acquires and demonstrates the skill **according to the performance criteria**.
- A competency may be revisited and the score raised as the student becomes more proficient at the worksite.
- The mentor and student should go over this checklist together on a regular basis to record progress and plan future steps to complete the required competencies.

**I certify** that this student has successfully completed the competencies required in my department. Circle your YA role, sign and print your name, and complete with the date and the name of your department.

***SIGN this page IF you have been a mentor, trainer, or instructor of this student***

Mentor/Trainer/Instructor Signature	Mentor/Trainer/Instructor Signature
Printed Name	Printed Name
Department	Department
Date Signed	Date Signed

Mentor/Trainer/Instructor Signature	Mentor/Trainer/Instructor Signature
Printed Name	Printed Name
Department	Department
Date Signed	Date Signed

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# Operational Program Notes for Skill Standards Checklist

## 1. Finance Youth Apprenticeship Curriculum

- Definitions:
  - Competency- The worksite skill to be performed
  - Performance Standards- HOW the worksite will assess skill performance
  - Learning Objectives- Content knowledge to learn these skills; may be taught by the employer, school district and/or technical college.
  - Skill Standards Checklist- The documented list of competencies completed by the YA student
- Performance Standards & Learning Objectives are located in the **Program Guide for this Youth Apprenticeship**.

## 2. ALL Youth Apprentices **MUST** complete the Required Skills (Core Skills and Safety & Security) competencies **for EACH UNIT** they are enrolled in.

- The Required Skills competencies may be completed concurrently with the Finance Unit technical competencies.
- The Required Skills are common skills specific to all Finance sub-sectors. These skills are *aligned with* the National States' Career Clusters Foundations standards for the Finance Career Cluster.

## 3. Youth Apprenticeship choices (depending on job placement)

- Competencies have been reviewed by the Department of Workforce Development for Child Labor Laws. Contact the Department of Workforce Development's Equal Rights Division/Labor Standards Bureau at 608-266-6860 for questions regarding child labor laws.
- Students will complete a MINIMUM of one unit for a Level One Finance YA and a MINIMUM of two units for a Level TWO Finance YA.
- **NOTE: Units within each Pathway build upon each other.** Therefore, switching between pathways, after the successful completion of the first year, is allowable provided that the student begins the second year in the first unit listed under the NEW pathway choice.
- The Department of Workforce Development Occupational Certificate will indicate "Finance – plus the Name of the specific Pathway" attained when the program is completed.

## 4. Competency Ratings

- Rate the student on the competencies regularly and revisit the competencies with the student periodically to offer the opportunity for an improved rating
- Arrangements must be made to ensure that the student learns, practices, AND performs each competency **even if** that competency is not part of their regular job function
- "Entry Level" criteria should be interpreted to mean "able to do the task satisfactorily."

## Required Skills

Required of **ALL** Finance YA Students

Copy this page **FOR EACH** unit to be completed

CORE SKILLS	Minimum rating of 2 for EACH Check Rating		
	1	2	3
1. Apply applicable academic knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Apply applicable career knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Apply applicable financial industry knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Communicate effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Communicate effectively on the phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Act professionally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Demonstrate customer service skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Cooperate with others in a team setting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Think critically	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Exhibit legal & ethical responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Use technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SAFETY AND SECURITY	Minimum rating of 2 for EACH Check rating		
	1	2	3
1. Follow personal safety requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Maintain a safe work environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Demonstrate professional role in an emergency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Follow security procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Maintain confidentiality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Rating Scale:

**3** = Exceeds entry level criteria | Requires minimal supervision | Consistently displays this behavior

**2** = Meets entry level criteria | Requires some supervision | Often displays this behavior

**1** = Needs improvement | Requires much assistance & supervision | Rarely displays behavior

### Additional Comments

## Business Financial Management Pathway

<b>Accounting Services - Basic Competencies</b>	Minimum rating of 2 for EACH Check Rating		
	<b>1</b>	<b>2</b>	<b>3</b>
<b>Basic Operations</b>			
1. Maintain accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Store financial records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Assist to process checks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Process journal entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Post journal entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Balance accounts after recording transaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Assist to prepare adjusting entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Prepare worksheets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Record receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Assist to prepare financial statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Assist to process period end closing entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Fixed Assets</b>	<b>1</b>	<b>2</b>	<b>3</b>
12. Maintain fixed asset records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Assist to process asset depreciation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Assist to process depreciation budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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### Additional Comments

## Business Financial Management Pathway

<b>Accounting Services - Advanced Competencies</b>	Minimum rating of 2 for EACH Check Rating		
<b>Accounts Receivable</b>	1	2	3
1. Process customer invoices and receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Allocate receipt for invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Accounts Payable</b>	1	2	3
3. Process receiving document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Process credit memorandum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Assist to process payment authorization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Payroll</b>	1	2	3
6. Calculate employee work hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tax Reporting</b>	1	2	3
7. Assist with company tax reporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Inventory</b>	1	2	3
8. Record inventory usage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Record inventory receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Assist to physically inventory merchandise or materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Assist to process results of inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Process inventory adjustments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Cost Accounting</b>	1	2	3
13. Assist to cost account a new or revised product or service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Internal Audit</b>	1	2	3
14. Assist to audit monthly procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Budget Analysis</b>	1	2	3
15. Assist to process budget reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Banking and Related Services Pathway

Banking Basic - Required Competencies	Minimum rating of 2 for EACH Check Rating		
	1	2	3
1. Process transactions using a computer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. File transactions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Follow cash management/handling procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Teller Services	1	2	3
4. Process personal cash deposits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Process personal check deposits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Process personal withdrawals by cash	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Process negotiable instrument transactions - on-us checks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Process negotiable instrument transactions - other than on-us checks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Process transfers between accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Respond to customer account inquires and requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Perform end of day drawer balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Issue cashier's/official check	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Cross-sell financial institution products and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Banking Basic Additional Competencies	Minimum rating of 2 for EACH Check Rating		
	1	2	3
Choose <b>at least 7</b> from 21 below			
<b>Teller Services</b>	<b>1</b>	<b>2</b>	<b>3</b>
1. Process night depository	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Process & accept bulk coinage for cash or deposit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Process business deposits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Support Services	1	2	3
4. Process incoming mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Process credit card payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Process cash advances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Place stop payment on check	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Investigate and resolve customer problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Assist to change customer name/account title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Assist to add co-owner or authorized signer to customer account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Assist to help a customer with account reconciliation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Rent safe deposit boxes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Wire transfer funds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Process federal tax payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Banking and Related Services Pathway

Banking Basic Additional Competencies - continued	Minimum rating of 2 for EACH Check Rating		
	1	2	3
<b>Support Services</b>			
15. Balance automated teller machine (ATM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Process a customer statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Process checks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Proof or encode items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Process electronic or internet payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Process return items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Assist with an internal audit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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### Additional Comments



## Banking and Related Services Pathway

Banking Advanced - Required Competencies	Minimum rating of 2 for EACH Check Rating		
	1	2	3
<b>Products &amp; Marketing</b>			
1. Obtain/complete documentation to close accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Obtain/Complete documentation to open accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Collaborate with marketing team efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Assist to evaluate marketing efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Close savings account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Assist to open new savings account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Lending Services	1	2	3
7. Identify prospective loan customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Process loan payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Respond to customer loan account inquiries and requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Maintain and update customer loan files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Banking Advanced - Additional Competencies	Minimum rating of 2 for EACH Check Rating		
	1	2	3
Choose at least 10 from list of 21 below			
<b>Products &amp; Marketing</b>			
1. Assist with promotional efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Close checking account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Assist to open new checking account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Assist to issue certificate of deposit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Assist to process decedent accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Issue US savings bonds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Redeem US savings bonds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Issue money orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Issue travelers checks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Issue foreign currency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Lending Services	1	2	3
11. Compile documentation for loan closing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Assist to complete a loan application with a customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Order credit reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Assist to collect and recover funds on default loans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Consumer Lending	1	2	3
15. Process documents for consumer loan application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Assist to pre-approve consumer loan customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Banking and Related Services Pathway

<b>Banking Advanced - Additional Competencies - continued</b>	Minimum rating of 2 for EACH Check Rating		
	<b>1</b>	<b>2</b>	<b>3</b>
<b>Mortgage Lending</b>			
17. Process documents for mortgage loan application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Assist to pre-approve mortgage loan customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Set mortgage loan closing date and time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Commercial Lending</b>	<b>1</b>	<b>2</b>	<b>3</b>
20. Process documents for commercial loan application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Assist to pre-approve commercial loan customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Insurance Pathway

Insurance Service Competencies	Minimum rating of 2 for EACH Check Rating		
	1	2	3
1. Maintain and update customer files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Process premium payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Marketing	1	2	3
3. Identify prospective customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Assist to evaluate marketing efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Collaborate with marketing team efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Policy Management	1	2	3
6. Gather and update information on application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Process customer application for insurance coverage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Respond to customer inquiries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Assemble insurance contract for mailing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Respond to customer change requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Manage policy changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Claims	1	2	3
12. Set up claim file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Review claim file for completeness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Update information regarding claims	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Process simple claim	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Assist to evaluate and settle claim	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Investigations	1	2	3
17. Order supporting documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Assist to complete investigation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Assist with investigation report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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### Additional Comments

## Additional Certifications, Training, Seminars and Projects

Please list in detail any additional certifications earned, any training and seminars attended, and/or any projects completed during the course of the Finance Youth Apprenticeship. **Circle your YA role**, and sign your name, then complete with the date.

Description		
Notes/Comments		
Date Completed	Mentor/Trainer/Instructor Signature	Date Signed

Description		
Notes/Comments		
Date Completed	Mentor/Trainer/Instructor Signature	Date Signed

Description		
Notes/Comments		
Date Completed	Mentor/Trainer/Instructor Signature	Date Signed

Other Notes or Comments		
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