

**SPECIALIST, HUMAN RESOURCES SUBSTITUTE
Summative Appraisal Form**

Name _____

School Location _____

Appraisal Period: From _____ to _____

Date of Review _____

Directions

The following statements describe the employee who achieves success. Based on cumulative performance information, the evaluator estimates the employee's effectiveness in meeting each criterion. Rate each criterion using the scale below that most closely describes the employee's attainment of that criterion. For each domain, a comment area is provided for general statements and/or recommendations.

Rating Scale

- 5 Clearly Outstanding:** Performance is consistently far superior to what is normally expected.
- 4 Exceeds Expectations:** Performance demonstrates increased proficiency and is consistently above expectations.
- 3 Meets Expectations:** Performance meets expectations and presents no significant problems.
- 2 Below Expectations:** Performance is consistently below expectations and significant problems exist.
- 1 Unsatisfactory:** Performance is consistently unacceptable.
- 0 Not Applicable**

MAJOR RESPONSIBILITIES AND DUTIES

Employment

- ___ 1. Handles routine HR inquiries to ensure a high level of service and responsive, knowledgeable support for employees and their supervisors. Explains HR policies and practices to employees as appropriate.
- ___ 2. Prepares, distributes, receives, and processes substitute applications. Screens all of the substitute applicants.
- ___ 3. Coordinates employment process (e.g. processing applications, inputting substitute data, analyzing transcripts, and references, preparing announcements of vacancies, retention of substitutes, permanent positions, for the purpose of meeting district staffing requirements while complying with established guidelines.
- ___ 4. Processes new hire paperwork including criminal history information, references, and other materials.
- ___ 5. Schedules, organizes and participates in substitute orientations.
- ___ 6. Monitors long-term substitute assignments for benefits eligibility and certification requirements, and notifies Chief Human Resources Officer and PEIMS Department for approval and access.
- ___ 7. Prepares listings and distributes the Letters of Reasonable Assurance for para-professionals, auxiliary and all substitute employees. Ensures collection of all substitute LORAs.
- ___ 8. Reviews and processes all application for student workers, summer school program and maintain all records for auditing purposes.
- ___ 9. Prepares, distributes, receives, and files substitute Memorandum for Records on substitute's personal file for active/inactive status.
- ___ 10. Prepares correspondence forms, manuals, substitute packets, slideshows, reports, following district standards and requirements.

- ___ 11. Maintains active and inactive substitute list and distributes to campus administration maintenance and food service departments.
- ___ 12. Maintains state and national criminal background checks utilizing the Texas Department of Public Safety (TXDPS), Clearinghouse following Senate Bill 9 fingerprinting requirements for district substitutes and volunteers.
- ___ 13. Assists Campus users with corrections, maintenance and changes needed on Aesop system to correspond with time cards and payroll documents.
- ___ 14. Conducts training on new state mandated Safety and Security Training to educate new substitute hires. Follows district safety protocols and emergency procedures.
- ___ 15. Processes, hires and maintains Private Non-Profit (PNP) Tutors.

COMMENTS: _____

Substitutes

- ___ 16. Creates Orientation yearly calendar, reserves training room, and notifies Chief Human Resources Officer for live viewing on website.
- ___ 17. Schedules and organizes monthly substitute orientations and evaluates, qualifies and invites applicants and advises of missing documents in a timely manner.
- ___ 18. Provides training sessions to district employees for Applitrack and AESOP usage on a one to one basis.
- ___ 19. Updates substitute handbook and all forms for substitute packets.
- ___ 20. Inputs information on AESOP for Substitutes and maintains current data, such as telephone numbers, education and certification and provides Substitute Listing to campus Principals.
- ___ 21. Maintain accurate records for substitute employees on our Skyward Database and AESOP.

COMMENTS: _____

Records, Reports, and Correspondence

- ___ 22. Inputs demographic information to process background checks on prospective employees, substitutes, volunteers and maintains records.
- ___ 23. Generates expiring food handler’s permit report monthly for all active full time employees. Works with Food Service Supervisor and Director to obtain these permits and update on Skyward Program.
- ___ 24. Manages and coordinates background applicants requesting observations hours for student teaching by sending correspondence and receiving approval from campus administration.
- ___ 25. Meets with all applicants or volunteers to resolve any background issues and discuss with Chief Human Resources Officer.
- ___ 26. Obtains and maintains all documents necessary for fingerprint; schedules appointments and reviews results on all employees and substitutes.

- ___ 27. Prepares correspondence, forms, manuals, schedules, spreadsheets, graphs, brochures and reports for the Chief Human Resources Officer and other department staff members using personal computer.
- ___ 28. Maintains physical and computerized departmental files.
- ___ 29. Assists with processing Professional, Para-Professional, and Auxiliary new hires.
- ___ 30. Assists in preparing, distributing, posting and closing job vacancy announcements and advertisements; and promoting at local job fairs.
- ___ 31. Purges all substitute files on a yearly basis and ensures proper storage for the Records Storage Department.

COMMENTS: _____

Other

- ___ 32. Assists public with information concerning position vacancies, completing the District application including typing test and scanning documents.
- ___ 33. Assists with providing Retirement/Resignation process and preparation and distribution of employee retirement and resignation confirmation letters.
- ___ 34. Coordinates the district retirement ceremony.
- ___ 35. Maintains confidentiality of information.
- ___ 36. Performs other duties assigned by supervisor.

COMMENTS: _____

What strengths does _____ possess?

What are some improvements _____ can make to ensure a higher degree of success?

Summative Conference Comments:

Recommendation of Evaluator: I have read and received a copy of this evaluation. I have reviewed this instrument.

- Renewal and/or Extension of Assignment
- Non-renewal of Assignment
- Termination of Assignment
- Non-extension of Assignment

Administrator's (Print Name)

Date

Administrator's (Signature)

Date

Employee's Signature

Date