

ACCOUNTANT ASSISTANT (SPECIAL EDUCATION)

Summative Appraisal Form

Name _____ 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 Demonstrated 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

JOB PERFORMANCE STATEMENTS

Grant & Special Education Financial Compliance

- 1. Prepares and submits required monthly, quarterly, and annual financial reports for all Special Education program revenue in compliance with local, state, and federal requirements.
2. Monitors all Special Education program budgets and expenditures to ensure alignment with local, state, and federal requirements.
3. Collaborates with the Comptroller and Special Education leadership to ensure compliance with local, state, and federal funding requirements.
4. Provides program directors opportunities to review financial reports prior to submission to TEA or other agencies.
5. Tracks and reports indirect costs, carryover funds, and budget amendments as required

COMMENTS: _____

Budgeting & Financial Coordination

- 6. Assists in the development, monitoring, and revision of budgets for special education program funds.

- _____ 7. Coordinates with purchasing and accounts payable departments to ensure timely processing of expenditures prior to local, state, and federal deadlines.
- _____ 8. Monitors budget reports and identifies significant variances; reports findings to appropriate supervisors.
- _____ 9. Submits bills and reimbursement documents to Medicaid on a regular basis for eligible special services provided by the district
- _____ 10. Assists with reconciling payments received from Medicaid on a regular basis for eligible special services provided by the district.
- _____ 11. Assists with compiling information to prepare and submit reports as needed and required, including those responsibilities related to SHARS, Medicaid, and Performance-Based monitoring for grants.

COMMENTS: _____

Recordkeeping & Documentation

- _____ 12. Maintains organized and accurate financial records, including requisitions, purchase orders, invoices, and supporting documentation for audits and compliance reviews.
- _____ 13. Maintains organized and accurate records and supporting documentation related to Medicaid and SHARS program revenue sources (transportation logs, parental consent forms, eligibility forms, etc.).
- _____ 14. Ensures documentation meets local, federal, state, and district audit standards for special education program funds.
- _____ 15. Prepares and maintains schedules of revenue, expenditures, and fund balances.

COMMENTS: _____

Audit & Compliance Support

- _____ 16. Assists internal, state, federal, and independent auditors with financial audits and compliance reviews related to special education funds.
- _____ 17. Assists in the development, implementation, and review of internal controls and standard operating procedures to ensure fiscal compliance.
- _____ 18. Provides monitoring reports to ensure Medicaid-eligible services are entered into the third-party billing administrator software program

COMMENTS: _____

Communication & Support

- ____ 19. Provides guidance and support to campus and department staff regarding budget procedures, coding, and compliance requirements.
- ____ 20. Provides support to the Special Education department regarding the third-party billing administrator software program for Medicaid documentation.
- ____ 21. Responds to inquiries from staff, administrators, and external agencies regarding financial matters.
- ____ 22. Maintains professional and effective working relationships with district personnel and outside agencies.

COMMENTS: _____

Other

- ____ 23. Answers incoming calls, provides information, and directs inquiries appropriately.
- ____ 24. Keeps informed of and complies with federal, state, and district policies, including TEA guidelines and grant requirements.
- ____ 25. Maintains confidentiality and security of all financial and student-related records.
- ____ 26. Performs other duties as 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 (Print Name)

Date

Administrator's Signature

Date

Employee's Signature

Date