

**CLERK, BUDGET ASSISTANT
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 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**

JOB PERFORMANCE STATEMENTS

- ___ 1. Prepare all incoming budget changes and amendments, review available balances in accounts and any additional research needed.
- ___ 2. Format and import entry of original budgets and accounting records into on-line Skyward System and maintain a systematic filing method.
- ___ 3. Assist with annual budget process and maintain supporting documents for audit purposes.
- ___ 4. Process ACH file for payroll, print check stubs and print weekly vendor checks for Accounts Payable.
- ___ 5. Invoice appropriate departments and campuses for utilities, postage, transportation, and fuel.
- ___ 6. Assist Budget Clerk with End of Month Duties, including but not limited to sending notifications to budget managers, finalizing amendment log, tracking CR's etc.
- ___ 7. Maintain posting of information on District "Financial Transparency" webpage.
- ___ 8. Develop specific goals and plans to prioritize, organize, and accomplish duties.
- ___ 9. Continuous development in Skyward and familiarization with Financial Accountability System Resource Guide (FASRG).

