

**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).

COMMENTS: _____

Other

____ 10. Maintain confidentiality of information.

____ 11. Compile, maintain, and file all physical and computerized reports, records, and other documents required.

____ 12. Perform all other task and duties as assigned.

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