

**Specialist, Human Resources
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**

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. Maintains position control system in an accurate and timely manner. Reconciles job descriptions and evaluations with position control to ensure that there is a job description and job evaluations for every job. Follows up with supervisors to make certain that job descriptions are reviewed and updated on a regular basis.
- ____ 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 application materials.
- ____ 5. Computes salaries on Professional, Para-Professionals and Hourly –wage employees.
- ____ 6. Guides applicants' as they apply for Para-Professional Certification with the Texas State Board of Education.
- ____ 7. Prepares listings for the Letters of Reasonable Assurance for auxiliary and all substitute employees, assist with distribution and maintenance of letters.

- ___ 8. Reviews and processes all application for summer school program and maintain all records.
- ___ 9. Prepares and manages budget accounts for the Human Resources Department.
- ___ 10. Obtains Bus Driver Backgrounds (Driving Records) yearly on every Bus Driver, Substitute Bus Driver and Prospective Bus Drivers.
- ___ 11. Maintains state and national criminal background checks utilizing the Texas Department of Public Safety (TXDPS), Clearinghouse following Senate Bill 9 fingerprinting requirements.

Comments: _____

Substitutes

- ___ 12. Schedules and organizes monthly substitute orientations and evaluates, qualifies and invites applicants and advises of missing documents in a timely manner.
- ___ 13. Provides training sessions to district employees for Applitrack and AESOP usage on a one to one basis.
- ___ 14. Updates substitute handbook and all forms for substitute packets.
- ___ 15. Inputs information on AESOP for Substitutes and maintains current data, such as telephone numbers, education and certification and provide Substitute Listing to campus Principals.
- ___ 16. Maintains accurate records for substitute employees on our Skyward Database and AESOP.

Comments: _____

Leave of Absence

- ___ 17. Processes all long-term absences according to established guidelines including determining eligibility for various leave programs (e.g., family medical leave and temporary disability leave) and provides employees with appropriate and timely notice.
- ___ 18. Counsels with employees and supervisors concerning leave benefits and provide employees with accurate information related to absences such as deductions from pay, medical certification requirements, return-to-work dates, and fitness-for-duty requirements.

- ___ 19. Works cooperatively with payroll department and risk management to process and coordinate all employee leaves and absences, including those relating to workers' compensation claims.
- ___ 20. Works with campus and departmental administrative staff to process daily absence reports.
- ___ 21. Maintains employee leave records, including confidential medical information in accordance with federal and state laws and regulations and district policies and procedures.

Comments: _____

Budget

- ___ 22. Works cooperatively with payroll and other HR staff to ensure accuracy of leave reports and substitute pay.
- ___ 23. Maintains records for the Grow Our Own Program and meet and evaluate every semester and prepare letters and pay bills as necessary.
- ___ 24. Schedules and submits all travel for conferences, trainings or any other travel needed by the HR staff.

Comments: _____

Records, Reports, and Correspondence

- ___ 25. Inputs demographic information to process background checks on prospective employees, substitutes, volunteers and maintain records.
- ___ 26. Prepares all Purchase Orders for HR Staff.
- ___ 27. Assures that all Labor Law Posters are updated and that we are in compliance.
- ___ 28. Meets with all applicants or volunteers to resolve any background issues and discuss with Chief Human Resources Officer.
- ___ 29. Obtains and maintains all documents necessary for fingerprint; schedules appointments and reviews results on all employees and substitutes.
- ___ 30. Prepares correspondence, forms, manuals, schedules, spreadsheets, graphs, brochures and reports for the Chief Human Resources Officer and other department staff members using personal computer.

- ___ 31. Maintains physical and computerized departmental files.
- ___ 32. Prepares professional new hire call and sign-in listing. Contactst new hires after they have been board approved. Schedule new hires to in-process and inform Employee Benefits and Support Services Department.
- ___ 33. Assists with processing Professional, Para-Professional, and Auxiliary new hires.
- ___ 34. Assists in preparing and distributing or posting job vacancy announcements and advertisements.
- ___ 35. Tracks absence data and provides campus principals, other department heads, and others with trend reports as needed.

Comments: _____

Other

- ___ 36. Manages records storage and destruction process for the HR records following established records retention schedule and requirements for the Texas State Library and Archives.
- ___ 37. Assists public with information concerning position vacancies, completing the District application including typing test and scanning documents.
- ___ 38. Manages and maintains account for any grants available to the district for personnel.
- ___ 39. Inputs demographic information to process background checks on prospective employees, substitutes, volunteers and maintains records.
- ___ 40. Prepares and distributes position select and non-select letters for summer school programs.
- ___ 41. Assists in the recruitment of all employees by promoting the District at local job fairs.
- ___ 42. Assists in maintaining recruiting materials and displays for all job fairs.
- ___ 43. Assists with providing Retirement/Resignation Part I and Part II forms.
- ___ 44. Assists with preparation, mail and email employee retirement and resignation confirmation letters.
- ___ 45. Assists with processing, receiving, and maintaining records for letters of assurance of employment for stipends, auxiliary, and all substitute employees.
- ___ 46. Assists with the preparing and distributing position vacancies on Applitrack.
- ___ 47. Assists with Retirees reception etc.
- ___ 48. Performs other duties assigned by supervisor.
- ___ 49. Maintains confidentiality of information.
- ___ 50. Maintains an accurate and up-to-date listing of all volunteers and distribute list to campuses

