

**CLERK, BUDGET
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 into on-line Skyward Budget System and maintain a systematic filing method.
- ___ 3. Assist with annual budget process.
- ___ 4. Process ACH file for payroll and print check stubs.
- ___ 5. Process and print weekly vendor checks for Accounts Payable.
- ___ 6. Process Local Maintenance checks from Accounts Payable and deposit to proper accounts. Prepare bank deposit form and data sheet with appropriate backup. (Serve as backup for Budget Clerk)
- ___ 7. Take outgoing wire transaction forms and payroll diskettes to bank as needed for Finance Department.
- ___ 8. Invoice appropriate departments and campuses for utilities, postage, transportation, and fuel.
- ___ 9. Prepare data sheet for Federal Program reimbursement for prior month expenditures.
- ___ 10. Develop specific goals and plans to prioritize, organize, and accomplish your duties.

___ 11. Continuous development in Skyward and familiarization with Financial Accountability System Resource Guide (FASRG).

COMMENTS: _____

Other

___ 12. Maintain confidentiality of information.

___ 13. Compile, maintain, and file all physical and computerized reports, records, and other documents required.

___ 14. 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