

Haysville USD #261
Employee Performance Review
Accounting Assistant - Secretary

EMPLOYEE INFORMATION

Employee Name

Location

Job Classification

Evaluator Name

REVIEW GUIDELINES

Directions:

As with any evaluation process, the intent is to provide information that will enable the employee to improve job performance. Individuals needing to improve in an area shall be given specific information as to the reasons why improvement is needed and time to correct any deficiencies.

Check one rating for each function. The evaluator may comment on any marking but functions marked "Marginal" or "Unsatisfactory" shall include suggestions for improving performance.

Complete this Employee Evaluation using the following scale:

Outstanding – Performance is so successful at this element of your job that special note should be made.

Very Good – Performance at this level is consistently better than average.

Satisfactory – Performance is at or above the standards required.

Marginal – Performance is somewhat below the minimum standard for this element of your job. There appears to be, however, potential and the willingness to improve.

Unsatisfactory – Performance on this element of your job is well below the standards and potential and/or willingness to meet the minimum standards is not immediately apparent.

REVIEW OF ESSENTIAL JOB FUNCTIONS

1. Reconcile bank statement weekly with all debits, credits, and posted receipts to account for the districts expenditures.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

2. Post receipts on districts FA2 system for the purpose of accountability within the school district.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

3. Manage insufficient check collection to account for all that have insufficient payments to the district.

Outstanding Very Good Satisfactory Marginal Unsatisfactory

Comments:

4. Provide vendors the appropriate paperwork to complete routine and Capital Outlay projects within the district.

Outstanding Very Good Satisfactory Marginal Unsatisfactory

Comments:

5. Prepare monthly Board of Education inserts to keep the Board of Education members informed.

Outstanding Very Good Satisfactory Marginal Unsatisfactory

Comments:

6. Post and manage account numbers in the districts FA2 system to ensure accurate bookkeeping.

Outstanding Very Good Satisfactory Marginal Unsatisfactory

Comments:

7. Manage and run monthly budget reports in order to provide timely budget information to department heads and principals.

Outstanding Very Good Satisfactory Marginal Unsatisfactory

Comments:

8. Balance receipt books to ensure accountability of district funds.

Outstanding Very Good Satisfactory Marginal Unsatisfactory

Comments:

9. Prepare chart of accounts books to ensure that all the proper accounts are being credited when compiling Ereqs.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

10. Assist with annual budget preparation to allow for budget projections.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

11. Manage Petty Cash account by auditing all school petty cash accounts to maintain accountability of each individual school.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

12. Prepare quarterly Medicaid report in order to receive state reimbursement.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

13. Prepare paperwork for bond payments to ensure the proper company is paid.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

14. Manage all software cleanups in order to ensure efficient operations.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

15. Manage Bond and Notary Insurance to ensure access to notaries within the schools.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

16. Maintain a high level of confidentiality regarding student and staff information in order to remain in compliance with legal requirements and to maintain a professional work environment.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

17. Perform other duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

Outstanding

Very Good

Satisfactory

Marginal

Unsatisfactory

Comments:

COMMENTS AND SIGNATURES

Evaluator Comments:

Employee Comments: _____

I have discussed this performance evaluation with the employee.

Evaluator's Signature

Date

I have reviewed this performance evaluation.

Administrator's Signature

Date

I have read this evaluation of my performance and discussed it with my evaluator.

Employee's Signature

Date