

**DR06 CLERK, ACCOUNTING  
Summative Appraisal Form**

Name \_\_\_\_\_ School Location \_\_\_\_\_

Position \_\_\_\_\_ Date of Review \_\_\_\_\_

Evaluator \_\_\_\_\_

Appraisal Period: From \_\_\_\_\_ to \_\_\_\_\_

**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**

**General Duties**

- \_\_\_\_ 1. Assumes responsibility for the verification of vendor name, address and amounts to the attached invoice(s) before distribution of checks either clearing or in-house working in conjunction with the Data Entry clerk, Finance.
- \_\_\_\_ 2. Assumes responsibility for maintaining the clearing check log to obtain signatures on those checks released to individuals.
- \_\_\_\_ 3. Assumes responsibility for the distribution of accounts payable checks.
- \_\_\_\_ 4. Assumes responsibility for maintaining the in-house check log per bank account.
- \_\_\_\_ 5. Assumes responsibility for the distribution of in-house checks.

- \_\_\_\_6. Assumes responsibility for submitting the in-house check documentation to the Data Entry Clerk, Finance, for data entry.
- \_\_\_\_7. Provides copy of purchase order including support documentation pertaining to fixed assets to the Fixed Assets Manager.
- \_\_\_\_8. Assumes responsibility for assigning reference number to the tax revenue bank deposits.
- \_\_\_\_9. Assumes responsibility for assigning reference numbers for all bank account deposits.
- \_\_\_\_10. Assumes responsibility for matching bank deposit slip with the bank deposit data sheet and resolving any discrepancies prior to submitting for data entry.
- \_\_\_\_11. Assumes responsibility for entering and/or updating the amount deposited onto the deposit reference number log.
- \_\_\_\_12. Serves as backup for the Filing Clerk in his/her absence.
- \_\_\_\_13. Assumes responsibility for the determination and invoicing of accounts receivable (including unemployment compensation, warehouse, workman’s compensation, and utilities).
- \_\_\_\_14. Assumes responsibility for the determination and invoicing for use of school vehicles (buses, suburban).
- \_\_\_\_15. Prepares invoices to charge Food Service for utilities, and postage and Xerox charges.
- \_\_\_\_16. Writes receipt and prepares deposit for funds received from faxes and copies.

**COMMENTS:** \_\_\_\_\_  
 \_\_\_\_\_

**Other**

- \_\_\_\_17. Performs other duties assigned by supervisor.
- \_\_\_\_18. Maintains confidentiality of information.

**COMMENTS:** \_\_\_\_\_  
 \_\_\_\_\_

What strengths does \_\_\_\_\_ possess?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

