

**DR58 SECRETARY, INSURANCE/ACCOUNTING
Summative Appraisal Form**

Name _____ School Location _____

Position _____ Date of Review _____

Evaluation _____

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

- ____1. Processes initial paperwork on all insurance related issues for all employees.
- ____2. Processes all employee benefits enrollment and change forms within the time limit required by law and/or District.
- ____3. Calculates, maintains, updates, and posts employee payroll deductions associated with employee benefit programs, such as, group health insurance, dental, vision, etc. in time to meet payroll deadlines.
- ____4. Processes initial response to unemployment claims as directed by supervisor.
- ____5. Assists in the preparation of materials for unemployment telephonic hearings.
- ____6. Maintains contact with campuses and district departments to ensure that employee injuries are reported in a timely manner and within the guides of the law.

- ____7. Coordinates the proper and efficient flow of information to employees regarding their rights and responsibilities under the Workers' Compensation Act.
- ____8. Communicates with the necessary entities and personnel to ensure appropriate processing of Workers' Compensation claims.
- ____9. Assists with preparation and distribution of employee benefits handbook, and updates employee benefits brochure as directed.
- ____10. Communicates to supervisor employee inquiries and complaints to ensure quick and accurate resolution.
- ____11. Provides active and terminated employees with timely information related to health insurance as required by Consolidated Omnibus Budget Reconciliation Act (COBRA) and Health Insurance Portability and Accountability Act (HIPAA).
- ____12. Assists with the coordination of annual insurance open enrollment process, including the preparation, distribution, receiving and processing of related materials.
- ____13. Processes all long-term leave requests and submits to supervisor pertinent information to determine eligibility for Family and Medical Leave (FMLA) and temporary disability leave.
- ____14. Communicates and directs the flow of information related to requests for Leaves of Absence to employees, campuses and departments.
- ____15. Maintains statistical data relative to premiums and cost and assists with the preparation of reports.
- ____16. Prepares reports related to employees' benefits as requested by CFO.
- ____17. Works with designated payroll clerk to balance monthly deduction statements.
- ____18. Assists in facilitating nurses' meetings, correspondence, travel requests, etc.
- ____19. Prepares purchase orders upon request.
- ____20. Prepares mail system reports as directed by supervisor.
- ____21. Compiles, files, and maintains all physical and computerized files related to major responsibilities and duties.
- ____22. Attends Health Insurance Committee meetings and maintains meeting minutes.

COMMENTS: _____

Other

- ____23. Performs other duties as assigned by supervisor.
- ____24. Maintains confidentiality of information as required by District and HIPAA laws.

COMMENTS: _____

What strengths does _____ possess?

What are some improvements _____ can make to ensure a higher degree of success for students on this campus/department?

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's Signature

Date

Employee's Signature

Date