

**DR07 CLERK, ACCOUNTS PAYABLE
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

Accounting

- ____ 1. Receives and processes for payment all accounts payable invoices, requisitions, purchase orders, etc.
- ____ 2. Matches invoices with proper purchase orders; ensures completeness and accuracy of invoices and shipments.
- ____ 3. Detects and resolves problems with incorrect orders, invoices, and shipments.
- ____ 4. Contacts district personnel and vendors to correct or obtain information needed.
- ____ 5. Confirms balances in accounts for all requisitions.
- ____ 6. Prepares and distributes paid invoices at designated times.

____7. Conducts periodic checks of travel reports and food service orders.

COMMENTS: _____

Data Entry

____8. Inputs accounting data using personal computer.

COMMENTS: _____

Records and Reports

____9. Files office copies of checks, requisitions, invoices, and purchase orders.

____10. Keeps records up to date.

____11. Maintains vendor files and sets up new accounts when changes occur.

COMMENTS: _____

Other

____12. Communicates current status of invoices to campus staff.

____13. Prepares correspondence using personal computer or typewriter.

____14. Receives incoming calls, answers questions, and directs calls to the proper party.

____15. Keeps informed of and complies with state and district policies and regulations concerning primary job functions.

____16. Performs other duties as assigned by supervisor.

____17. Maintains confidentiality of information.

COMMENTS: _____

What strengths does _____ possess?
