

**DR05 BOOKKEEPER, GENERAL FUND/SPECIAL REVENUE
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. Maintains complete and systematic records of district's financial transactions.
- ____2. Records details of financial transactions in appropriate journals and subsidiary ledgers.
- ____3. Maintains subsidiary accounts by verifying, allocating, and posting transactions.
- ____4. Maintains general ledger by transferring subsidiary account summaries.
- ____5. Examines all computerized general ledger transactions daily for accuracy; make corrections as needed and informs business manager of problems.
- ____6. Computes and records cash receipt summaries.

- ____7. Balances general ledger and subsidiary accounts by reconciling entries.
- ____8. Works with bank officials to make inquiries and resolve discrepancies in account records.
- ____9. Transfers funds between accounts as directed by business manager.

COMMENTS: _____

Records

- ____10. Prepares financial statements, income statements, and cost reports to reflect financial condition of district.
- ____11. Assists business manager with preparation of financial statements and budget amendments for presentation to board.
- ____12. Maintains physical and computerized files and records.

COMMENTS: _____

Other

- ____13. Performs other duties as assigned by supervisor.
- ____14. Maintains confidentiality of information.

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