

**DR10 CLERK, BUDGET  
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. Inputs data entry of all budget change requests into on-line finance system and maintains monthly records.
- \_\_\_\_2. Inputs data entry of all amendments into on-line finance system and maintains monthly records.
- \_\_\_\_3. Inputs data entry of original budgets into on-line budget system and maintains original budgets in a systemic filing method.
- \_\_\_\_4. Assists with transfer of information from on-line budget system to on-line finance and vice-versa at the appropriate time of year.
- \_\_\_\_5. Runs daily financial reports from on-line finance system in order to balance the day's data entry figures.

- \_\_\_\_6. Makes copies of budgets, amendments, budget change requests, etc. as needed for the budgeting department.
- \_\_\_\_7. Makes copies of and binds monthly district Amendment detail budget booklets.
- \_\_\_\_8. Checks on-line finance system for available balances in accounts as needed for amendments, research, etc.
- \_\_\_\_9. Copies and binds original approved budget books to send to board members and administrators.
- \_\_\_\_10. Assists with payroll checks when necessary (includes folding inserts, stuffing envelopes, handling automatic check folder, etc.)
- \_\_\_\_11. Takes checks and bank transfer letters to the bank for Accounting, Payroll and Finance.
- \_\_\_\_12. Accounts Receivable duties: Invoices Special Program Funds for utilities, copy machines, postage, etc. when applicable.
- \_\_\_\_13. Accounts Receivable duties: Invoices all programs for use of school vehicles for out of town trips when applicable.
- \_\_\_\_14. Deposits checks to the proper accounts when applicable as funds are collected.

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

\_\_\_\_\_

**Other**

- \_\_\_\_15. Performs other duties assigned by supervisor.
- \_\_\_\_16. 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:

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**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