

**DA22 CHIEF ACCOUNTANT
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

School Climate

- ___1. Oversees and maintains complete and systematic records of district's financial transactions..
- ___2. Records details of financial transactions in appropriate journals, subsidiary ledgers, and general ledger; inform Comptroller of any and all inaccuracies, and make correction as directed by the Comptroller.
- ___3. Reconciles subsidiary ledgers to general ledger and makes journal vouchers and/or corrections as directed by comptroller.
- ___4. Monitors the implementation for the payment of all bills and invoices sent to the accounting department after approval from appropriate administrative personnel.
- ___5. Checks TEA Payment Ledger for cash received; consults with the Comptroller and CFO for direction in recording Revenue, Obligation, or Due From State.
- ___6. Computes and records cash receipt summaries as directed by the Comptroller.

- ___7. Coordinates with Bank Depository Data Processing personnel to make inquiries and resolve discrepancies in account records.
- ___8. Prepares financial statements, income statements, and cost reports to reflect financial condition of district.
- ___9. Ensures the effective implementation for reconciliation of all bank accounts maintained by the district, including all investment accounts.
- ___10. Oversees the effective implementation for the reconciliation of the inventory system for Local Maintenance and Food Service.
- ___11. Assists Comptroller with preparation of financial statements that are presented to the Board
- ___12. Assists with the internal auditing of all school accounts.
- ___13. Monitors all billings from the accounting department to insure that all accounts are current.
- ___14. Performs other duties related to the accounting and financial condition of the district, as requested by Comptroller and/or CFO.
- ___15. Fosters good community relations and good relations among all school employees.

COMMENTS:

Other

- ___16. Performs other duties assigned by supervisor.
- ___17. Maintains confidentiality of information.

COMMENTS:

Supervisory Responsibilities

- ___18. Supervises the accounting staff and operations thereof as directed by the Comptroller.
- ___19. Provides training personally to staff in their day-to-day work activities as directed by the Comptroller.
- ___20. Leads staff in "catching" the vision of the district and employing an accounting mission that coincides with the district vision and mission under the direction of the Comptroller.
- ___21. Recommends other training as needed for accounting staff to Comptroller

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