

**DR16 CLERK, PAYROLL
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

Payroll Accounting

- ____1. Prepares all payrolls including semimonthly, monthly, and special payrolls.
- ____2. Prepares payroll checks for all employees and distributes to campuses and departments.
- ____3. Balances payroll earnings and deductions; makes related transfers of funds and deposits.
- ____4. Receives and audits time sheets for all district employees.

COMMENTS: _____

Data Entry

- ____5. Prepares and submits payroll reports and forms including those required by Internal Revenue Service, Texas Workforce Commission, Texas Retirement System, Federal Insurance Contributors' Act (FICA), Medicare, and Workers' Compensation Commission.
- ____6. Prepares and posts all payroll changes including payroll deductions, salary changes, termination, and new employee information.

COMMENTS: _____

Records and Reports

- ____7. Maintains physical and computerized files including payroll records, absent-from-duty reports, and service records.

COMMENTS: _____

Other

- ____8. Communicates with human resource department, campus secretaries, and employees to ensure accuracy of information reported; resolves payroll problems and inquiries.
- ____9. Responds to requests from financial institutions regarding verification of employment.
- ____10. Performs other duties as assigned by supervisor.
- ____11. 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