

**DR18 CLERK, PURCHASING 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**

**General Duties**

- \_\_\_\_ 1. Checks and verifies **all** invoices with:
- a) Purchase order number
  - b) Bid/Quote number
  - c) Bid/Quote discount
  - d) IPW (IF-paid-within) discount
  - e) Bid/Quote FOB Destination guarantee
  - f) Tax exemption

- g) Bid/Quote Pricing
  - h) Price increases
  - i) Price decreases
- \_\_\_\_2. Matches all invoices with accurate purchase order number.
  - \_\_\_\_3. Coordinates with Purchasing Agent to confirm bid/quote number on all invoices, if applicable.
  - \_\_\_\_4. Coordinates with Purchasing Agent to ensure all invoices are paid, all allowable discounts taken within the time line stated on bids, quotes, proposals and invoices.
  - \_\_\_\_5. Coordinates with Purchasing Agent to ensure no shipping/handling/freight charges are paid on FOB Destination orders.
  - \_\_\_\_6. Confirms no tax is charged on invoices.
  - \_\_\_\_7. Coordinates with Purchasing Agent to correlate all invoice charges with bid/quote proposal costs.
  - \_\_\_\_8. Verifies if price increases or decreases have been approved by the Purchasing Agent.
  - \_\_\_\_9. Obtains the Receiving Copy (Goldenrod) of each purchase order when order is complete, coordinating this responsibility with the District Warehouse Secretary to ensure this step is done in a timely fashion.
  - \_\_\_\_10. Ensures that no payments are delayed for lack of Receiving Copy (Goldenrod); pursues and follows-up vigorously the task of obtaining this documentation and appries the Purchasing Agent of all difficulties or roadblocks which might arise; requests end user send fax copy of goldenrod, followed up by original copy in order to take advantage of invoice discount/IPW.
  - \_\_\_\_11. Maintains a list of faxed goldenrod copies to ensure original is sent in a timely fashion.
  - \_\_\_\_12. Makes periodic follow-up on open-purchase orders.
  - \_\_\_\_13. Maintains a filing system for **all** purchase orders.
  - \_\_\_\_14. Participates in bid, formal quotation, and proposal openings.
  - \_\_\_\_15. Familiarizes oneself with company categories, bid numbers, and discounts offered.
  - \_\_\_\_16. Records, documents and maintains all written and oral communication with vendors pertaining to merchandise received, returned, delayed and/or cancelled.
  - \_\_\_\_17. Records, documents and maintains all written and oral communication with vendors pertaining to invoicing.
  - \_\_\_\_18. Assists in processing request for merchandise returned to vendors.
  - \_\_\_\_19. Cross-trains with other purchasing secretaries in order to be proficient in their duties and able to perform duties when necessary.

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

**Other**

\_\_\_\_20. Performs other duties assigned by supervisor.

\_\_\_\_21. 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