

SECRETARY, EMPLOYEE BENEFITS AND SUPPORT SERVICES
Summative Appraisal Form

Name _____

Location _____

Appraisal Period: From _____ to _____

Date of Review _____

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

- ____1. Process all employee benefits enrollment and change forms within the time limit required by law and/or District including the dissemination of Consolidated Omnibus Budget Reconciliation Act (COBRA) and Health Insurance Portability and Accountability Act (HIPAA) information.
- ____2. Assist with the coordination of annual insurance open enrollment process, including the preparation, distribution, receiving and processing of related materials.
- ____3. Calculate, maintain, update, and post employee payroll deductions and deposits associated with employee benefit programs, such as, group health insurance, dental, vision, etc. on time to meet payroll deadlines.
- ____4. Communicate to supervisor employee inquiries and complaints to ensure quick and accurate resolution.
- ____5. Maintain confidentiality of information as required by District and HIPAA laws.
- ____6. Balance monthly deduction statements and processes all payroll deduction checks to First Financial Administrators and bi-weekly liabilities.
- ____7. Process initial response to unemployment claims as directed by supervisor and prepare materials for telephone hearings.

- ____8. Maintain contact with campuses/departments to ensure that Workers' Comp injuries are reported in a timely manner and within the guidelines of the law and communicate with the necessary entities and personnel to ensure appropriate processing of Worker' Compensation claims.
- ____9. Coordinate the proper and efficient flow of information to employees regarding their rights and responsibilities under the Workers' Compensation claims.
- ____10. Prepare weekly mail system reports as directed.
- ____11. Prepare purchase orders, tracks goods or services ordered, check requests, conference registrations and travel forms as directed.
- ____12. Maintain budget files for all department accounts.

COMMENTS: _____

Other

- ____13. Perform all other tasks and duties as assigned.
- ____14. Assist with United Way Fund distributions and collections.
- ____15. Assist with Federal Impact Aid- meeting, form distribution/collection and report
- ____16. Assumes responsibility for matching bank deposit slip with the bank deposit data sheet and resolving any discrepancies prior to submitting for data entry.
- ____17. Attend Health Insurance Committee meetings and maintain minutes.

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 (Print Name)

Date

Administrator's Signature

Date

Employee's Signature

Date