

**SUPERVISOR, PAYROLL  
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. Directs the activities and assurance of accurate processing of employee paychecks by applying policy, procedures and tax laws. Effectively lead internal audit reports.
- \_\_\_ 2. Supervises and coordinates fiscal and calendar year-end processing of payroll, including supplemental payrolls, W-2 and other tax forms, and other government required documentation.
- \_\_\_ 3. Oversees the maintenance of payroll records, logs and files in accordance with district board policy and state and federal laws and regulations.
- \_\_\_ 4. Prepares quarterly tax returns for federal and FICA/Medicare, as well as monthly TRS reporting.
- \_\_\_ 5. Ensures timely reporting and payment of the employer's and employee's withholding taxes and miscellaneous withholdings to appropriate agencies, including court ordered deductions.
- \_\_\_ 6. Attends training sessions/conferences to enhance professional skills and knowledge.
- \_\_\_ 7. Demonstrates continuous effort to improve operations, decrease turnaround times, streamline work processes, and work cooperatively and jointly to provide quality seamless customer service.
- \_\_\_ 8. Evaluates job performance of employees to ensure effectiveness regarding their professional growth; work jointly with them to develop and accomplish improvement goals.

- \_\_\_ 9. Maintains current understanding of payroll software and provides training to District and Payroll Staff.
- \_\_\_ 10. Prepares and administers department budget. Monitor and authorize expenditures in accordance with established guidelines.

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

**Other**

- \_\_\_ 11. Maintains confidentiality of information.
- \_\_\_ 12. Performs all other task and duties as assigned.

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

What strengths does \_\_\_\_\_ possess?

\_\_\_\_\_  
 \_\_\_\_\_

What are some improvements \_\_\_\_\_ can make to ensure a higher degree of success? \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

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 (Print Name) Date

\_\_\_\_\_  
 Administrator's (Signature) Date

\_\_\_\_\_  
 Employee's Signature Date