

**CLERK, BUDGET  
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. Review budget changes/amendments submitted to analyze for completeness, accuracy, and conformance with procedures and regulations. Consult with budget managers to ensure that budget adjustments are made in accordance with CIP or department objectives.
- \_\_\_ 2. Assist in the compilation and preparation of annual budget process to include, but not limited to preparation of Budget Package, onsite budget preparation, and reviewing Budget Packages to ensure completeness.
- \_\_\_ 3. Prepare and analyze monthly board reports to be reviewed by Budget Coordinator and maintain detail function changes spreadsheet.
- \_\_\_ 4. Assume responsibility for assigning reference numbers for all bank account deposits. Input cash receipts and journal vouchers.
- \_\_\_ 5. Assume responsibility for matching bank deposit slip with the bank deposit data sheet and resolving any discrepancies prior to submitting for data entry. Assume responsibility for entering and/or updating the amount deposited onto the deposit reference number log.
- \_\_\_ 6. Process ACH File for payroll and print check stubs. Process and print weekly vendor checks for Accounts Payable. (Serve as backup for Clerk Budget Assistant)
- \_\_\_ 7. Invoice appropriate departments and campuses for utilities, postage, transportation, and fuel.

\_\_\_ 8. Continuous development in Skyward and familiarization with Financial Accountability System Resource Guide (FASRG).

\_\_\_ 9. Develop specific goals and plans to prioritize, organize, and accomplish your duties.

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

\_\_\_\_\_

**Other**

\_\_\_ 10. Maintain confidentiality of information.

\_\_\_ 11. Compile, maintain, and file all physical and computerized reports, records, and other documents required.

\_\_\_ 12. Perform 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:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

