

# Bamberg School District Two

## Payroll/Benefits Clerk Performance Evaluation

Employee Name: \_\_\_\_\_

Date: \_\_\_\_\_

Supervisor's Name: \_\_\_\_\_

### Review Guidelines

#### Directions:

As with any evaluation process, the intent is to provide information that will enable the employee to improve job performance. Individuals need to improve in an area shall be given specific information as to the reasons why improvement is needed and time to correct any deficiencies.

Check one rating for each function. The evaluator may comment on any marking but functions marked "Marginal" or "Unsatisfactory" shall include suggestions for improving performance.

#### Complete this Employee Evaluation using the following scale:

**Outstanding** – Performance is so successful at this element of your job that special note should be made.

**Very Good** – Performance at this level is consistently better than average.

**Satisfactory** – Performance is at or above the standards required.

**Marginal** – Performance is somewhat below the minimum standard for this element of your job. There appears to be, however, potential and the willingness to improve.

**Unsatisfactory** – Performance on this element of your job is well below the standards and potential and/or willingness to meet the minimum standards is not immediately apparent.

### Review of Essential Job Functions

1. Inputs salary and hourly wages into Smart Fusion system for the purpose of insuring accuracy of each employee's base salary.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

2. Gathers and computes hourly time sheets for the purpose of ensuring accuracy and adherence to procedures prior to processing.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

3. Reviews posted leave to ensure that each employee is compensated accurately based on leave balances if leave has been depleted.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

4. Post and process all payroll withholdings for the purpose of accountability of items withheld from each employee's check.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

5. Enter monthly payroll for the purpose of ensuring that employees are paid accurately and timely, and that all account procedures are maintained.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

6. Print and distribute checks for the purpose of authorizing timely payment.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

7. Prepare voucher checks for payroll deductions to ensure accurate accounting.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

8. Run monthly reports for the purpose of ensuring records are current and to provide an up-to-date reference and audit trail for compliance.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

9. Report state, federal, unemployment withholdings for the purpose of providing necessary information to local, state and federal agencies.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

10. Process salary protection claims for the purpose of ensuring accuracy and adherence to procedures prior processing.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

11. Complete quarterly, yearly tax reports to ensure records are current and provide an up-to-date reference and audit trail for compliance.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

12. Print and distribute W2 information for the purpose of ensuring that all employees receive the proper information to complete any State and Federal forms.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

13. Print and distribute Terms of Employment forms for every employee annually in October to ensure employees are informed of their salaries and contracted days.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

14. Maintains a high level of confidentiality regarding student and staff information in order to remain in compliance with legal requirements and to maintain a professional work environment.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

15. Keeps the Director of Business Operations informed of issues as they arise to ensure proper disposition of issues.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

16. Performs other duties assigned for the purpose of ensuring the efficient and effective functioning of the department.

Outstanding       Very Good       Satisfactory       Marginal       Unsatisfactory

Comments:

Employees Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Supervisors Signature: \_\_\_\_\_

Date: \_\_\_\_\_

I have reviewed this performance evaluation and my signature does not necessarily indicate agreement.