

**WAKULLA COUNTY SCHOOL BOARD
 COMPREHENSIVE ASSESSMENT FORM SUMMARY
 SUPPORT PERSONNEL**

Name _____ Position **FISCAL SPECIALIST – PAYROLL**

School / Dept _____ School Year _____ EIN # _____

JOB CONTEXT SERVICE CATEGORY	Needs				
	<u>Outstanding</u>	<u>Exemplary</u>	<u>Effective</u>	<u>Improvement</u>	<u>Unsatisfactory</u>
1. SERVICE DELIVERY	<input type="checkbox"/> 30	<input type="checkbox"/> 28	<input type="checkbox"/> 26	<input type="checkbox"/> 18	<input type="checkbox"/> 0
2. INTER/INTRA – AGENCY COMMUNICATION AND DELIVERY	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 12	<input type="checkbox"/> 6	<input type="checkbox"/> 0
3. EMPLOYEE QUALITIES/RESPONSIBILITIES	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
4. SYSTEM SUPPORT	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
5. WORKSITE SERVICE STANDARDS	<input type="checkbox"/> 18	<input type="checkbox"/> 16	<input type="checkbox"/> 14	<input type="checkbox"/> 7	<input type="checkbox"/> 0
Totals:	<input style="width: 50px; height: 20px;" type="text"/>	<input style="width: 50px; height: 20px;" type="text"/>	<input style="width: 50px; height: 20px;" type="text"/>	<input style="width: 50px; height: 20px;" type="text"/>	<input style="width: 50px; height: 20px;" type="text"/>

Overall Rating

Information from the comprehensive feedback summary was collected and analyzed in the preparation of this report.

Outstanding _____ Exemplary _____ Effective _____ Needs Improvement _____ Unsatisfactory _____
 100 – 94 93 – 86 85 – 75 74 – 65 64 - 0

Comments of the Evaluatee:

This evaluation has been discussed with me: Yes _____ No _____

 Signature of Evaluatee

 Date

Comments of the Evaluator:

 Signature of Evaluator

 Date

**WAKULLA COUNTY SCHOOL BOARD ANNUAL
PERFORMANCE APPRAISAL
FISCAL SPECIALIST – PAYROLL**

Name _____ Position _____

School / Dept. _____ School Year _____

1. SERVICE DELIVERY

Category Definitions

1. Maintain payroll pending files.
2. Enter all data required by payroll software system to process payroll records.
3. Prepare, update and maintain the system for new employees and employees as needed for processing of payroll.
4. Prepare time card entries reported on payroll reports; i.e., sick, personal, annual leave, other earnings, part-time instructional, workshops, field trips, summer pay, activity pay, leave without pay, and others.
5. Executive payroll system to completion, printing of payroll checks and all required registers and reports and interface with finance system.
6. Prepare payroll checks for distribution.
7. Prepare requests for cash necessary for net pay.
8. Maintain required printouts in binder.
9. Process payroll insurance deduction checks / checks for employees on leave of absence and COBRA participants.
10. Process payroll taxes electronically.
11. Process monthly retirement contribution summary.
12. Maintain files on payroll reports and other related recordings, including payroll deductions.
13. Prepare Form 941 (quarterly) and W-2 forms (annually).
14. Verify employment of personnel.
15. Prepare special personnel reports upon request.

Source Code (Check Choices) A. Direct Documentation B. Indirect Documentation C. Training Programs Competency Acquisition D. Evaluatee Provided E. Confirmed Observation

Rating Code (Check One) Outstanding 30 Exemplary 28 Effective 26 Needs Improvement 18 Unsatisfactory 0

2. INTER / INTRA-AGENCY COMMUNICATION AND DELIVERY

Category Definitions

16. Provide for positive communication among staff.
17. Serve as a resource to schools and departments in areas of responsibility.
18. Serve as a liaison with other agencies as required.
19. Perform routine duties as required; i.e., serve as receptionist, compose and send correspondence, answer telephones, sort and distribute mail and order materials.

Source Code (Check Choices) A. Direct Documentation B. Indirect Documentation C. Training Programs Competency Acquisition D. Evaluatee Provided E. Confirmed Observation

Rating Code (Check One) Outstanding 16 Exemplary 14 Effective 12 Needs Improvement 6 Unsatisfactory 0

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FISCAL SPECIALIST – PAYROLL**

Name _____ Position _____

3. EMPLOYEE QUALITIES / RESPONSIBILITIES

Category Definitions

- 20. Maintain confidentiality regarding all matters related to assignments.
- 21. Participate in workshops and training sessions as required.
- 22. Maintain work area in a safe and secure manner.
- 23. Model and maintain high ethical standards.
- 24. Follow attendance and proper dress rules as required.

Source Code A. Direct B. Indirect C. Training Programs D. Evaluatee E. Confirmed
(Check Choices) Documentation Documentation Competency Acquisition Provided Observation

Rating Code Outstanding Exemplary Effective Needs Improvement Unsatisfactory
(Check One) 18 16 14 7 0

4. SYSTEM SUPPORT

Category Definitions

- 25. Ensure that School Board policies and governmental regulations are consistently applied to assignments.
- 26. Assist and/or direct the investigation of errors and complaints.
- 27. Assist in training other personnel providing back-up assistance as necessary.
- 28. Assist the Director with required reports.
- 29. Perform other incidental tasks consistent with the goals and objectives of the District and this position.

Source Code A. Direct B. Indirect C. Training Programs D. Evaluatee E. Confirmed
(Check Choices) Documentation Documentation Competency Acquisition Provided Observation

Rating Code Outstanding Exemplary Effective Needs Improvement Unsatisfactory
(Check One) 18 16 14 7 0

5. WORKSITE SERVICE STANDARDS

Category Definitions

Student growth and achievement, the work ethic, fostering and developing professional image, collaboration and affirmative networking, systemic and systematic preparation for function delivery, interpersonal interaction, teammanship and communication skills, translating organizational purpose into observable behavior and others.

(Special Note): An effective or higher rating is required in this job context category in order to be eligible for an overall effective or higher rating.

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(Check Choices) Documentation Documentation Competency Acquisition Provided Observation

Rating Code Outstanding Exemplary Effective Needs Improvement Unsatisfactory
(Check One) 18 16 14 7 0