

Please return to the Personnel Office by _____

Employee's Name: _____
Period of Evaluation: From _____ To _____

Department/Office: _____
Date of Evaluation: _____

Type of Evaluation

___ 1st ___ 2nd ___ 3rd
___ Final ___ Special (_____)

Status:

Probable Permanent
Provisional/Temporary

Permanent
Hourly

Probationary

A. Task Ratings

If a specific task is not applicable, check box at right of each task.

Task Rating
0 not applicable
1 unsatisfactory
2 marginal
3 satisfactory
4 very good
5 outstanding

Specific Task:

1. Answers Telephone _____

Standards:

- 1. Answers phone promptly/courteously _____
- 2. Screens and transfers phone calls promptly and properly _____
- 3. Transmits messages accurately and timely _____
- 4. Information given to person called is usually accurate in content _____

Supportive comments for ratings: _____

2. Handling and routing of incoming/outgoing mail, and other material _____

Standards:

- 1. Examines and sorts all mail with minimum amount of guidance/supervision _____
- 2. Answers routine mail inquiries _____
- 3. Directs mail to appropriate recipient on timely basis _____
- 4. Distributes mail promptly after supervisor's review _____
- 5. Generally distributes materials promptly _____

Supportive comments for ratings: _____

3. Types letters/correspondence/forms _____

Standards:

- 6. Typing is completed within the deadlines set by the department or supervisor _____
- 7. Margins and format of letter/draft are correct and acceptable _____
- 8. Finished product rarely contains error in spelling and punctuation _____
- 9. Prepared documents are neat in appearance _____

Supportive comments for ratings: _____

4. Maintains alphabetical/numerical files pertaining to the operations of office ____

Standards:

- 1. Places all information in correct alpha or numerical order _____
- 2. Filing is done with minimal amount of supervision _____
- 3. Pulls and re-files data quickly and correctly _____
- 4. Information is easily and promptly retrievable _____
- 5. Maintains files in neat, professional condition _____

Supportive comments for ratings: _____

5. Dictation – takes dictation and transcribes ____

Standards:

- 1. Takes dictation with facility and without need for excessive repetition _____
- 2. Transcribes notes with a minimum of easily correctable errors _____
- 3. Transcribes dictation within prescribed deadlines _____

Supportive comments for ratings: _____

6. Receptionist duties/maintains schedule of appointments and arranges for needed material ____

Standards:

- 1. Arranges appointments/meetings and keeps them spaced so that there are no conflicts _____
- 2. Needed materials are provided at the beginning of each meeting _____
- 3. Advises appropriate personnel of any changes in schedule and reschedules appointments _____

Supportive comments for ratings: _____

7. Deals with public, faculty, staff, and students ____

Standards:

- 1. Employs a tactful and courteous manner in handling the public, faculty, staff members, or students _____
- 2. Provides assistance to unscheduled visitors to preclude unnecessary interruptions in preplanned schedules _____
- 3. Directs those seeking assistance to appropriate services and offices correctly, efficiently, and courteously _____
- 4. Provides accurate responses to requests for information directly related to employee fund _____
- 5. Responds correctly with information after conferral with supervisor or proper resource _____
- 6. Uses discretion and propriety in responding to requests for information _____

Supportive comments for ratings: _____

8. Types charts, graphs, statistical reports, and other specialized typing (i.e., exams, scientific/mathematics and accounting nomenclature) ____

Standards:

- 1. Entries are correctly typed and in proper format _____
- 2. Makes corrections without need for excessive discussion _____
- 3. Prepares neat, finished product _____
- 4. Meets deadlines as set by the Department or Supervisor _____

Supportive comments for ratings: _____

9. Performs computation and/or handles money ____

Standards:

- 1. Performs computations quickly and accurately _____
- 2. Completes and records forms/information to proper agency/office in a timely fashion _____
- 3. Proves balances and check numbers as required _____
- 4. Places correct data on proper forms _____
- 5. Post data accurately to appropriate records/files _____
- 6. Distributes checks/information as required _____

Supportive comments for ratings: _____

10. Creates, maintains, evaluates, and verifies records/data ____

Standards:

- 1. Collects information and determines that it is complete _____
- 2. Verifies accuracy of data received _____
- 3. Reviews and applies knowledge about rules and regulations _____
- 4. Conforms documents with rules and regulations _____
- 5. Inputs data into computer terminal and/or posts to proper record _____
- 6. Verifies input/posting _____
- 7. Performs data manipulations and other required functions _____
- 8. Prepare appropriate summaries _____
- 9. Disseminates data to appropriate offices/agencies/individuals _____

Supportive comments for ratings: _____

Other task: (Please include here those tasks not mentioned on pages 1-4 which apply to your office or this employee. For each task, identify standards and use rating process as for other tasks above.)

B. Overall Rating

1. Comments on critical performance factors not included among specific task:

2. The employee's overall rating is:

___ 0 not applicable

___ 1 unsatisfactory

___ 2 marginal

___ 3 satisfactory

___ 4 very good

___ 5 outstanding

Supportive comments for ratings: _____

C. Plans and Recommendations

1. Plans to improve employee's performance:

2. Plans and recommendations to better utilize employee's strengths:

3. Plans to change conditions:

4 Other:

D. Record of Appraisal Interview

Supervisor's Signature

Date

I have reviewed this report on the date indicated and have had the opportunity to discuss it with my rating supervisor(s). I have also received a copy of this evaluation. My signature does not necessarily signify agreement with its contents, and I understand that I may submit a rebuttal.

Employee's Signature

Date

Overall Supervisor's Signature

Date