

**ABC Company**  
**QuickBooks Enterprise Solutions Bookkeeper**  
**Performance Evaluation**

Name \_\_\_\_\_ Review Period \_\_\_\_\_

Time in Position \_\_\_\_\_ Evaluator \_\_\_\_\_

**Employee Rating Definitions**

<b>Excellent</b>	Performance that far exceeds expectations for complete competency in the job. Rare. About 1-2 % of employees.
<b>Superior</b>	Performance that consistently exceeds expectations for complete competency in the job.
<b>Meets Standards</b>	Performance that consistently meets standards and, in rare cases, surpasses expectations for complete competency in the job.
<b>Room for Improvement</b>	Performance that sometimes meets expectations for competency in the job, but often falls short and needs improvement to meet the standards. On probation.
<b>Unsatisfactory</b>	Performance that falls substantially short of expectations for competency in the job. At risk for termination.

**Objectives Review**

<b>Major Objectives</b>	<b>Weight %</b>	<b>Results Achieved</b>	<b>Rating E S M R U</b>
<b>General Setup and Accounting Records:</b> <ul style="list-style-type: none"> <li>• Company file setup and maintenance and software installation</li> <li>• User setup and security</li> <li>• Backups</li> <li>• Vendor maintenance</li> <li>• Customer records</li> <li>• Forms design</li> <li>• Items maintenance</li> <li>• Employee maintenance</li> </ul>	15		
<b>Transactions:</b> <ul style="list-style-type: none"> <li>• Bill processing</li> <li>• Inventory receiving</li> <li>• Time tracking</li> </ul>	35		

<ul style="list-style-type: none"> <li>• Estimates</li> <li>• Customer invoicing</li> <li>• Banking transactions</li> <li>• Payroll</li> <li>• Miscellaneous journal entries</li> </ul>			
<b>Reporting and Reconciliation:</b> <ul style="list-style-type: none"> <li>• Cash balance</li> <li>• Reports</li> <li>• Reconciliations</li> <li>• Payroll tax requirements</li> <li>• Inventory reconciliation</li> <li>• Sales tax reports</li> <li>• Financial statements</li> <li>• Multi-company reports</li> </ul>	30		
<b>Interfaces and Miscellaneous:</b> <ul style="list-style-type: none"> <li>• Bank deposits</li> <li>• Interface with CPA</li> <li>• Data import/export</li> <li>• Customer service</li> <li>• International currencies</li> <li>• Planning and forecasting</li> <li>• Software updates</li> <li>• Miscellaneous duties</li> </ul>	20		

### Job Behaviors Review

Job Behaviors	E	S	M	R	U	Examples
How productive is this person? Quantity of work? Quality of work? Gets things done? Job knowledge? Computers? QuickBooks? Accounting? General office procedures? Business concepts?						
How well does this person initiate work? (Starts assignments without prompting? Independently contributes ideas and projects?)						
How well does this person make decisions? Judgment? Timely? Effective? Takes appropriate risks?						
How well does this person plan and organize work? Sets objectives and priorities? Manages personal						

resources efficiently to meet deadlines?						
How well does this person analyze problems? Identifies relevant issues? Evaluates crucial issues?						
How well does this person generate creative solutions? Sees new and better ways of doing things?						
How well does this person communicate? Orally? In writing? With co-workers? Boss? Customers? CPAs?						

**Overall rating and trend for the review period:**

**E S M R U**

**Improving   Sustained Level   Declining   New in Job**

**Strengths and improvements:**

Employee's greatest strengths:

Improvements the employee should focus on:

**Employee Comments:**

**Signatures and Approvals:**