

**ABC Company
QuickBooks Premier Bookkeeper
Performance Evaluation**

Name _____ Review Period _____

Time in Position _____ Evaluator _____

Employee Rating Definitions

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

Objectives Review

Major Objectives	Weight %	Results Achieved	Rating E S M R U
General Setup and Accounting Records: <ul style="list-style-type: none"> • Company file setup and maintenance and software installation • User setup and security • Backups • Vendor maintenance • Customer records • Forms design • Items maintenance • Employee maintenance 	10		
Transactions: <ul style="list-style-type: none"> • Bill processing • Inventory receiving • Time tracking 	40		

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