

**ABC Company  
QuickBooks Online 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<br/>E S M R U</b> |
|---|-----------------|-------------------------|-----------------------------|
| <b>General Setup and Accounting Records:</b> <ul style="list-style-type: none"> <li>• Account setup and company data setup and maintenance</li> <li>• User setup and access</li> <li>• Backups</li> <li>• Vendor maintenance</li> <li>• Customer records</li> <li>• Forms customizing</li> <li>• Product and service setup and maintenance</li> <li>• Employee maintenance</li> </ul> | 20              |                         |                             |
| <b>Transactions:</b> <ul style="list-style-type: none"> <li>• Check processing</li> <li>• Time tracking (Plus)</li> </ul>   | 30              |                         |                             |

|   |    |  |  |
|---|----|--|--|
| <ul style="list-style-type: none"> <li>• Estimates (Plus)</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>• Sales tax compliance</li> </ul> | 35 |  |  |
| <b>Interfaces and Miscellaneous:</b> <ul style="list-style-type: none"> <li>• Bank deposits</li> <li>• Interface with CPA</li> <li>• Customer service</li> <li>• Miscellaneous duties</li> </ul>                        | 15 |  |  |

### Job Behaviors Review

| Job Behaviors  | E | S | M | R | U | Examples |
|--|---|---|---|---|---|----------|
| How productive is this person?<br>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?<br>With co-workers? Boss?<br>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:**