

KANSAS JUDICIAL BRANCH Office Staff Performance Evaluation

For job classifications: Account Clerk II; Accounting Technician; Clerk Typist; Records Clerks II and III;
Trial Court Clerks II, III, IV and V; and Trial Court Clerk Coordinator

Effective Date: (mm/dd/yy)	Employee Name:	Employee ID:	Grade:
		Job Title:	Step:
District # and County: /	Dept. ID:	Rating Period: (mm/dd/yy) From:	To:

Review Type: Please check:

Probationary	Movement to step B	Movement to step D
Annual	Movement to step C	Movement to step E
Special		

SECTION I.

Instructions:

1. **Rating Duties:** First, make sure any duties added to your employee's position description are added to this evaluation. Next, mark ONE of the spaces provided for each duty. If your employee does not perform a listed duty, mark the space labeled *Not Applicable*. Mark the space labeled *Unacceptable* if your employee's performance of the duty fails to meet your standards. Mark the space labeled *Needs Improvement* if your employee's performance of the duty somewhat meets your standards but must be improved to fully meet your expectations. Mark the space labeled *Successful* if your employee's performance fully meets your expectations. Mark the space labeled *Beyond Expectations* only if your employee's performance is truly beyond what you would normally expect. This option should be used *only* for exceptional performance.
2. **Rating Categories:** Assign a rating of U for *Unacceptable*, S for *Successful*, or B for *Beyond Expectations* in the space to the left of each major job duty category after the duty ratings have been assigned.
3. **Full Performance Column (For employee on step C only):** Review the full performance definition below and apply it to each of the employee's assigned duties. Mark the space in the full performance column only if the employee is making satisfactory progress toward full performance or has demonstrated full performance of the duty.

Full Performance Definition

The state of possessing and applying knowledge, experience, abilities and personal attributes to perform independently all functions of the employee's position.

Category Rating U = Unacceptable S = Successful B = Beyond Expectations	Performance of this duty is rated:				Full Performance (step C only)
	<i>Not Applicable</i>	<i>Unacceptable*</i>	<i>Needs * Improvement</i>	<i>Successful</i>	
Supervision/Lead Worker Duties Developing and implementing employee training and development Evaluating Employees Managing employee leave Providing guidance and information to staff Developing policies and recommending procedures Supervising necessary cross-training Distributing workload evenly among employees Recruiting and hiring Managing timesheets	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____

* Any duties rated *Unacceptable*, *Needs Improvement*, or *Beyond Expectations* require additional documentation in Section II of this form.

Category Rating U = Unacceptable S = Successful B = Beyond Expectations	Performance of this duty is rated:	Full Performance (step C only)
	Not Applicable Unacceptable * Needs * Improvement Successful Beyond * Expectations	
Supervision/Lead Worker Duties (cont.)		
Completing, submitting and maintaining other personnel and payroll documentation		
Handling grievances and complaints		
Ensuring staff coverage on a daily basis		
Serving as a coach or mentor to other employees		
Providing regular ongoing feedback to staff		
Assisting coworkers		
Coordinating office management efforts with the chain of command		
Fiscal and Budget Duties		
Purchasing		
Receipting and adjusting		
Disbursing money		
Transferring money		
Completing month-end and year-end reconciliation		
Handling investment accounts		
Balancing daily transactions accurately		
Balancing monthly transactions accurately		
Completing required reporting forms		
Vouchering		
Court Duties		
Setting trials and hearings		
Tracking and monitoring the location of court files and record materials		
Preparing files and indexes		
Informing jury clerk of jury trial schedules		
Issuing summonses and information for jury duty		
Setting and removing cases from trial calendar		
Entering appearance dockets timely and accurately		
Preparing quarterly case termination reports		
Preparing weekly statistics		
Completing statistical tracking in a timely manner		
Handling caseload management measures in a timely manner		
Issuing court documents in a timely manner (summons,subpoenas,garnishments,etc)		
Following state and local court policies and procedures		
Handling problems in the absence of the clerk		
Applying information from manuals to complete transactions		
Working in other offices as assigned		
Finding and correcting errors		
Serving as bailiff		

Category Rating U = Unacceptable S = Successful B = Beyond Expectations	Not Applicable	Performance of this duty is rated:				Full Performance (step C only)
		Unacceptable *	Needs * Improvement	Successful	Beyond * Expectations	
Office Duties						
Copying, sorting and filing documents	_____	_____	_____	_____	_____	_____
Reviewing files and/or documents for accuracy and completeness	_____	_____	_____	_____	_____	_____
Preparing records for microfilming or scanning	_____	_____	_____	_____	_____	_____
Maintaining records	_____	_____	_____	_____	_____	_____
Stamping and preparing incoming and outgoing mail (pickup and delivery)	_____	_____	_____	_____	_____	_____
Screening visitors and callers	_____	_____	_____	_____	_____	_____
Answering phones in a professional and courteous manner	_____	_____	_____	_____	_____	_____
Maintaining appointment calendar	_____	_____	_____	_____	_____	_____
Taking and transcribing dictation accurately	_____	_____	_____	_____	_____	_____
Operating office equipment: computers, software programs, copiers, phones, recording equipment, etc.	_____	_____	_____	_____	_____	_____
Composing letters and documents	_____	_____	_____	_____	_____	_____
Handling requests for information	_____	_____	_____	_____	_____	_____
Maintaining office supplies	_____	_____	_____	_____	_____	_____
Inventorying property	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
Public Relations Duties						
Working with public in routine and difficult situations	_____	_____	_____	_____	_____	_____
Serving as information resource to public, court, staff, and OJA	_____	_____	_____	_____	_____	_____
Providing courteous service to coworkers and public	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

SECTION II.

1. Use the space below to explain your evaluation of any duties on which you rated your employee's performance as *Unacceptable*. Use and attach additional pages if necessary.

2. Use the space below to explain your evaluation of any duties on which you rated your employee's performance as *Needs Improvement*. Use and attach additional pages if necessary.

3. Use the space below to explain your evaluation of any duties on which you rated your employee's performance as *Beyond Expectations*. Use and attach additional pages if necessary.

4. After reviewing the current position description, note any new duties or other changes in the duties you wish the employee to undertake during the next year. These changes should be noted on an updated position description.

5. Goals for the employee during the next review period:

OVERALL PERFORMANCE RATING:

- _____ ***Beyond Expectations*** - Performance far exceeds the normal scope of the job requirements. It represents a level of performance that is rare and unusual. The employee cannot receive a rating of *Beyond Expectations* unless two or more duty categories have been rated as *Beyond Expectations* and none has been rated as *Unacceptable*.
- _____ ***Successful*** - Performance demonstrates competence and skill at one's job.
- _____ ***Unacceptable*** - Performance fails to meet the requirements of the position. An employee may receive a rating of *Unacceptable* if one duty category has been rated *Unacceptable*. The employee must receive a rating of *Unacceptable* if more than one duty category is rated *Unacceptable*.

FULL PERFORMANCE (For employee on step C):

1. During this rating period, the employee:
- _____ Made satisfactory progress overall toward full performance (employee must receive an overall performance rating of at least *Successful* or better.)
- _____ Did not make satisfactory progress overall toward full performance.
2. After three years on step C, the employee:
- _____ Demonstrates full performance of all duties of the position (only for employee with three *Successful* or better overall performance ratings while on step C)
- _____ Does not demonstrate full performance of all duties of the position

