



## Payroll/Benefits Administrator

### Administrative Procedure 2.C.220

Board Governance Policy Cross Reference: 1, 2, 3, 4, 12, 13, 16

Legal Reference:

Date Adopted: October, 1997

Date Amended: October 2006

### Payroll/Benefits Administrator EVALUATION FORM

Name: \_\_\_\_\_

Date: \_\_\_\_\_ Completed by: \_\_\_\_\_

Ratings: Outstanding    **Very Good**    Satisfactory    Needs Improvement    Not Applicable

**Outstanding**    Outstanding is unusual. Genuine “outstanding” performance means performance that is all one can possibly expect in all phases of the work. “outstanding” work performance means a degree of performance that can be achieved but rarely maintained. All ratings of “outstanding” must be accompanied by a written statement containing specific examples that demonstrate the nature of the outstanding performance.

**Very Good**    Very Good means that the employee meets requirements of his/her position satisfactorily throughout the rating period, and in addition consistently performs at a level above such requirements in many areas of his/her total work performance.

**Satisfactory**    Satisfactory means the performance of an employee who consistently meets the requirements of his/her position in a satisfactory manner throughout the rating period. By this standard he/she is a worker who has produced what can be reasonably be expected of a fully competent person in the position.

**Needs Improvement**    Needs improvement means the performance does not meet all requirements of the position, and hence falls below the average of the work group. A “Needs Improvement” rating indicates a positive need for a discussion between the employee and his/her supervisor regarding the shortcomings. A suggestion on how to improve must accompany this comment.

**Not Applicable**    Not applicable means that the particular job characteristic is not an expectation for this employee as part of his/her regular duties at this time.

**JOB RELATED SKILLS**

1.	Ensure that employees of the Division receive payment for services promptly in accordance with all salary contracts and collective agreements.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
2.	Prepare, ensure accuracy and process all entries for payrolls for computer processing including calculation of all hours of work and overtime for hourly paid staff, substitute teachers, bus drivers' and mechanics salaries, and teaching staff salaries.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
3.	Verification of all teacher qualifications and experience with the Professional Certification Branch of Manitoba Education, Citizenship and Youth.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
4.	Reconcile and process all remittance data for all benefits, government deductions and agencies and prepare the necessary information for Accounts Payable.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
5.	Prepare and process Direct Deposit transfers/Payroll Cheques and distribute itemized statements of earning and deductions for all employees.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
6.	Be available to serve as a backup for the Substitute Teaching booking as required.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
7.	Enter data in the Substitute Booking system as required.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
8.	Prepare all record of employment insurance forms for laid-off and terminated employees and complete all requests for payroll information for employment insurance purposes.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
9.	Balance, issue and distribute all T4 forms and prepare annual T4 summary.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
10.	Prepare the annual Workers Compensation return and provide information on injury claims as required.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
11.	Reconcile the payroll bank account on a monthly basis.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
12.	Maintain accurate and current information regarding each employee's vacation entitlement, sick and other leave accumulations and salary updates.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
13.	Maintain complete employee files.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
14.	Verify class and experience for all new teachers.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
15.	Administrative Pension Plans, Group Insurance Plans, LTD Plans, Blue Cross Plans, CUPE and MTS fees, Canada Savings Bonds and other such plans that the Division may enroll in.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
16.	Assist the Secretary-Treasurer with the preparation of all appropriate material for the annual audit.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>

17.	Provide credit information and references to organizations out-side the Division in accordance with regulations and statistics.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
18.	Maintain a database of all extra curricular field trips.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
19.	Receive applications for substitutes and prepare and distribute a substitute list as required.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
20.	Receive Child Abuse and Criminal Record checks, report questionable reports to Senior Administration and maintain on file.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
21.	Prepare and distribute all new teacher contracts.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
22.	Placement of posting and advertising for personnel.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
23.	Receive, verify and distribute all hiring forms, resignation/retirement letters and any other personnel related correspondence to appropriate areas.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
24.	Compose and type routine correspondence and memos as it relates to personnel issues (hiring, resignation, retirement, etc.).	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
25.	Generate and distribute a directory of all staff and update as required.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
26.	Maintain the necessary records for employee recognition and retirement.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
27.	Operate as a member of the Evergreen Support Centre office team to maintain an efficient and effective telephone system, to maintain the office kitchen and to respond to other cross-related tasks that may be identified by the team or senior administration.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
28.	Communicate with division office personnel – in person, by phone or by correspondence – in a manner both to enhance the efficient and business-like operation of the Payroll Department and to create a good public relations image.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
29.	Perform other duties as assigned.	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
30.	Attendance	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
31.	<b>PUBLIC RELATIONS</b>					
	a) works positively as part of the ESC team	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
	b) interacts positively with other staff	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
	c) interacts positively with the public	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
32.	<b>PERSONAL QUALITIES / ATTRIBUTES</b>					
	a) punctuality	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
	b) dependability	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>

c) cooperation	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
d) enthusiasm	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
e) judgement	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
f) adaptability	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
g) confidentiality	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
h) personal appearance	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
i) attitude to work	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
j) accepts responsibility	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>
k) accepts direction	<b>O</b>	<b>VG</b>	<b>S</b>	<b>NI</b>	<b>NA</b>

Comments:

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## Growth Plan (Summary)

Name: \_\_\_\_\_ Date: \_\_\_\_\_

1. General Information – position description

2. Growth Plan (Goals)

3. Areas of Strength:

4. Suggestions for Improvement:

5. Recommendations/Conclusions:

I have read and received a copy of the evaluation.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Evaluator's Signature

\_\_\_\_\_  
Date

Comments: (additional sheets may be added if required)