

**ADMINISTRATIVE CLERK
Training Needs Assessment Evaluation Form**

Personal/Position Information

Name: _____

Period Covered: _____

Position: _____

Reviewed by: _____

Title: _____

Position Start Date: _____

Community: _____

Region: _____

ADMINISTRATIVE CLERK

Training Needs Assessment Evaluation Form

Instructions:

The information contained in this evaluation is strictly confidential. The supervisor will meet with the employee to review the employee's performance and complete the Community Government Training Needs Assessment Evaluation Form. Input from the employee is critical. The employee will have an opportunity to make comments concerning the review in the employee comments section of this form. The information will be used to develop an individual training plan for the employee as well as a training plan for the community.

The employee will be rated as follows for each competency (P):

Each competency is to be rated as follows (S):

- 1 – Needs significant improvement – employee is unable to complete the task or perform the function in a satisfactory manner even though assistance is routinely provided
- 2 – Needs improvement - employee can complete the task or perform the function with considerable assistance
- 3 – Satisfactory – employees can complete the task or perform the function in a satisfactory manner with little or no assistance
- 4 – Very good – employee consistently completes the task or performs the function in an above average manner with little or no assistance
- 5 – Outstanding – employee consistently completes the task or performs the function at a very high level with little or no assistance

- 1 – Competency has little significant to the position
- 2 – Competency has minor significance to the position
- 3 – Competency is important to the position
- 4 – Competency has major significance to the position
- 5 – Competency is critical to the effective performance of the position

For more information on how to complete this review please contact the Regional Office of the Department of Municipal and Community Affairs or the MACA School of Community Government.

ADMINISTRATIVE CLERK

Training Needs Assessment Evaluation Form

Major Category	Skill	Sub-Skill
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Financial Management

Perform cash management

Follow GAAP	Collect and deposit funds	Monitor spending															
P	S	4	P	S	4	P	S	4									

Administer finances

Order office supplies	Prepare financial correspondence	Assist with preparation for audit															
P	S	4	P	S	3	P	S	3									

Administer the payroll system (back-up)

Set up employee files	Process TD1s	Calculate salary	Calculate employee benefits	Calculate group insurance plan contributions	Calculate pension plan contributions												
P	S	4	P	S	4	P	S	4	P	S	4	P	S	4	P	S	4

Calculate source and misc. deductions	Calculate payroll tax	Verify time sheets	Process/ input payroll on ACCPAC	Verify data entries	Prepare WCB premium reports												
P	S	4	P	S	4	P	S	4	P	S	4	P	S	4	P	S	4

Prepare and remit source deductions	Prepare and remit payroll tax	Update in-lieu time															
P	S	4	P	S	4	P	S	4									

ADMINISTRATIVE CLERK

Training Needs Assessment Evaluation Form

Major Category	Skill	Sub-Skill
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Financial Management

Process financial transactions (accounts payable)

Reconcile payable	Reconcile petty cash	Prepare aged vendor listing	Prepare AP journal summaries	Prepare batches for data entry	Record all cheques in log book
P S 4	P S 4	P S 4	P S 4	P S 4	P S 4

Maintain listing of accounts payable	Maintain updated vendor files and file numbers	Prepare invoices	Verify invoices	Issue invoices	Collect receivables
P S 3	P S 3	P S 4	P S 4	P S 4	P S 4

Issue receipts	Issue customer statements	Make bank deposits	Reconcile accounts receivable	Prepare aged customer listing	Prepare AR journal summaries
P S 4	P S 4	P S 4	P S 4	P S 4	P S 4

Financial Management

Possess knowledge of financial management

Possess knowledge of accounts payable	Possess knowledge of accounts receivable	Possess knowledge of general ledger systems	Possess knowledge of payroll systems	Possess knowledge of financial resolutions	Possess knowledge of financial legislation
P S 4	P S 4	P S 4	P S 5	P S 3	P S 3

Possess knowledge of financial systems	Possess knowledge of bookkeeping procedures	Possess knowledge of office procedures			

ADMINISTRATIVE CLERK

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Major Category	Skill	Sub-Skill																																								
Executive Functions/ Council Support	Ensure compliance	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%; text-align: center;">P</td><td style="width: 10%;"></td><td style="width: 10%; text-align: center;">S</td><td style="width: 10%; text-align: center;">4</td> <td style="width: 10%; text-align: center;">P</td><td style="width: 10%;"></td><td style="width: 10%; text-align: center;">S</td><td style="width: 10%; text-align: center;">5</td> <td style="width: 10%; text-align: center;">P</td><td style="width: 10%;"></td><td style="width: 10%; text-align: center;">S</td><td style="width: 10%; text-align: center;">3</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td colspan="4" style="padding: 5px;">Identify applicable legislation</td> <td colspan="4" style="padding: 5px;">Demonstrate familiarity with applicable legislation</td> <td colspan="4" style="padding: 5px;">Comply with applicable legislation</td> <td colspan="4" style="padding: 5px;">Comply with policies and procedures</td> <td colspan="4" style="padding: 5px;">Comply with Union Agreement</td> </tr> </table>	P		S	4	P		S	5	P		S	3									Identify applicable legislation				Demonstrate familiarity with applicable legislation				Comply with applicable legislation				Comply with policies and procedures				Comply with Union Agreement			
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Technical Skills	Possess computer skills	Operate computerized accounting programs																																				
		MMOS – Vadem System																																				
		Use word processing programs																																				
		Use spread Sheet software																																				
		Operate e-mail and Internet																																				
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P				S	5	P				S	4	P				S	4	P				S	4	P				S	3									
Human Resource Management	Work in a team environment	Work cooperatively with other																																				
		Oversee casual employees																																				
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Human Resource Management	Administer personnel policies	Administer personnel policies																																				
		Administer employee benefit plans																																				
		Maintain personnel records																																				
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Communication	Use effective communication	Read and comprehend business documents																																				
		Write clearly and concisely																																				
		Practice listening skills																																				
		Speak effectively																																				
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P				S	4	P				S	3	P				S	4	P				S	4															
	Maintain public relations	Maintain employee relations																																				
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ADMINISTRATIVE CLERK

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Major Category	Skill	Sub-Skill
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Professionalism

Demonstrate good work habits

Manage stress	Take direction	Motivate self	Demonstrate dependability and accountability	Maintain confidentiality	Make decisions
P S 4	P S 4	P S 4	P S 5	P S 5	P S 4

Manage time	Demonstrate willingness to perform alternate duties as required	Demonstrate punctuality	Demonstrate flexibility	Demonstrate organizational abilities	Work with minimal supervision
P S 4	P S 4	P S 5	P S 4	P S 5	P S 5

Meet deadlines	Employ analytical skills	Demonstrate responsibility	Be a team player	Cooperate with others	Respond positively to others
P S 5	P S 5	P S 5	P S 5	P S 5	P S 5

Demonstrate positive personal attributes and ethical behaviour

Accept change	Adapt to situations	Compromise	Separate personal and professional life	Pursue personal and professional development	Demonstrate patience
P S 4	P S 4	P S 4	P S 4	P S 4	P S 5

Demonstrate positive personal attributes and ethical behaviour

Maintain a positive attitude	Demonstrate honesty	Possess sense of humour	Display tact	Demonstrate diplomacy	Demonstrate courtesy
P S 4	P S 5	P S 4			

ADMINISTRATIVE CLERK
Training Needs Assessment Evaluation Form

Comments:

1. Supervisor's comments

2. Expectations for the coming year/workplan

**ADMINISTRATIVE CLERK
Training Needs Assessment Evaluation Form**

3. Employee goals and objectives

4. Career Goals

**ADMINISTRATIVE CLERK
Training Needs Assessment Evaluation Form**

5. Recommended training

6. Employee Comments

Employee:	Supervisor:
Title:	Title:
Signature:	Signature:
Date:	Date: