

**HOUSING ADMINISTRATIVE CLERK  
Training Needs Assessment Evaluation Form**

**Personal/Position Information**

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

Period Covered: \_\_\_\_\_

Position: \_\_\_\_\_

Reviewed by: \_\_\_\_\_

Title: \_\_\_\_\_

Position Start Date: \_\_\_\_\_

Community: \_\_\_\_\_

Region: \_\_\_\_\_

# HOUSING 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 Performance 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.

# HOUSING ADMINISTRATIVE CLERK

## Training Needs Assessment Evaluation Form

Major Category	Skill	Sub-Skill																													
<b>Financial Management</b>	<b>Process financial transactions</b>	Receive and verify invoices and requisitions	Verify that transactions comply with financial policies and procedures	Prepare, verify and process invoices and coding payment documents	Data enter invoices for payment	Process back-up reports after data entry	Administer the sorting, verification and preparation of cheques for utilities	P		S	5	P		S	4	P		S	5	P		S	5	P		S	5	P		S	5
		Compile consumption reports on spreadsheets	Print and distribute monthly financial reports	Record and count daily revenues	Make bank deposits in general and damage deposit accounts	Receive tenant rental and damage payments and issue receipts	Record transactions in tenant ledger cards	P		S	5	P		S	5	P		S	4	P		S	5	P		S	5	P		S	5
	<b>Administer finances</b>	Order accountable forms	Prepare financial correspondence	Assist with preparation for audit				P		S	4	P		S	3	P		S	4												
		<b>Administer the payroll system</b>	Set up confidential casual and employee files	Process TD1s	Calculate salary	Calculate employee benefits	Calculate group insurance plan contributions	Calculate pension plan contributions	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S
	Calculate source and misc. deductions		Calculate payroll tax	Verify time sheets	Process/ input payroll	Verify data entries	Verify coding and obtain signatures	P		S	5	P		S	5	P		S	5	P		S	5	P		S	5	P		S	4

# HOUSING ADMINISTRATIVE CLERK

## Training Needs Assessment Evaluation Form

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<b>Financial Management</b>	<b>Administer the payroll system</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Prepare and remit source deductions</td> <td style="width: 16.6%;">Prepare and remit payroll tax</td> <td style="width: 16.6%;">Update in-lieu time</td> <td style="width: 16.6%;">Prepare T4 and T4as</td> <td style="width: 16.6%;">Update leave credits</td> <td style="width: 16.6%;">Data enter payroll information</td> </tr> <tr> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> </tr> </table>	Prepare and remit source deductions	Prepare and remit payroll tax	Update in-lieu time	Prepare T4 and T4as	Update leave credits	Data enter payroll information	P	S	5	P	S	5	P	S	5	P	S	5	P	S	5	P	S	5
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P	S	5	P	S	5	P	S	5	P	S	5	P	S	5												
<b>Possess knowledge of financial management</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Possess knowledge of accounts payable</td> <td style="width: 16.6%;">Possess knowledge of general ledger systems</td> <td style="width: 16.6%;">Possess knowledge of payroll systems</td> <td style="width: 16.6%;">Possess knowledge of financial resolutions</td> <td style="width: 16.6%;">Possess knowledge of financial legislation</td> <td style="width: 16.6%;">Possess knowledge of financial systems</td> </tr> <tr> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> <td style="text-align: center;">P</td><td style="text-align: center;">S</td><td style="text-align: center;">5</td> </tr> </table>	Possess knowledge of accounts payable	Possess knowledge of general ledger systems	Possess knowledge of payroll systems	Possess knowledge of financial resolutions	Possess knowledge of financial legislation	Possess knowledge of financial systems	P	S	5	P	S	5	P	S	5	P	S	5	P	S	5	P	S	5	
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# HOUSING ADMINISTRATIVE CLERK

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<b>Perform Administrative Functions</b>	<b>Provide administrative support</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Maintain inventory files</td> <td style="width: 16.6%;">Monitor and order office supplies</td> <td style="width: 16.6%;">Prepare purchase orders</td> <td style="width: 16.6%;">Ensure the security and confidentiality of all financial and employee files</td> <td style="width: 16.6%;">Assist in the preparation of Board Meetings and contact Board members</td> <td style="width: 16.6%;">Maintain Board minutes</td> </tr> <tr> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> </tr> </table>	Maintain inventory files	Monitor and order office supplies	Prepare purchase orders	Ensure the security and confidentiality of all financial and employee files	Assist in the preparation of Board Meetings and contact Board members	Maintain Board minutes	P     S   5	P     S   5	P     S   5	P     S   5	P     S   5	P     S   5
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<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Receive and sort the mail</td> <td style="width: 16.6%;">Receive and direct tenant concerns</td> <td style="width: 16.6%;">Prepare work orders for maintenance</td> <td style="width: 16.6%;">Maintain and data enter complete works orders into the MMOS</td> <td style="width: 16.6%;">Prepare monthly and year end MMOS statements</td> <td style="width: 16.6%;">Ensure safe is secure</td> </tr> <tr> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> <td>P     S   5</td> </tr> </table>	Receive and sort the mail	Receive and direct tenant concerns	Prepare work orders for maintenance	Maintain and data enter complete works orders into the MMOS	Prepare monthly and year end MMOS statements	Ensure safe is secure	P     S   5	P     S   5	P     S   5	P     S   5	P     S   5	P     S   5		
Receive and sort the mail	Receive and direct tenant concerns	Prepare work orders for maintenance	Maintain and data enter complete works orders into the MMOS	Prepare monthly and year end MMOS statements	Ensure safe is secure									
P     S   5	P     S   5	P     S   5	P     S   5	P     S   5	P     S   5									
<b>Receptionist Services</b>	<b>Provide receptionist services</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Greet and assist visitors</td> <td style="width: 16.6%;">Answer phones</td> <td style="width: 16.6%;">Direct calls and respond to inquires</td> <td style="width: 16.6%;">Collect money and provide receipts</td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> </tr> <tr> <td>P     S   5</td> <td>P     S   4</td> <td>P     S   4</td> <td>P     S   4</td> <td></td> <td></td> </tr> </table>	Greet and assist visitors	Answer phones	Direct calls and respond to inquires	Collect money and provide receipts			P     S   5	P     S   4	P     S   4	P     S   4		
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P     S   5	P     S   5	P     S   5	P     S   3	P     S   3										
<b>Technical Skills</b>	<b>Possess computer skills</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Work cooperatively with others</td> <td style="width: 16.6%;">Oversee casual employees</td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> </tr> <tr> <td>P     S   5</td> <td>P     S   3</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>	Work cooperatively with others	Oversee casual employees					P     S   5	P     S   3				
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<b>Human Resource Management</b>	<b>Work in a team environment</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> <td style="width: 16.6%;"></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>												
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<b>Human Resource Management</b>	<b>Administer personnel policies</b>	Administer personnel policies	Administer employee benefit plans	Maintain personnel records																					
		P		S	3	P		S	5	P		S	5												
<b>Communication</b>	<b>Use effective communication</b>	Read and comprehend business documents	Write clearly and concisely	Practice good listening skills	Speak effectively	Maintain good employee relations																			
		P		S	4	P		S	3	P		S	5	P		S	4	P		S	4				
<b>Professionalism</b>	<b>Demonstrate good work habits</b>	Manage stress	Take direction	Be self-motivated	Be dependable	Maintain confidentiality	Make effective decisions																		
		P		S	4	P		S	5	P		S	5	P		S	5	P		S	5	P		S	4
	<b>Demonstrate good work habits</b>	Manage time	Perform related duties	Be punctual	Be flexible	Be organized	Work with minimal supervision																		
		P		S	5	P		S	4	P		S	5	P		S	4	P		S	5	P		S	5
		Meet deadlines	Use analytical skills	Be responsible	Be a team player																				
		P		S	5	P		S	5	P		S	5	P		S	5								
	<b>Demonstrate positive personal attributes and ethical behaviour</b>	Accept change	Adapt to situations	Compromise	Separate personal and professional life	Take training	Be patient																		
		P		S	5	P		S	4	P		S	5	P		S	5	P		S	5	P		S	5
	<b>Demonstrate positive personal attributes and ethical behaviour</b>	Maintain a positive attitude	Be honest	Possess a sense of humour																					
		P		S	5	P		S	5	P	4	S	4												

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Major Category	Skill	Sub-Skill
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<b>Professionalism</b>
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<b>Respect self and others</b>
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Display tact	Cooperate with others	Respond positively to others	Be courteous		
P	S	5	P	S	5
P	S	5	P	S	4
P	S	5	P	S	4
P	S	5	P	S	4

**HOUSING ADMINISTRATIVE CLERK  
Training Needs Assessment Evaluation Form**

**Comments:**

1. Supervisor's Comments

2. Expectations For The Coming Year/Workplan



# HOUSING ADMINISTRATIVE CLERK Training Needs Assessment Evaluation Form

## 3. Employee Goals And Objectives

## 4. Career Goals

# HOUSING ADMINISTRATIVE CLERK Training Needs Assessment Evaluation Form

## 5. Recommended Training

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## 6. Employee Comments

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