

M E M O R A N D U M

TO: All AMG Staff
FROM: Joe
RE: Personnel Moves
DATE: November 9, 1992

Effective November 9, 1992, Ava Powell will be working for the Accounting Department as the accounts payable clerk. Join me in wishing Ava good luck in her new position.

The new database administrator will be Kendra Degurse. All changes to the client data base need to be sent to Kendra.

The new graphics specialist will be Janette Zeedick. All graphics should be placed in Janette's box in word processing. Janette will also be responsible for entering information in the marketing database.

ASSET MANAGEMENT GROUP PERFORMANCE APPRAISAL FORM

Name MWA Powell
 Position Accounting clerk
 Rating Period From 10/24/94 to 10/24/95
 Rater/Time Joan Underhill
 Department Accounting
 Type of Review:
 Three Month Annual
 Probationary Special

Rating Scale Key	
1	Fails to meet requirements
2	Essentially meets job requirements
3	Fully meets requirements
4	Meets job requirements with distinction
5	Exceeds job requirements

Position: Accounting Clerk—Receivable/Payroll
 Duties and Responsibilities Payable

1 Communication Skills (Verbal and Written)

Rating	1	2	3	4	5
Self	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Comments:
Ava has excellent communication
skills - in both dealing
with customers and clients

2 Accounting System

Rating	1	2	3	4	5
Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comments:
Ava has mastered the A/P
system on Reatinum

3 PC Software/Lotus ?
Lotus Database
Access

Rating	1	2	3	4	5
Self	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:
Ava knows Lotus very
well and is training
Access.

4 Problem Solving	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comments: With Alma's organizational skills she is very good at problem solving. She has many opportunities to use her problem solving skills both with clients, accounts and with other employees.

5 Generally Accepted Accounting Principals and Procedures	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: Alma is very knowledgeable with account payable procedures and accounts receivable.

6 AMG Systems, Billing, Telephone, Expense, Payroll	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comments: Over the last year Alma has become our backup billing coordinator. She is extremely proficient with the expense system.

7 Organization	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

HAS ON MANY OCCASIONS SAVED US FROM PAYING BILLS THAT WERE NOT CORRECT - EITHER FROM MEMORY OR ORGANIZED FILES.

Comments: Could not ask for someone more organized.

I'm VERY COMFORTABLE THAT COMPANY FUNDS ARE WELL CARED FOR, AND GETTING APPROPRIATE ACCOUNTING TREATMENT. (S)

8 Judgment/Discretion	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Comments: Alice's judgments are always well thought out and she extremely discrete.

9 Cooperation/Attitude	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Comments: Alice's attitude is always great. She is always looking for the positive!

10	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ALWAYS willing to help out — we need to USE HER SKILLS TO THE FULLEST, — WITHOUT ABUSING THEM.

Comments: Alice should be commended for all the extra work and commitment she had while I was on leave — one of the

11	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: main reason no extra help was needed from outside the accounting dept.

SPECIAL ACCOMPLISHMENTS _____

AREAS THAT MUST BE CORRECTED IMMEDIATELY _____

EMPLOYEE COMMENTS

I feel very comfortable with present accounting procedures so maybe it's time to learn something new?

PERFORMANCE EVALUATION FOR THIS REVIEW PERIOD

Completed on Time

Not Completed on Time

*Very involved in new
Accounting system data base
Respond to expense questions
Prepare ~~ent~~ deferred
expense entry/Platium
month end Reconciliation
Prepaid expenses*

*Maybe next year for
new data base?*

PERFORMANCE GOALS FOR NEXT REVIEW PERIOD

Target Date _____

RESOURCES AVAILABLE FOR SKILL KNOWLEDGE

It would be helpful to send Ava to an Access class
once we are up and running. OK (M)

EMPLOYEE SIGNATURE: Auanella Powell DATE: 1/2/96

MANAGER SIGNATURE: Jean Vadakin DATE: 1/2/96

DEPT. HEAD/VP SIGNATURE: A, A DATE: 12/29/85

new duties: (Addition)

1. Do investment billings
2. Continue ~~to~~ to do monthly past due letters
3. Continue to do W-2 imputed income schedules and client's fees for tax dept.
4. Work on Access when it is up + going

ASSET MANAGEMENT GROUP PERFORMANCE APPRAISAL FORM

Name <u>Ava Powell</u> Position <u>Accounts Payable Clerk</u> Rating Period From <u>10/24/99</u> to <u>10/24/00</u> Rater/Time <u>Joan Beards</u> Department <u>Accounting</u> Type of Review: Three Month <input type="checkbox"/> Annual <input checked="" type="checkbox"/> Probationary <input type="checkbox"/> Special <input type="checkbox"/>	Rating Scale Key 1 Fails to meet requirements 2 Inconsistently meets job requirements 3 Fully meets job requirements with distinction 5 Meet job requirements with excellence
--	--

Position: Accounting Clerk—Payable						
Duties and Responsibilities						
	Rating	1	2	3	4	5
1 Communication Skills (Verbal and Written)	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments: <u>Ava gives good communication verbal & written.</u>						
	Rating	1	2	3	4	5
2 Accounting System	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments: <u>Ava knows some of the software but will be starting to learn it more.</u>						
	Rating	1	2	3	4	5
3 PC Software/Lotus	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments: _____						

4 Problem Solving	Rating Self Manager	1 <input type="checkbox"/> <input type="checkbox"/>	2 <input type="checkbox"/> <input type="checkbox"/>	3 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	4 <input type="checkbox"/> <input type="checkbox"/>	5 <input type="checkbox"/> <input type="checkbox"/>
Comments:		<p>She does great for problems that can come up with Act but taking the initiative in problem solving, she lacks that part.</p>				
5 Generally Accepted Accounting Principals and Procedures	Rating Self Manager	1 <input type="checkbox"/> <input type="checkbox"/>	2 <input type="checkbox"/> <input type="checkbox"/>	3 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	4 <input type="checkbox"/> <input type="checkbox"/>	5 <input type="checkbox"/> <input type="checkbox"/>
Comments:		<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>				
6 AMG Systems, Billing, Telephone Expense, Payroll	Rating Self Manager	1 <input type="checkbox"/> <input type="checkbox"/>	2 <input type="checkbox"/> <input type="checkbox"/>	3 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	4 <input type="checkbox"/> <input type="checkbox"/>	5 <input type="checkbox"/> <input type="checkbox"/>
Comments:		<p>Billing system was a little tough right away but she is starting to get real familiar with it now.</p>				
7 Organization	Rating Self Manager	1 <input type="checkbox"/> <input type="checkbox"/>	2 <input type="checkbox"/> <input type="checkbox"/>	3 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	4 <input type="checkbox"/> <input type="checkbox"/>	5 <input type="checkbox"/> <input type="checkbox"/>
Comments:		<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>				

8 Judgment/Discretion	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: Ava should try to start making a few more judgments on her own.

9 Cooperation/Attitude	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: When Ava started on GP she was a little hesitant but now with the comfortability of the system she is starting to come around with the GP system

10	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: _____

11	Rating	1	2	3	4	5
	Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: _____

SPECIAL ACCOMPLISHMENTS _____

AREAS THAT MUST BE CORRECTED IMMEDIATELY _____

EMPLOYEE COMMENTS

This has been an interesting year with all the changes from the HP 3000, but with all of us working together, I think it has gone as smoothly as possible.

PERFORMANCE EVALUATION FOR THIS REVIEW PERIOD

Completed on Time

Not Completed on Time

PERFORMANCE GOALS FOR NEXT REVIEW PERIOD

Target Date _____

RESOURCES AVAILABLE FOR SKILL KNOWLEDGE

EMPLOYEE SIGNATURE: Ma Powell DATE: 11/9/01
MANAGER SIGNATURE: Deon Russell DATE: 11/8/01
DEPT. HEAD/VP SIGNATURE: H. K. DATE: 11/8/01