

Accounting Case Rubric

Team/School Name: _____

Presentation Time: _____

Judge Name: _____

On a scale of 1 to 10, please shade the **single** grade you are assigning to each section. There is a page at the end of the assessment tool to identify areas of improvement and general comments.

INITIAL TASK IDENTIFICATION			
Case information used a) gather documents, b) compare transactions and balances, and c) identify discrepancies to be put into the Bank Reconciliation framework.			
Insufficient	Adequate	Proficient	Exceptional
<ul style="list-style-type: none"> ▪ Unclear or missing ▪ Information not identified ▪ Presenters simply restate case facts 	<ul style="list-style-type: none"> ▪ Somewhat clear ▪ The information vaguely identified 	<ul style="list-style-type: none"> ▪ Mostly clear ▪ Minor details missing 	<ul style="list-style-type: none"> ▪ Clearly defined and specific ▪ Tasks are accurately and completely done
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

COMPLETION OF RECONCILIATION STEPS			
Make adjustments based on discrepancies and accurately record in reconciliation template.			
Insufficient	Adequate	Proficient	Exceptional
<ul style="list-style-type: none"> ▪ Superficial or missing information ▪ No data 	<ul style="list-style-type: none"> ▪ Limited items and steps ▪ Partial data 	<ul style="list-style-type: none"> ▪ Thorough on information and steps ▪ Data requires very minor adjustments 	<ul style="list-style-type: none"> ▪ Comprehensive on steps taken and information ▪ Error free
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

CONCLUSION			
Finalize and verify bank reconciliation.			
Insufficient	Adequate	Proficient	Exceptional
Template incomplete <ul style="list-style-type: none"> ▪ Incomplete, missing or unsupported data or steps 	Template use is ... <ul style="list-style-type: none"> ▪ missing or partially complete ▪ partially supported 	Template use is ... <ul style="list-style-type: none"> ▪ mostly complete and accurate ▪ minor issues 	Template use is ... <ul style="list-style-type: none"> ▪ entirely complete and accurate and supported
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

RECOMMENDATIONS			
Follow-up items that require management action			
Insufficient	Adequate	Proficient	Exceptional
<ul style="list-style-type: none"> ▪ Missing 	<ul style="list-style-type: none"> ▪ Partially done ▪ Items for follow-up incomplete or supports missing 	<ul style="list-style-type: none"> ▪ Mostly detailed for both items and supporting reasons. ▪ Minor adjustments required 	<ul style="list-style-type: none"> ▪ Comprehensive list with supporting reasons ▪ No adjustments required

○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩
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QUESTION AND ANSWER Handled questions professionally and answers are consistent with recommendations			
Insufficient	Adequate	Proficient	Exceptional
<ul style="list-style-type: none"> ▪ Lacks knowledge, evades questions, or communicates poorly 	<ul style="list-style-type: none"> ▪ Partial knowledge ▪ Somewhat articulate 	<ul style="list-style-type: none"> ▪ Medium to high degree of knowledge ▪ Articulate 	<ul style="list-style-type: none"> ▪ Demonstrates expertise ▪ Communicates clearly and responds respectfully
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

DELIVERY AND PRESENTATION All members of the team are poised and confident during the entire presentation. Presentation completed within time limits. Comprehensive timeline and actionable plan/strategy for each recommendation.			
Insufficient	Adequate	Proficient	Exceptional
<ul style="list-style-type: none"> ▪ Not engaging ▪ Not very clear, no flow ▪ Presentation driven primarily by one student 	<ul style="list-style-type: none"> ▪ Partially engaging ▪ Somewhat clear ▪ Presentation given by one or two students 	<ul style="list-style-type: none"> ▪ Mostly engaging ▪ Mostly clear ▪ Presentation by most of the students 	<ul style="list-style-type: none"> ▪ Very engaging ▪ Very clear and flowed really well ▪ All members of the team contributed to an effective presentation
○ ① ② ③ ④	⑤ ⑥	⑦ ⑧	⑨ ⑩

Total Team Score: ___/60

Areas for Improvement:

Overall Comments:

Thank you!

****before returning your evaluation please ensure marks have been given (shaded) for each area****

Thank you!