Performance Review:

Supervisor/Manager Procedural Checklist

**Prior to performance review meeting**

**\_\_\_** Advise employee that performance review is due.

**\_\_\_** Provide the employee with a copy of the performance review form.

**\_\_\_** Set time and date for which the employee is to submit completed performance review forms.

**\_\_\_** Set time, date, and place for the performance review meeting.

**During the performance review meeting**

**\_\_\_** Review, with the employee, all ratings and make revisions if necessary

**\_\_\_** Accurately document all employee ratings of 1, 2 and 5.

**\_\_\_** Discuss each goal or objective established for the employee. (Use job descriptions as a guide

if possible.

**\_\_\_** Clarify all areas of agreement and define areas of disagreement.

**\_\_\_** Discuss all positive skills, traits, accomplishments, improvements, etc.

**\_\_\_** Commend specific employee accomplishments.

**\_\_\_** Provide a constructive account of what you think of the employee’s potential and ability.

**\_\_\_** Identify all areas where improvement is required.

**\_\_\_** Make and agree upon training and development recommendations.

**\_\_\_** Indicate consequences for non compliance.

**\_\_\_** Set Specific, Measurable, Attainable, Realistic goals which are Time bound.

**\_\_\_** Determine whether an interim evaluation is needed to address urgent performance issues.

**\_\_\_** Indicate approximate time of next appraisal, or interim evaluation, if necessary.

**\_\_\_** Reiterate specific expectations.

**\_\_\_** Inquire whether the employee has any questions or issues he or she would like to discuss.

**\_\_\_** Thank the employee for his or her contributions and anticipated effort.

**After the performance review meeting**

**\_\_\_** Complete the final performance review form, summarize results, and sign the form.

**\_\_\_** Obtain all required signatures

**\_\_\_** Provide a copy of the signed performance review form to the employee.

**\_\_\_** Send completed performance review form to Human resources.

Performance Review:

Employee Procedural Checklist

For the Employee: To be given to the employee prior to the performance appraisal interview.

**Before the performance review meeting**

**\_\_\_** Complete the “employee completion” section of the performance review form.

**\_\_\_** Submit to supervisor by the predetermined time and date.

**During the performance review meeting**

**\_\_\_** Be physically and mentally prepared

**\_\_\_** Be open and honest

**\_\_\_** Communicate main points clear and precise

**After the performance review meeting**

**\_\_\_** Follow through with the performance agreement brought forth during the performance review.