

New Performance Review Form Instructions:

1. Complete the Information Block:

Employee's Name:	
Title:	
Supervisor:	
Review Period:	

Review Period example:

Annual - 1/1/2012 - 12/31/2013 (Dates covered)

Probationary - 1/1/2012 – 12/31/2014

2. Review the Employee's position description and make any changes to the PD as needed. Have the Employee and Supervisor sign/date the PD with the changes (changes may be written on the PD.) Attach a copy of the PD to the Performance Review Form when submitting it to HR.
3. Attach a copy of previous year's goals (from previous year's performance evaluation) and your comments on the employee's progress toward reaching those goals.
4. Complete the Performance Competencies section of the form (#'s 1 through 9. Identifying where the employee falls according to the rating scale provided.) Please provide a brief explanation and example to support your rating scale.

5_ Exceptional:	Performance is consistently superior and significantly exceeds position requirements.	5_ Exceptional
4_ Exceeds Expectations	Performance frequently exceeds position requirements.	
3_ Meets Expectations	Performance consistently meets position requirements.	
2_ Improvement Needed	Performance meets some, but not all position requirements.	
1_ Unsatisfactory:	Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.	
N/A_ New/Not Applicable:	Employee has not been in position long enough to have demonstrated the essential elements of the position and will be reviewed at a later agreed upon date.	4_ Exceeds Expectations 3_ Meets Expectations 2_ Improvement Needed 1_ Unsatisfactory N/A_ New/Not Applicable

5. If the employee is a supervisor, complete Performance Competencies number 10 and 11.
6. Provide examples of the employee's performance that contributed to the employee's effectiveness in their position.
7. Provide examples of the employee's performance that require improvement for greater effectiveness (all employees can improve something).
8. Identify if the employee is ready for increased responsibility and what if any training would be needed for the employee to be successful.
9. Set performance goals for the employee for the upcoming year; make them specific, measurable, attainable, realistic and timely.
10. Set development goals for the employee for the upcoming year; make them specific, measurable, attainable, realistic and timely.

11. Identify how you as a supervisor will assist the employee with achieving the goals you have set.
12. Review the Performance Review with the employee;
 - a. allow the employee to review the form and make any additions or comments on the form
 - b. Have the employee sign the form
 - c. After the employee has signed the form you sign the form and provide the employee with:
 - i. A copy of the signed Performance Review
 - ii. Updated and signed position description
 - iii. Copy of last year's Performance Goals with comments
13. Forward the entire packet to HR.