
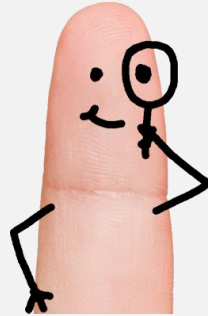


About the Document

name	PR-ALL-3180-M. Interim Performance Review Form
owner	HR
access & use	All Staff
what it is	<p>Performance review form that includes basic areas for review and discussion. Used for performance reviews in which a condensed form is more appropriate, for example:</p> <ul style="list-style-type: none"> ◆ Between formal annual performance reviews ◆ When an employee changes managers ◆ Doing a performance review for a temporary employee
who uses it	Employees eligible for an abbreviated performance review, and their managers
used with	<i>JE-ALL-3530-M. Job Description Form</i>
<p>Note: Once completed, the Performance Review Form contains sensitive information. Use caution and discretion when printing or leaving your desk with it on-screen.</p>	

Working with the Document

- ◆ Gray shaded form fields are input placeholders. To replace the text in these form fields, click **ONCE** on the field and type your new content.
- ◆ To insert a check inside a check box, double-click on the check box and under the **Default value** heading, select **Checked**.
- ◆ Table cells will expand to accommodate any length of text.
- ◆ If required, you can copy and paste to add additional tables to the form. In the upper-left corner of the table, click the  **move handle** to select the entire table, and then press **Ctrl + C** to copy it. Right-click in the destination location and press **Ctrl + V** (or right-click and select **Keep Original Table Formatting** from the **Paste Options**).
- ◆ If required, you can copy and paste to add additional rows to the tables. Place the cursor in a row, right-click, and select **Insert > Insert Rows Below**. Or, to copy and paste a row, select the



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The Form

Overview

The Interim Performance Review Form is divided into 4 sections:

- A. **Position Requirements & Competencies:** You and your manager comment on job-specific, technical skills in which you excel in your current position, plus those that would benefit from further development.
- B. **Success Traits:** You and your manager comment on success traits in which you excel in your current position, plus those that would benefit from further development.
- C. **Helping You Succeed:** You list 1-2 short-term career goals and suggest how your manager can help you achieve them.
- D. **Sign Off:** You and your manager sign off on the review. You may add brief comments to the form, or attach longer comments, if desired.

In general:

- ◆ Complete all the **Employee** fields in all sections of the form.
- ◆ When adding comments and examples, be specific.
- ◆ You may find it useful to refer to the *JE-ALL-3530-M. Job Description Form* for your position. This form describes the duties and responsibilities associated with a position, and the success factors and qualifications required for executing on those responsibilities. If you do not have a job description for your position, contact **CUSTOMIZER: Insert Contact's title, not name.**
- ◆ The form comes set up with 2 or 3 input tables per section (e.g., 3 areas where you excel, 2 goals, etc.). This doesn't mean you have to stick to that number of items. Delete or copy and paste additional tables in each section as needed.

Completing the Form

1. Open the *PR-ALL-3180-M. Interim Performance Review Form* and save a copy with the following file name convention: Doe_Jane_Interim_Performance_Review_2016_01_03.
2. Double-click on the page header to open it. Replace the **<Employee Name>** placeholder with your name, and enter the review period dates. In most cases, these span the previous year, for example, 01-Apr-14 to 31-Mar-15.
3. Complete the form electronically, not on paper.
4. Complete the fields in the Overview table. If you're unsure what to put in a field, leave it blank.
5. Complete sections A, B and C. Leave Section D blank. This will be completed with your manager following the interim performance review meeting.