

About the Document

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| 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.



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5. Your manager will forward the final completed form and any attachments to **CUSTOMIZER:**
Example: his/her supervisor and then submit it to HR.

The Form

Overview

The Interim Performance Review Form is divided into 4 sections:

- 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.
- 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.
- Helping You Succeed:** You list 1-2 short-term career goals and suggest how your manager can help you achieve them.
- 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.

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