

PERIODIC PERFORMANCE REVIEW

☐ Monthly

☐ Bi-Monthly

☐ Quarterly

☐ Other _____

Name:

Department:

Banner ID:

Appraisal Period:

Job Title:

Appraiser:

Date:

INSTRUCTIONS TO THE SUPERVISOR

(Please check as completed.)

- ☐ 1. Determine which phase of the performance management cycle this review falls within: Phase _____. This will aid in determining what needs to be covered with the employee.
- ☐ 2. Schedule a meeting date and time: Date _____ Time _____.
- ☐ 3. Let the employee know what will be discussed at the above meeting. Have the employee bring appropriate information if such is needed. Ensure that if the employee has items he/she would like to discuss, these are brought forth as well. Gather information you need to share with the employee. For example, if this meeting falls under Phase I, you might need to go over job duties—spell out the essential functions of the job and provide a job description, or it might be a meeting to set objectives or determine the frequency of future feedback meetings.
- ☐ 4. During the meeting discuss the items decided upon in #3. If, for example, this is a Phase II feedback meeting, review with the employee progress toward accomplishing objectives, unforeseen obstacles, concerns on either side, changes that need to be made, etc.
- ☐ 5. Use the space below and on back to make notes as needed regarding action items, changes agreed to, etc. **Provide a copy of this information to employee.**



HUMAN RESOURCES

LAMAR UNIVERSITY