TIMELINE FOR THE ANNUAL REVIEW PROCESS

Set a Yearly Schedule: All employees at the same time, on their anniversaries or some other schedule? Be Consistent!

STEP #1 One Month Before Review

Both parties review job description and make the changes *you* deem necessary.
Set the factors that will be rated.
Give employee the self-appraisal form with 2 weeks to complete & return.

STEP #2 Two Weeks Before Review

Using the updated job description and self-appraisal received from the employee, the supervisor writes the review and schedules the review date and time.

STEP #3 Hold Review

Using self-appraisal and supervisory appraisal, hold the performance review. Use a private room, allow enough time for it to be "conversational" and do not imply discipline.

STEP #4 Enter Review in the HRMS Job Record

a.) Effective Date (date review held)
b.) Review Type (probationary, performance, etc.)
c.) From/To Date (dates covered)
d.) Next Review Date (set next annual review date)
e.) Reviewer ID Number
f.) Factor Weight (% reviewer supervises this employee)

STEP #5 Review the Ratings Given

If all ratings were "competent" or above, congratulations! You're done for the year. Send the signed originals to HR for the official file.

STEP #6a If any rating was below "competent" set a follow-up review date.

STEP #6b Hold follow-up review to assess progress on issues addressed in the annual performance review.

9/26/2006