

How to Prepare for Conducting the Annual Performance Review

Ways a Supervisor Can Prepare for the Annual Performance Review

- Update yourself on the annual performance review process and system for the current annual review period by reviewing guidelines such as the *Annual Performance Review Guidelines* and *Performance Review System User Guide* and training resources such as video tutorials found on the [Employee Performance Management](#) and the [Manager's Toolkit](#) websites.
- Verify which employees are eligible for an annual review.
- Ensure that you closely check the:
 - Employee's position description and gather documentation related to the employee's job performance for this period:
 - To access an employee's position description, go to the [UA PageUp Recruitment Portal](#). From the side bar, select "Manage Position Descriptions". Use the search criteria to find the position description position #, classification title, or incumbent's name.
 - Six behavioral expectations and gather documentation related to the employee's performance of these expectations for this period;
 - Five-tier rating scale and definitions.
- Look at the employee's prior year annual review if you conducted one.
 - Did the employee improve in areas needed?
- Determine the status of the employee's goals and objectives which were set for the current review period, if applicable.
 - Did the employee meet these goals/objectives? If so, to what extent?
 - If goals and objectives were set for the current review period but not yet added to the performance review system, direct the employee to do so and submit them to you.
- Consider asking the employee to complete a self-assessment in the performance review system (once available) to provide feedback on their performance of their job duties, behavioral expectations, and goals (if applicable).
- Anticipate any key issues or concerns that will need be addressed during the annual review process and gather documentation to show you have already brought the issue or concern to the employee's attention.
- Contact your [HR Business Partner](#) if you anticipate an employee may be receiving an overall rating of "Partially Meets Expectations" or "Does Not Meet Expectations" or if there are extenuating circumstances such as disciplinary action that may need to be factored into the overall rating.
- Start planning a schedule for holding the one-on-one meetings with employees since annual reviews are to be completed, to include the employee's acknowledgment, **by May 15.**