

# Wake Forest University

## Employee Instructions for Completing the Annual Performance Review Form

The following instructions are provided to assist you in completing the employee's portion of the Annual Performance Review form.

### 1. General

- a. The Human Resources Department has provided your supervisor with an Annual Performance Review form upon which to document your performance during the evaluation period.
- b. Your supervisor has been instructed to verify the appropriate information on the front of the form, attach a copy of your job description, and forward the review form and these instructions to you for completion of a self evaluation of your job performance. It is your responsibility to provide written feedback about your work performance during the annual review period as compared to the expectations established. This needs to be completed within the timeframe identified by your supervisor.

### 2. Employee Self Evaluation

#### a. Cover Page

Record and/or verify the requested information on the front of the review form and read the general instructions on the front cover of the form.

#### b. Evaluation of Primary Job Responsibilities

- (1) Before beginning the self evaluation of your performance during the annual review period, transfer at least 3 and as many as 5 primary job responsibilities from your job description to the review form. At the discretion of your supervisor, he/she may choose to transfer the primary job responsibilities him/herself. If a primary job responsibility is too lengthy for the space provided on the review form, you may summarize it and transfer the summary instead.
- (2) Begin your self evaluation by reviewing the first "primary job responsibility" recorded on your job description and the performance expectation that was developed to evaluate your performance of that primary job responsibility. If you rate your performance as "Met Expectations (M)", you are encouraged but not required to provide comments. If you rate your performance as "Exceeded Expectations (E)", "Improvement Needed (I)", or "Failed to Meet Expectations (F)", you are required to provide comments to support your determination.

- (3) Your comments should focus on results achieved versus previously agreed upon performance expectations and any other pertinent comments which can be used to assist your supervisor in making an accurate assessment of your job performance during the review period. Do not provide an explanation or description of the responsibility!
  - (4) Proceed to rate each primary responsibility.
- c. Evaluation of Performance Factors
- (1) Provide a rating of E,M,I, or F for each performance factor that applies to you, including the factors that apply to supervisors if you supervise other employees, and any additional performance factors that may have been added by your supervisor.
  - (2) If you (and your supervisor) determine a factor does not apply, enter a rating of not applicable (“N/A”).
- d. Documentation and evaluation (rating) of goals, objectives, and special projects (if applicable) and results achieved – self explanatory.
- e. Evaluation (rating) of overall performance – self explanatory.
- f. Career Development
- (1) Complete Part I by listing all training programs, conferences, and courses you attended during the review period.
  - (2) Your supervisor will complete Part II after discussing a career development plan with you during the review discussion.
- g. After you have completed the various parts of the self evaluation, return the Annual Performance Review form to your supervisor. Your supervisor will complete his/her evaluation of your performance to include an overall performance rating and comments.
- h. Review Discussion
- Once your supervisor has completed the evaluation, he/she will schedule a time to meet with you to discuss the results of the review. Retain these employee instructions for use during the review discussion.
- i. Overall Rating Comments and Signature
- At the conclusion of the review discussion, your supervisor will complete Section II of Career Development and return the Annual Performance Review form to you for

comments regarding your overall rating and signature.

j. Dispute Resolution

If you and your immediate supervisor have substantial differences about the overall performance rating, it is recommended you seek advice and assistance from the appropriate department/office head (or designee). The Employee Relations Administrator in Human Resources is also available for guidance.

k. Please request a copy of the completed evaluation from your supervisor after review by the Department Head.