[Company name]

*How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue **[field]** until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.*

Performance Review Form - Annual Review

Formal annual review: competencies with ratings, achievements against objectives, overall rating, and the employee's view.

Document	Performance Review Form - Annual Review
Prepared by	**[Name and role]**
Owner	**[Name and role]**
Version	**[Version number]**
Date	**[DD Month YYYY]**
Review date	**[DD Month YYYY]**

Review details

Employee	**[Employee name]**
Role	**[Role]**
Department	**[Department]**
Manager	**[Manager name]**
Review period	**[Review period start]** to **[Review period end]**
Meeting date	**[Meeting date]**
Goals from last review attached?	**[Yes / No]**

Rating scale

Use one rating per competency. Every rating must be backed by evidence in the comment column.

Rating	Meaning	Use it when…
1	Needs improvement	Performance is below the standard the role requires.
2	Developing	Performance is partly there, but key gaps remain.
3	Meets expectations	Reliably meets what the role requires.
4	Exceeds expectations	Regularly goes beyond what the role requires.
5	Outstanding	Exceptional; a benchmark for others in the role.

[Company name]

Competencies

Enter one rating from the scale above, and a short evidence-based comment for each competency.

Competency	Rating	Evidence and comments
Job knowledge and technical skill	[1–5]	
Quality and accuracy of work	[1–5]	
Communication	[1–5]	
Teamwork and collaboration	[1–5]	
Initiative and problem-solving	[1–5]	
Planning and organisation	[1–5]	

Achievements against objectives

Judge each objective set last year against its outcome and evidence - not against memory.

Objective set last year	Outcome vs target	Evidence

Strengths and development areas

Field	Entry
Strength 1, with a specific example	
Strength 2, with a specific example	
Development area 1, with its impact	
Development area 2, with its impact	
Support to be offered	

Goals for next period

Agree the goals with the employee. Each goal must be measurable and have a due date.

[Company name]

Goal	How success is measured	Due

Overall assessment

Overall rating

Overall rating (one rating from the scale above): **[Overall rating 1–5]**

Reviewer comments

[Reviewer comments - summary of the year, key messages for the employee.]

Employee comments

[Employee comments - the employee's view of the review, in their own words.]

Do you agree with this review? **[Yes / No - explain if no]**

Support or training wanted next period: **[Support or training wanted]**

Working conditions note: **[Working conditions note]**

Signatures

Employee, manager and HR sign and date below. The employee receives a signed copy; the original is filed.

	Signature	Name	Date
Employee	**[Signature]**	**[Employee name]**	**[DD Month YYYY]**
Manager	**[Signature]**	**[Manager name]**	**[DD Month YYYY]**
HR	**[Signature]**	**[HR name]**	**[DD Month YYYY]**

Completion checklist

Done?	Check
	Every objective from last year is judged with evidence, not memory.
	Next period's goals are measurable and agreed with the employee.
	The employee has a signed copy and the original is filed.

Privacy: a completed form holds personal data about the employee. Store it securely and share it only with the people who need it - the employee, their manager, and HR.