[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 - Quarterly Check-in

A short, forward-looking check-in between the employee and their manager. A conversation record, not a formal rating.

Employee	**[Employee name]**
Role	**[Role]**
Manager	**[Manager name]**
Quarter	**[Quarter, e.g. Q1 YYYY]**
Conversation date	**[DD Month YYYY]**

Goal progress

Work through each goal set for this quarter. Status is one of: On track / At risk / Behind / Complete.

Goal	Status	Notes

Two-way feedback

Manager to employee

[What is going well, and one thing to focus on before the next check-in.]

Employee to manager

[The employee's view: what is working, what is not, and what would help.]

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

[Company name]

Next quarter

Priorities (up to three)

Priority	How success will be seen	Due

Support needed

Support or training the employee wants next quarter: **[Support or training wanted]**

Record

Conversation held between **[Employee name]** and **[Manager name]** on **[DD Month YYYY]**. No overall rating is given at a check-in; the agreed priorities above are carried into the next quarter.

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.