



Formal Appraisal Checklist

**Full process should be completed within a 2-week time span*

- 1. Employee completes Self-evaluation form.
- 2. Supervisors collect all data from the previous year to support form completion.
 - Includes mid-cycle touch base conversations, supporting documents, previous yearly reviews, etc.
- 3. Complete the Appraisal Form.
 - Compare your findings to self-evaluation, support answers with documentation from other areas (old evaluations, examples, employee communications, etc.)
- 4. Submit appraisal form - Savannah @ WF will Review.
 - May be asked to provide further evidence to support claims.
 - Review for guidance and accuracy.
 - Guidance to complete accurate scoring
- 5. Supervisors complete Edits/Changes on appraisal form based on WF review and resubmit when/if completed.
- 6. Crosstown Management receives completed drafts to complete the final review and provide feedback.
- 7. Crosstown Management provides final documents/feedback to WF, WF will review results/feedback with supervisors.
- 8. WF will assist Supervisors in coordinating the final steps of the Annual review process including changes, recommendations, and review meetings with employees.
- 9. Supervisors will conduct final appraisal meetings with employees and obtain final signatures.



- 10. Employee Follow Ups (If needed)
 - Follow-ups for Below effective Ratings.
 - Development (PIP) Plans
 - ◆ Biweekly 1 on 1 Training
 - ◆ 30/90-day probations
 - ◆ New performance evaluation once probations have ended