



Performance Appraisal Checklist for Employees

The following information serves as a general framework for effective performance appraisals. Please contact System HR at 217-333-2600 or erhr@uillinois.edu for assistance or advice.

Prepare for the meeting

- Review the organization's mission, vision, guiding values and goals in advance.
- Collect documentation you may need to support your appraisal. Examples may include
 - Listing of any non-mandatory trainings or educational programs you have completed or progressed in to enhance your knowledge, skills and abilities
 - Completed projects and their outcome and/or current projects and their status
 - Any recognition you received from co-workers, management, and/or internal and external clients or customers
 - Attendance records
 - Any other documentation or notes from previous discussions
- Review your job description to familiarize yourself with your job responsibilities, key tasks and performance expectations. Make note of any duties that have changed or been added since the last performance appraisal.
- Assess your strengths and areas for improvement. Evaluate your skills, abilities, and areas where you excel and identify areas where you may need additional training or support.
- Since the employee begins the performance appraisal process in the online system, [login](#) to the system.
- Reflect on your accomplishments and identify 2-3 specific projects, goals or tasks that you successfully completed or contributed to. If possible, provide data about the results or positive outcomes of your accomplishments.
- Outline any challenges or obstacles that hindered your success and provide specific examples.
- Review the previous goals since your last performance appraisal and summarize your success in accomplishing those goals.
- Identify any goals that are still in progress that you want to carry over into the next year.
- Add any new goals you want to prioritize in the next year. *Refer to the Writing SMART Goals [resource](#) on the performance appraisal website for guidance.*
- Provide any comments you want to share with your manager.

The Day of the Performance Review

- If you are meeting with your manager virtually, ensure that you have a stable internet connection and test the video and audio settings on your computer.
- If you are meeting with your manager in person, dress appropriately and arrive on time for the meeting. Bring paper and pen for taking notes.
- Organize and make easily accessible all the relevant documents for the discussion, including
 - Job description
 - Prior year's goals and accomplishments
 - Any new goals for the next year and what training or support you may need to accomplish your goals. *Refer to the Writing SMART Goals [resource](#) on the performance appraisal website for guidance.*



During the evaluation

- If you are meeting virtually, minimize distractions and refrain from multi-tasking. Turn on your video camera. This helps build rapport and being able to see facial expressions and body language is crucial for effective communication.
- Actively listen to your manager's comments, ask for clarification if needed and maintain a positive and professional attitude throughout the discussion.
- Identify any differences between your job description and responsibilities. Be prepared to provide examples.
- Discuss your personal and/or professional career goals.
- Identify additional contributions that might not be obvious or missed by your manager in the draft review.
- Share with your manager any challenges or obstacles that are hindering your success.
- Be prepared to discuss whether you need additional training, learning opportunities and/or development planning to achieve your goals.

Post-evaluation

- [Login](#) to the performance appraisal online system.
- Review, edit, and/or type any additional comments for the updated performance review routed to you by your manager.
- Document any comments you may have about the appraisal in the employee section of the document.
- Submit to route the form back to your manager to review and finalize. You and your manager will receive an email once submitted.
- Save a PDF copy or make a hard copy of the appraisal document for your files.