



Quarterly Performance & Check-In Review

Confidential – Internal Leadership Document

Quarter: _____

Review Date: _____

Employee Name: _____

Supervisor: _____

Purpose

This quarterly review is a **lightweight performance and alignment check** designed to:

- Reflect on the past 90 days
- Identify wins and friction
- Support personal and professional growth
- Adjust goals

This is developmental, not disciplinary.

1. Employee Self-Reflection (Completed Before Meeting)

A. Self-Grade

What grade would you give yourself this quarter? (A–F or 1–5)

Why?



B. Wins

What are you most proud of this quarter?

C. Energy & Workload

What felt energizing in your work?

What felt heavy or draining?

D. Goals Progress

What goals did you set last quarter?

Progress status:

- ☐ On track
- ☐ Completed
- ☐ Behind
- ☐ Needs revision

Notes:

2. Performance Snapshot (Supervisor Section)

Use brief commentary rather than long narrative.

A. Clinical Performance (Providers Only)

- ☐ Exceeding expectations
- ☐ Meeting expectations
- ☐ Needs support

Notes:

B. Patient Experience

- ☐ Strong positive feedback
- ☐ Consistent standard
- ☐ Improvement needed

Notes:

C. Documentation & Compliance

- ☐ On time and accurate
- ☐ Minor delays
- ☐ Needs improvement

Notes:



D. Operational Efficiency

- ☐ Efficient and proactive
- ☐ Stable
- ☐ Improvement needed

Notes:

E. Team Collaboration

- ☐ Strong contributor
- ☐ Consistent team member
- ☐ Needs communication support

Notes:

3. Check & Connect Conversation

A. Personal Check-In

How are they doing personally?

Any stressors or support needed?



B. Professional Check-In

Where do they feel confident right now?

Where do they feel stuck?

C. Development Focus

What skill or focus area should they prioritize next quarter?

What support or mentorship is needed?

4. Next Quarter Priorities

Set 1–3 focused, realistic goals.

1. _____
 2. _____
 3. _____
-



5. Action Items

Action Item	Owner	Deadline
-------------	-------	----------

Next Review Date: _____

Acknowledgment

This review is intended to support clarity, growth, and alignment.

Employee Signature: _____ Date: _____

Supervisor Signature: _____ Date: _____