

Date

Staff Member Name

Reviewer Name

Quarter (Circle one) 1,2,3,4

Personal Service Representatives Records Review

1. Customer record – SSN _____

- Record shows a clear assessment of services needed to meet customer objective.
Acceptable: Yes No (circle one)

Comment:

- Record has thorough employment plan consistent with assessment
Acceptable: Yes No (circle one)

Comment:

- Record shows follow up and appropriate services to meet customer goals
Acceptable: Yes No (circle one)

Comment:

2. Customer record – SSN _____

- Record shows a clear assessment of services needed to meet customer objective.
Acceptable: Yes No (circle one)

Comment:

- Record has thorough employment plan consistent with assessment
Acceptable: Yes No (circle one)

Comment:

Date

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- Record shows follow up and appropriate services to meet customer goals
Acceptable: Yes No (circle one)

Comment:

3. Customer record – SSN _____

- Record shows a clear assessment of services needed to meet customer objective.
Acceptable: Yes No (circle one)

Comment:

- Record has thorough employment plan consistent with assessment
Acceptable: Yes No (circle one)

Comment:

- Record shows follow up and appropriate services to meet customer goals
Acceptable: Yes No (circle one)

Comment:

4. Customer record – SSN _____

- Record shows a clear assessment of services needed to meet customer objective.
Acceptable: Yes No (circle one)

Comment:

Date

Staff Member Name

Reviewer Name

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- Record has thorough employment plan consistent with assessment

Acceptable: Yes No (circle one)

Comment:

- Record shows follow up and appropriate services to meet customer goals

Acceptable: Yes No (circle one)

Comment:

5. Customer record – SSN _____

- Record shows a clear assessment of services needed to meet customer objective.

Acceptable: Yes No (circle one)

Comment:

- Record has thorough employment plan consistent with assessment

Acceptable: Yes No (circle one)

Comment:

- Record shows follow up and appropriate services to meet customer goals

Acceptable: Yes No (circle one)

Comment:

Date

Staff Member Name

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Each of the 3 areas is reviewed in each customer record evaluated. The supervisor evaluates five customer records each quarter for 15 areas observed per quarter. Totals are cumulative from one quarter to the next.

Outstanding = 90% - 100%; Proficient = 80% - 89%; Unacceptable = 79% or lower

Quarter 1 Total acceptable observations = __ of 15 = __%
[13 = outstanding; 12 = proficient]

Quarter 2 Total acceptable observations = __ of 9
Q1 + Q2 Cumulative total = __ of 30 = __%
[27 = outstanding; 24 = proficient]

Quarter 3 Total acceptable observations = __ of 9
Q1+Q2+Q3 Cumulative total = __ of 45 = __ %
[40 = outstanding; 36 = proficient]

Quarter 4 Total acceptable observations = __ of 9
Q1+Q2+Q3+Q4 Cumulative total = __ of 60 = __%
[54 = outstanding; 48 = proficient]