Klarstig

Finance Insurance Employee Performance Evaluation

Evaluate the relevant performance or experience against stated criteria. Record examples to explain each judgment and identify useful next steps.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Person service or activity evaluated *

Evaluation period *

Criteria used for this evaluation *

Quality against the stated criteria *

- ☐ Below expectations
- ☐ Meets expectations
- ☐ Exceeds expectations
- ☐ Insufficient evidence

Evidence and specific examples *

Strengths to maintain

Improvements and support needed *

Follow up date

Specific details

Role objectives and review period

Complete when relevant to this request.

Examples of results collaboration and agreed development actions

Operating context

Policy service or case reference

Complete when relevant to this request.

Relevant dates evidence and authorized review contact

Team specific details

Cost center ledger or finance reference

Complete when relevant to this request.

Budget allocation authorization reconciliation and supporting evidence

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

Klarstig / Daniel Petry · klarstig.ai · hello@klarstig.ai · support@klarstig.ai · 800-781-1775 · 11917 Laurel Ave., Forestville, CA 95436, USA