

Templates and policies from Eye Care Collective are provided for members and their practice of our service. Members and their practices may use this document as is, or as a starting point for their own documents. Eye Care Collective assumes no responsibility for the enforcement or effectiveness of its templates and policies.

# Final Month Review & Next Steps

## Final Month Review

1. **PERFORMANCE FEEDBACK:** outline how the employee met or exceeded expectations.

2. **EMPLOYEE FEEDBACK:** ask for their thoughts on the role, performance and growth opportunities, team and culture, etc.

3. **PROBATIONARY ASSESSMENT:** is the employee to be confirmed in their role?
  - a. **Yes** – send the employee a confirmation letter
  - b. **No** – document why the employee is not confirmed
    - i. Is the probationary period to be extended?
      1. **Yes** – extension will conclude on
      2. **No**

## Next Steps

To support employees who are confirmed in the role, managers should outline what to expect for the next months based on the discussion and agreements set in the probationary period.

**1. AMENDMENTS TO THE JOB DESCRIPTION**

**2. OBJECTIVES FOR THE NEXT REVIEW PERIOD**

**3. TRAINING OR LEARNING & DEVELOPMENT NEEDS:**

**4. MEETING CADENCE FOR MANAGER-EMPLOYEE 1:1s**

--