

Performance Review and Documentation Starter Kit

Use this worksheet before asking AI for drafting help. It keeps the human judgment where it belongs: with the manager, HR, and the organization.

Important: This guide is not legal advice, and it does not replace employer policy, HR review, privacy/security requirements, or legal counsel.

1. Before you draft: gather the facts

☐	Role, review period, and performance expectations are clear.
☐	Manager has real examples, not just impressions.
☐	Accomplishments are tied to outcomes or behaviors.
☐	Improvement areas are tied to observable gaps.
☐	Prior coaching or feedback has been summarized.
☐	Next-period expectations can be stated plainly.

2. Documentation cleanup checklist

☐	Replace labels with behavior: "missed three handoff deadlines" instead of "not dependable."
☐	Separate facts from interpretation.
☐	Include work impact when relevant.
☐	Note what was communicated and when.
☐	Flag missing context rather than filling it in.
☐	Confirm alignment with policy, practice, and HR guidance.

3. Do not enter into unapproved public AI tools

☐	Employee names or identifiers.
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☐	Medical, leave, accommodation, or protected-class information.
☐	Investigation records or witness statements.
☐	Compensation details or confidential business information.
☐	Information restricted by employer policy, privacy, security, or record-retention rules.

4. Human review before use

☐	The draft matches the actual facts.
☐	No sensitive information was exposed unnecessarily.
☐	The tone is clear, fair, and appropriate to the situation.
☐	The draft does not imply legal certainty.
☐	Required HR, policy, or legal review has happened.
☐	The final communication reflects human judgment.

Responsible AI prompt starter

Help me create a fact-based first draft for HR/manager review. Use the anonymized notes below. Do not invent facts, dates, examples, motives, or outcomes. Separate observable behavior, impact, prior feedback, and expectations going forward. Use neutral, professional language. Flag assumptions, missing information, and anything that may require HR, policy, privacy, or legal review.

Next step

Use this kit with PromptEdge performance and documentation prompts. Start with 30 free prompts at promptedge.net.