

Hannah Mercer
Operations Manager
Employer HR file

Date: 14 July 2026
Our Reference: MPPC/5032E66D
Document Type: Checklist

PIP Progress Review Checklist

1. EXECUTIVE SUMMARY

This checklist supports the effective monitoring of Hannah Mercer's ongoing Performance Improvement Plan (PIP) following the third progress review held on 4 April 2025.

The review focused on supplier escalations, inventory accuracy, and handover documentation, including discussions on archived task-board changes and supplier responses.

Current outcome is 'More information needed' with the next review scheduled for 18 April 2025.

Key next steps involve gathering missing evidence, providing interim coaching, and clarifying ownership for the follow-up review to ensure continuous progress monitoring.

Attachments: PIP support plan | Review schedule | Amendment log

CHECKLIST DETAILS

Employee
Hannah Mercer

Role
Operations Manager

Case type
Monitor PIP Progress

Reference
HRA-5032E66D

KEY DATES

Completed
14 July 2026

First review
04 April 2025

REVIEW CONTROL

Review dates, standards and measurements should remain clear, measurable and recorded in writing.

Continued

PIP Progress Review Checklist

2. CHECKLIST OF TASKS FOR MONITORING PIP PROGRESS

Task: Confirm accuracy and completeness of the 4 April 2025 review record

Owner: Reviewing Manager / HR Team

Priority: High

Due date: Immediate

Evidence required: Finalised review meeting notes and any supplementary documents

Status: Pending

Completion notes: Ensure all discussion points and agreed actions are documented.

Performance Improvement Plan

Area for Improvement	Required Standard	Measurement	Review Date
Not recorded	Not recorded	Not recorded	Not recorded

Any changes to the facts, decisions, actions, evidence, responsibilities or review dates should be agreed in writing and recorded as an amendment to this document.

Follow-up Action Plan

Action	Owner	Due Date	Evidence Required	Status
Review the pip progress review record and confirm it reflects the agreed facts.	HR	04 April 2025	Completion note or supporting evidence	Open
PIP Progress Review Follow-up is due on 18 April 2025.	HR	04 April 2025	Completion note or supporting evidence	Open
Record a clear owner and review point for the performance improvement plan outcome.	HR	04 April 2025	Completion note or supporting evidence	Open
Review the Monitor PIP Progress record for missing facts, evidence, follow-up ownership or review safeguards before completion.	HR	04 April 2025	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	HR	04 April 2025	Completion note or supporting evidence	Open
File the final documents in the employee's personnel record.	HR	04 April 2025	Completion note or supporting evidence	Open

Attachments: [PIP support plan](#) | [Review schedule](#) | [Amendment log](#)

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PIP Progress Review Checklist

3. CHECKLIST OF TASKS FOR MONITORING PIP PROGRESS

Task: Collate additional evidence relating to supplier escalations, inventory accuracy and handover documentation

Owner: Reviewing Manager

Priority: High

Due date: Before next review on 18 April 2025

Evidence required: Relevant reports, data summaries and communications with suppliers

Status: Pending

Completion notes: Verify all evidence reflects current performance status accurately.

4. CHECKLIST OF TASKS FOR MONITORING PIP PROGRESS

Task: Provide interim coaching and support for Hannah Mercer

Owner: Line Manager / HR Business Partner

Priority: Medium

Due date: Ongoing until next review

Evidence required: Coaching logs, feedback and any development activity records

Status: In progress

Completion notes: Maintain records of support interventions for review transparency.

Attachments: [PIP support plan](#) | [Review schedule](#) | [Amendment log](#)

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PIP Progress Review Checklist

5. CHECKLIST OF TASKS FOR MONITORING PIP PROGRESS

Task: Schedule and confirm ownership of next PIP progress review on 18 April 2025

Owner: Reviewing Manager / HR

Priority: High

Due date: Immediate

Evidence required: Calendar invite, confirmation email or internal notification

Status: Overdue

Completion notes: Confirm responsible individual and ensure reminder set for follow-up action.

6. CHECKLIST OF TASKS FOR MONITORING PIP PROGRESS

Task: Review the Monitor PIP Progress record for completeness before finalisation

Owner: HR Team

Priority: Medium

Due date: Prior to filing

Evidence required: Completed checklist, review notes

Status: Pending

Completion notes: Cross-check all sections for factual accuracy and compliance with HR policies.

Attachments: [PIP support plan](#) | [Review schedule](#) | [Amendment log](#)

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PIP Progress Review Checklist

7. CHECKLIST OF TASKS FOR MONITORING PIP PROGRESS

Task: File final approved documents in Hannah Mercer's personnel records

Owner: HR Administrator

Priority: Medium

Due date: Upon completion of review

Evidence required: Signed records or electronically confirmed final documents

Status: Pending

Completion notes: Confirm document confidentiality and secure storage standards.

8. AMENDMENT LOG

Date: 14 July 2026 - Checklist created and aligned with latest review data

Reviewed by: HRHeaven Consultancy Team

Attachments: [PIP support plan](#) | [Review schedule](#) | [Amendment log](#)