

WEEKLY TRAINEE PROGRESS REPORT

Trainee _____

Manager _____

Date of Discussion _____

Date of next Discussion _____

1. Discuss Office Days

- a. Review the office days and approximate time spent on specific tasks
 1. Scheduling
 2. Confirmation Calls
 3. Audit Write Up

Are confirmation calls for the following week complete?

Are you scheduled for the next two weeks (check calendar)?

- b. What situation(s) caused you to be inefficient or less productive?
- c. How can I help?

2. Discuss Field Work Days

- a. Review daily schedule/calendar.
- b. What problems did you incur at audit?
- c. Explain how you attempted to handle them?
- d. Were you able to at least partially complete all of the audits on site?
- e. If not, why?

Specifically, how many audits are partially complete or totally incomplete, exactly?

Partial=

Total=

Are you waiting for information or are they ready to complete?

f. What time have you budgeted to complete audits still in write-up?

Specifically, Days and Times.

3. Did you submit your DAR/Expense Reports on Time? If not, why?

Questions?

4. Review Production and Production Expectations based on Experience Level.

Track Production over the past 4 weeks.

Week #1=

Week #2=

Week #3=

Week #4=

5. Follow up items for next week's review.

6. Additional comments on trainee's progress.