

Employee Performance Review

Employee Name: Jordan Michaels

Employee ID: HM-2047

Department: Mortgage Operations

Manager: Rebecca Torres, Director of Loan Processing

Review Period: January 1, 2025 – December 31, 2025

Document Type: HR Performance Review

Overall Performance Rating: Exceeds Expectations

Summary:

Jordan consistently demonstrates strong analytical skills, reliability, and a high level of ownership in loan processing workflows. Their attention to compliance requirements and documentation quality has materially reduced rework and underwriting delays. Jordan is a strong cultural contributor and has mentored two new team members during the review cycle.

Strengths:

- High accuracy in loan documentation review
- Strong cross-team communication with Underwriting and Compliance
- Consistently meets or exceeds processing SLAs
- Trusted to handle high-priority and time-sensitive cases

Areas for Development:

- Improve turnaround time during peak volume months
- Increase proficiency with new LOS automation tools

Manager Comments:

Jordan has been a key contributor to operational stability within the mortgage pipeline. Their professionalism and consistency have helped reduce processing bottlenecks, supporting our business goals. With additional focus on workflow automation, Jordan is well-positioned for future leadership opportunities.

Compensation & HR Notes:

- Merit Increase Eligibility: Yes
- Bonus Recommendation: 12% of base salary
- Promotion Consideration: Q2 2026 Review Cycle
- HR Representative: Melissa O'Neill

Signature Acknowledgments:

Employee Signature: _____

Manager Signature: _____

HR Signature: _____

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