

Behavior & Performance Tracker

For EAP Professionals & Managers – Bridging the Gaps

Instructions

- Use this tracker to **monitor trends in employee behavior, performance, or well-being** over time.
 - Focus on **observable behaviors and patterns**—do not include assumptions or personal judgments.
 - Maintain **confidentiality**; only authorized EAP or HR personnel should access completed trackers.
 - Review trends periodically to identify potential early interventions or support needs.
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Employee Information

Field	Fillable Text Field
Employee Name	
Department / Team	
Job Title	
Date Tracker Started	
Supervisor / EAP Assigned	

Daily / Weekly Observation Log

Date	Observed Behavior / Performance Notes	Stress Indicators	Positive Behaviors	Follow-Up / Action Taken	EAP Staff / Manager Initials
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Column Guidance:

- **Observed Behavior / Performance Notes:** Record objective behaviors or incidents.
- **Stress Indicators:** Signs such as fatigue, irritability, absenteeism, or withdrawal.
- **Positive Behaviors:** Highlight strengths, improvements, or engagement.
- **Follow-Up / Action Taken:** Document interventions, coaching, or referrals.
- **EAP Staff / Manager Initials:** Confirm who documented the observation.

Trend Analysis & Summary (Optional Section for EAP Staff)

Time Period	Notable Patterns	Recommended Support / Intervention	Notes
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Usage Tips:

- Complete at least weekly, or after notable events/observations.
- Compare entries over time to detect trends, potential concerns, or positive progress.
- Use this tracker in combination with the Workplace Wellness Questionnaire for a holistic view.

Confidentiality & Compliance Reminder

- Store completed trackers securely according to organizational policy.
- Share only with authorized personnel involved in the employee's support.
- Ensure compliance with **HIPAA, ADA, and internal HR/EAP policies**.