

Probationary Review Form

Employee name and job title	
Date employment commenced	Click or tap to enter a date.
Date of review meeting	Click or tap to enter a date.
Type of review meeting	Choose an item.
Date probation due to end	Click or tap to enter a date.
Date of next review meeting	Click or tap to enter a date.
Line Manager name and job title	

Agenda

- The purpose of probationary period review is to:
- Understand, from both the employee and line manager's perspective, what progress can be evidenced in role during the probation period
- Identify any development needs in relation to the job role (considering capacity and capability) and any reasonable adjustments that need to be put into place
- Understand any concerns about the job role or any concerns regarding progress in role
- Provide constructive feedback on the employee's performance
- Check-in on wellbeing and any other employment support needs
- Recommend whether probation is (also refer to outcomes section below):
 - a) On track for the period to be passed
 - b) The probation period needs to be extended
 - c) The probation period needs to be ended or alternative action should be taken

Outcomes of a Mid-Point Probation Review Meeting

Where the decision is to confirm a) probation is on track or b) the probation period needs to be extended, the following should also form part of the meeting agenda:

- Clear expectations should be set in how the employee can optimise their performance in their current role
- Clarity that such expectations are understood, timeframes for completion are known and the next steps in the process (continuation of probation process, or to move to appraisal process if probation is passed)
- Ensure objectives set are SMART (Specific, Measurable, Actionable, Realistic, Timely) and agreed for the next period to be reviewed (probation or appraisal)
- Identify any new / continuing development needs.

Outcomes of an End-Point Probation Review Meeting

Where the decision is c) to end probation period:

- If the probation period is ending because the employee has successfully completed it, a confirmation letter should be sent to the employee.
- If the probation period is ending for an alternative reason, the line manager and employee should clearly understand the reason(s) why such conclusion has been drawn and the evidence used to determine this outcome.
- The line manager should use the probation policy and process in place for next steps and seek advice and guidance from HR to ensure a fair and compliant process is followed.

Probationary Review Form

Summary comments on the employee's overall performance to date:

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Key Strengths in role:	Comments and any outcomes agreed for further action:
1.	
2.	
3.	

Key Areas of Development in role:	Comments and any outcomes agreed for further action:
1.	
2.	
3.	

Summarise the concluding notes agreed from the meeting:

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Agreed Actions:

Action	Who	Date for Completion
1.		Click or tap to enter a date.
2.		Click or tap to enter a date.
3.		Click or tap to enter a date.

Additional Feedback:

Employee:	
Line Manager:	

Signatures:

Line Manager Signature:		Date:	Click or tap to enter a date.
Employee Signature:		Date:	Click or tap to enter a date.
Date of Next Review:	Click or tap to enter a date.	Date this form and content was finalised and agreed:	Click or tap to enter a date.