

CONFIDENTIAL



PROBATIONARY REVIEW FORM

Employee Name:	Job Title:
Department:	Date of Joining/Promotion:
Line Manager:	Review Date (Month 1, 3 or 5):

Excellent = excellent in key areas and consistently meeting or exceeding expectations

Good = making a positive contribution and meeting expectations. Minimal action required.

Fair = performance acceptable but action required within an agreed timescale to develop further or to improve performance in this area to a more satisfactory standard.

Poor = performance unacceptable and causing concern. Immediate action and improvement required

	Excellent	Good	Fair	Poor
Quality of work				
Performance				
Attendance – Section %age				
Timekeeping				
Teamwork				
Communication Skills				

Comments:

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Training and/or Development Needs:

Actions Agreed:

I agree with the comments detailed on this form and any timescales or targets have been mutually agreed.

Employee Signature: _____

Line Manager Signature: _____

Date: _____

Final review (month 5 only)

Do you recommend that this employee has satisfactorily completed his/her probation period and that the post should be confirmed?

- Yes
- No*

Line Manager signature: _____

Date HR informed of decision: _____

*Probation period to be extended? (Following discussion with HR)

- Yes
- No

If probation should be extended, state improvements required (with timescales), any additional support needed and timetable for review:

Date set for Staff Development Career Review (SDCR): _____

Line Manager Signature: _____

Date: _____

Guidance notes on completion of this form

- Specific dates should be set for probationary review meetings, to help monitor the employee's progress effectively. These meetings should take place by the end of months 1, 3 and 5.
- The original form should be sent to the HR team for review and will then be filed in the employee's personal file. The HR team will give advice/support on any areas of concern.
- Please ensure that any copies of this form are held in a secure area (locked filing cabinet or drawer) by the Line Manager.
- The opportunity to review probationary employees shall be given at the monthly meetings between Line Managers and their HR Advisor.
- Attendance levels shall be given to Line Managers at their monthly meetings and probationary employees should have their percentage levels entered on the form which can then be compared with the section average.
- Please note that if an employee is covered by the DDA (Disability Discrimination Act), reasonable adjustments must be made to facilitate their integration into the workplace. The HR team will give advice and support for any employee covered by the DDA.
- Please ensure that a date is set for the employee's Staff Development Career Review at the final review meeting in month 5.