Probation review

One form for the whole probation period: the plan, check-ins and the final decision · meeting 30 minutes per check-in

01 HOW TO USE THIS FORM

1. Who: the line manager runs the meetings and fills in the form; HR checks the final decision before it goes to the employee.
2. Day one: give the probation length and conditions in writing. In the EU this is due within seven days; in the UK it belongs in the day-one written statement.
3. First two weeks: agree three to five objectives, what good looks like by the end date and the support or training the person will get.
4. Check-ins: for two months or less, one halfway; for three months, around day 30 and day 60; for six months, after months 1 and 3. Hold the final review at least two weeks before the end date, earlier if notice has to fit inside the probation, as in France.
5. Share the form before each meeting and give the person a copy of your notes after it. They can add comments and ask to see the whole record.
6. If the person is ill or away when a meeting is due, move the meeting. Time away moves the end date only where local law allows or requires it.
7. Extending: first check that the contract and local law allow it; in some countries they don't. Then agree what must improve, how you'll measure it and the new dates, and confirm it in writing before the original end date.
8. Not passing: don't decide it in this form. Hold a separate meeting, follow your procedure (in Germany, hear the works council first), give the reasons in writing and give at least the notice that the contract and the law require.
9. This record goes to the personnel file. Only the employee, their manager and HR see it. Keep it for [period under your retention policy], then delete it.

02 EMPLOYEE AND KEY DATES

Fill this in at the start, together with the plan. Check the length, notice and extension rules in the contract and in local law.

Employee	
Role and team	
Manager	
Country of employment	
Start date	
Probation length in the contract	
End date	
Check-in dates	
Final review (at least two weeks before the end date)	
Last day to confirm an extension in writing	
Time away that may move the end date (only where allowed)	None / Days: ____ New end date: ____

03 RATING SCALE

Rate against what you expect at this stage of the probation, not against an experienced colleague.

Rating	Label	What it means
1	**Not meeting expectations**	Clear gaps even with support. Agree what must change, by when, and what help is in place.
2	**Partly meeting expectations**	Progress in some areas, with specific gaps. Agree support and check again at the next meeting.
3	**Meeting expectations**	On track for this stage. A good result, not a middling one.
4	**Ahead of expectations**	Ahead of where we expect someone at this stage, with little guidance.
N/O	**Not observed yet**	No chance to show this so far. Say when it will come up.

04 PROBATION PLAN

Agreed in the first two weeks. Objectives can change if the role changes; note the date and who agreed it.

Objective	What good looks like by the end date	Support and training

05 CHECK-INS

One row per meeting. Rate overall progress for that stage on the scale above.

Meeting	What went well	What to improve, and support agreed	Rating
Check-in 1			
Check-in 2			
Final review			

06 OBJECTIVES AT THE FINAL REVIEW

Objective	Result, with evidence	Rating

07 WAYS OF WORKING

Give an example for every rating of 1, 2 or 4.

Area	What good looks like	Rating
Quality of work	Work is accurate and needs little rework for this stage.	
Learning	Picks up tools and processes, asks for help early and uses feedback.	
Reliability	Keeps agreed deadlines and tells the team early when plans change.	
Collaboration	Works well with the team and other teams and shares what they know.	
Conduct and values	Acts in line with the company's values and policies.	

08 THE EMPLOYEE'S VIEW

The employee fills this in before the final review.

What has gone well for you?

What has been harder than expected?

What support would help you most in the next six months?

What should we change in onboarding for the next person?

09 DECISION

Base the decision on the plan, the check-ins and the evidence above. Answer only the block that applies.

Decision

Confirm / Confirm early / Extend / Hold a separate meeting about ending employment

Reasons, with examples

Confirmed: written confirmation and any updated terms sent on

Extended: new end date, within the legal maximum

Extended: what must improve, how we'll measure it, check-in dates

Extended: confirmed in writing on (before the original end date)

Ending: date of the separate meeting, and the steps your procedure requires (companion, works council)

Ending: reasons given in writing on, notice period, how to appeal

10 AFTER PROBATION

Goals for the next six months

Development agreed

First regular performance review

11 COMMENTS AND SIGN-OFF

Employee comments

Signatures

Employee _____ Date _____ Manager _____ Date _____ HR _____ Date _____

Signing confirms the meeting took place and the employee received a copy. It does not mean they agree with every point.