

## About the Document

<b>name</b>	<b>PP-MGR-3110-M. Probationary Period Review Form</b>
<b>owner</b>	HR
<b>access &amp; use</b>	Restricted to Managers & HR
<b>what it is</b>	<p>A form that defines a position's success factors when a new employee is hired or an existing employee transfers to a new position.</p> <p><b>Used before employee is hired to:</b></p> <ul style="list-style-type: none"> <li>◆ Define a position's success factors</li> <li>◆ Ensure performance expectations align with candidate criteria before the search begins</li> <li>◆ Create interview questions</li> <li>◆ Create employment or position transfer agreements</li> </ul> <p><b>Used after the employee is hired to:</b></p> <ul style="list-style-type: none"> <li>◆ Set and communicate performance expectations during the probationary period</li> <li>◆ Review performance at the end of the probationary period</li> </ul>
<b>who uses it</b>	Hiring Manager completes the form and reviews it with employee at start and end of probationary period
<b>used with</b>	<ul style="list-style-type: none"> <li>◆ <i>JE-ALL-3530-M. Job Description Form</i></li> <li>◆ <i>JE-ALL-3510-R. List of Competencies</i></li> </ul>
<p><b>Caution:</b> These instructions and the accompanying form include sensitive information. They should not be shared with staff members who do not have responsibility for direct reports. Use caution and discretion when using, as even blank documents may be misunderstood without context.</p>	

## Why This Process is Important

The probationary period is the ideal time to provide feedback when an employee starts a new position. The longer the employee is left to work without feedback, the more cemented their way of working becomes, and the harder it will be to change their behavior and skills.

This template is included in the ConnectsUs HR™ Toolkits.



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- Pricing.

It may help to ask yourself this question: *“How will we know that the employee is likely to have long-term success in the position by the end of the probationary period?”*

- c. **Success Traits:** In the **Expected Success Traits** column, insert the success traits identified for a fully competent employee in the position. These should be specific and measurable.

Refer to the *JE-ALL-3510-R. List of Competencies* document as a reference and starting point; however, don't just copy and paste the examples.

## When Candidate is Hired

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Complete the remaining fields in the **Overview** section.

## When Probationary Period is Over

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Complete the rest of the form:

1. Complete the **Status** column: Assign a status to for each expected accomplishment and success trait – either ‘Meets Expectations’ or ‘Development Required’.
2. Complete the **Comments** column: Add comments re the status assigned where appropriate. This is especially important for items for which the status is ‘Development Required’.
3. Complete the **Acknowledgment** section: Enter any overall comments and sign and date the completed form.
4. Once you've reviewed the completed form with the employee, have them sign and date it. If they wish to attach comments, indicate that comments are attached in the field provided and attach them as a separate page. All comments pages must be signed and dated by the employee.

## Tips

- ♦ Include the expectations stipulated in the *Probationary Period Review Form* in the employment agreement, to clearly establish criteria in case you need to defend an extension to the probationary period, or termination.
- ♦ When opening a position, create interview questions based on the success traits and accomplishments/goals expected by the end of the probationary period.
- ♦ Think back to previous people who have held the position, either within the Company or elsewhere:
  - What attributes made them a superstar?
  - What attributes were lacking for ultimate success in the job? What should be avoided?