

Probation Performance Review Policy Template

1. Purpose and Scope

This policy establishes a structured framework for evaluating employee performance during the probationary period. It applies to all new hires, internally promoted employees, and rehired employees subject to probationary terms.

2. Policy Statement

All employees in probationary status will undergo formal performance reviews to assess their suitability for continued employment and to provide feedback supporting their development and integration into the organization.

3. Probationary Period Duration

Standard probationary period: 90 calendar days from the start date

Extended probationary period: Up to 180 days at management discretion

Specialized roles: May have modified periods as specified in the employment contract

4. Review Schedule

4.1 Formal Review Points

30-Day Review: Initial assessment of adaptation and basic job competency

60-Day Review: Mid-point evaluation of progress and skill development

90-Day Review: Final probationary assessment and employment decision

4.2 Continuous Feedback

Managers should provide informal feedback weekly during the first month and bi-weekly thereafter.

5. Performance Criteria

Employees will be evaluated on:

Job Knowledge: Understanding of role responsibilities and technical requirements

Quality of Work: Accuracy, thoroughness, and attention to detail

Productivity: Meeting deadlines and output expectations

Communication: Effectiveness in written and verbal interactions

Teamwork: Collaboration and professional relationships

Dependability: Attendance, punctuality, and reliability

Adaptability: Flexibility and response to feedback

Cultural Fit: Alignment with organizational values and work environment

6. Review Process

6.1 Preparation

Manager completes the performance review form 3 business days before the scheduled meeting

Manager gathers specific examples and documentation of performance

Employee completes self-assessment (optional but encouraged)

6.2 Review Meeting

Private, uninterrupted meeting between manager and employee

Discussion of strengths, areas for improvement, and progress

Opportunity for employee questions and concerns

Collaborative goal-setting for the next review period

6.3 Documentation

Completed review form signed by both manager and employee

Copy provided to employee within 2 business days

Original forwarded to Human Resources for personnel file

7. Review Outcomes

7.1 Satisfactory Performance

Employee continues in probationary status until final review

At 90-day review: Employee successfully completes probation and becomes a regular employee

7.2 Needs Improvement

Specific performance concerns documented with examples

Performance Improvement Plan (PIP) may be implemented

Additional support, training, or resources provided

Follow-up review scheduled (typically 2-4 weeks)

7.3 Unsatisfactory Performance

Employment may be terminated during probationary period

Probationary period may be extended with clear improvement expectations

Decision documented with specific performance deficiencies noted

8. Extension of Probationary Period

If performance is inconsistent or additional evaluation time is needed:

Extension may be granted for up to 90 additional days

Reason for extension must be documented in writing

Clear performance objectives set for the extended period

Final review conducted at end of extended period

9. Termination During Probation

Employment may be terminated at any time during probation

No specific cause required, though documentation of performance issues is recommended

Final paycheck and benefits termination handled per company policy

Exit interview may be conducted at HR discretion

10. Employee Rights and Responsibilities

10.1 Employee Rights

Receive clear performance expectations at start of employment

Access to regular feedback and formal reviews

Opportunity to provide input and self-assessment

Receive copy of all performance documentation

10.2 Employee Responsibilities

Actively seek feedback and clarification

Demonstrate effort to meet performance standards

Participate honestly in review discussions

Sign review documents (signature indicates receipt, not necessarily agreement)

11. Manager Responsibilities

Provide clear job expectations and performance standards from day one

Offer adequate training, resources, and support

Document performance consistently and objectively

Conduct timely reviews and provide constructive feedback

Make fair employment decisions based on documented performance

Forward all review documentation to HR within 5 business days

12. Human Resources Responsibilities

Ensure managers understand and follow the review process

Provide review templates and guidance

Monitor completion of scheduled reviews

Maintain confidential personnel records

Advise on performance issues and termination decisions

Ensure consistency in application of policy across departments

13. Confidentiality

All performance review information is confidential and accessible only to:

The employee

The employee's direct manager and department head

Human Resources personnel

Senior leadership as necessary for employment decisions

14. Appeals Process

If an employee believes their probationary review was conducted unfairly:

Employee may submit written concerns to HR within 5 business days of review

HR will review the matter and may meet with relevant parties

Final employment decision remains at management discretion during probation

15. Policy Review

This policy will be reviewed annually and updated as needed to reflect best practices and legal requirements.

Effective Date: [Insert Date]

Policy Owner: Human Resources Department

Approved By: [Name, Title]

Next Review Date: [Insert Date]RetryClaude can make mistakes. Please double-check responses.

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