[Company Name / Logo]

Probation Period Appraisal Form

Employee Details

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| --- | --- |
| Employee name |  |
| Job title |  |
| Employee start date |  |
| Date of probationary review | ☐ 3-month review Due date: \_ \_ / \_ \_ / \_ \_ \_ \_  ☐ 6-month review Due date: \_ \_ / \_ \_ / \_ \_ \_ \_ |

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| --- | --- |
| Line manager name |  |

Guidance to Rating

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| **Rating** | **Description** |
| **Of the highest quality** | The employee has demonstrated that their performance is of the highest quality, and surpasses expectations. Examples would include excellent client feedback and a high dedication to the performance of their duties.  It is unlikely that many employees will fall into this category. |
| **Above expectations** | The employee is performing at a level higher than expected. This can be demonstrated through learning and understanding processes and service delivery quickly as well as from client feedback.  It is likely that only a few employees will fall into this category. |
| **Meets expectations** | The employee is performing at the level expected. This means that they have not demonstrated surpassing your expectations, but they are also not performing below them. They perform all that is required of them.  It is likely that most employees will fall into this category. |
| **Less than expected** | The employee is performing at a level below expectations. This would typically mean that they are struggling within their role, and their performance may have been commented on by clients.  It is hoped that not many employees will fall into this category. However, if they do, the Company should explore the reasoning for this and establish a corrective course of action. |
| **Needs improvement** | The employee is performing significantly below expectations and requires immediate improvement. Typical examples would include effort being made to perform their duties or understand the role.  It is hoped that not many employees will fall into this category. However, if they do, the Company should explore the reasoning for this and establish a corrective course of action. |

1. Job Knowledge

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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2. Quality of Work

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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3. Performance Against Objectives

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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4. Problem Solving

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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5. Decision Making

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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6. Communications

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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7. Planning of Work

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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8. Management of Time

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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9. Housekeeping

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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10. Team Working

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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11. Self-Responsibility

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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12. Attendance and Timekeeping

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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13. Leadership Qualities

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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14. Adherence to Policies and Procedures

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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15. Ability to Work Under Pressure

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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Overall Rating and Summary of Performance

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| **Rating** |
| ☐ Of the highest quality  ☐ Above expectations  ☐ Meets expectations  ☐ Less than expected\*  ☐ Needs improvement\*  \* Please provide details of how this is being addressed in the line management comments section. |

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| **Line management comments/examples** |
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| --- |
| **Summary of areas for improvement** |
| 1.  2.  3.  4.  5. |
| **Details of training/support to be provided by line manager, including timescales** |
| 1. Date: \_ \_ / \_ \_ / \_ \_ \_ \_  2. Date: \_ \_ / \_ \_ / \_ \_ \_ \_  3. Date: \_ \_ / \_ \_ / \_ \_ \_ \_  4. Date: \_ \_ / \_ \_ / \_ \_ \_ \_  5. Date: \_ \_ / \_ \_ / \_ \_ \_ \_ |

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| **Employee comments** |

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| --- | --- |
| Employee’s name |  |
| Signature |  |
| Date | \_ \_ / \_ \_ / \_ \_ \_ \_ |

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| **Line management comments**  Please indicate the review period  ☐ 3-month review\* ☐ 6-month review  \* If this is the 3-month review the probation period will not be passed until the 6-month review.  \* If the employee is performing at less than expected or below, please ensure that you discuss this with your HR Consultant so that corrective action can be put in place.  ☐ Probation period passed ☐ Probation period extended ☐ Probation period failed\*  \*If the employee has failed their 6-month probation period, please provide full details including why you do not believe that the employee will improve their performance. |

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| Line manager’s name |  |
| Signature |  |
| Date | Date: \_ \_ / \_ \_ / \_ \_ \_ \_ |

Please return this form to [Insert name] for filing on the employee’s personnel file.