# HERIOT WATT UNIVERSITY

# Probation Review Form

# SECTION 1:

Before completing this form please read the **University’s Probation Policy and Procedure**

<https://www.hw.ac.uk/uk/services/docs/hr/policies/Probation_Policy.pdf>

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| --- | --- |
| **Title and full name** |  |
| **Job Title**  |  |
| **School/Service**  |  |
| **Line Manager** |  |
| **Date of appointment** |  |

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| --- | --- | --- | --- | --- | --- |
| **Date of 1st review meeting**  | Tick once completed | **Date of 2nd review meeting**  | Tick once completed  | **Date of Final Review meeting**  | Tick once completed  |
|  |  |  |  |  |  |

**Please note that this form should be completed by both the employee and their manager. Employees should use this form to prepare for their probationary review meetings and should update the relevant sections of the form accordingly and use it as the basis of their discussion. The form should be kept up to date at all times as an accurate reflection of their progress during probation.**

## SECTION 2:

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| **The employees manager should add details of the objectives within 2 weeks of them commencing employment:** |
| **Work Performance Objectives** | **1st review meeting (6 weeks after commencing employment)** | **2nd Review meeting (12 week point after commencing employment)** | **Final Review meeting** **(1/2 weeks before 6 month point)** |
| Objective 1 (manager to add details) | Objective Met/Partly Met/Not Met (delete as appropriate)Add comments | Objective Met/Partly Met/Not Met (delete as appropriate)Add comments | Objective Met/Partly Met/Not Met (delete as appropriate)Add comments |
| Objective 2 (manager to add details)  | Objective Met/Partly Met/Not Met (delete as appropriateAdd comments | Objective Met/Partly Met/Not Met (delete as appropriateAdd comments | Objective Met/Partly Met/Not Met (delete as appropriateAdd comments |
| Objective 3 (manager to add details)  | Objective Met/Partly Met/Not Met (delete as appropriate)Add comments | Objective Met/Partly Met/Not Met (delete as appropriate)Add comments | Objective Met/Partly Met/Not Met (delete as appropriate)Add comments |
| Conduct/ Behaviour | Satisfactory/Not Satisfactory Add details  | Satisfactory/Not SatisfactoryAdd details  | Satisfactory/Not SatisfactoryAdd details  |
| Attendance and Timekeeping | Satisfactory/Not SatisfactoryAdd details  | Satisfactory/Not SatisfactoryAdd details | Satisfactory/Not SatisfactoryAdd details  |

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| **If any of the above areas require improvement please provide details in the next section, examples may include where improvements are required and timescales for improving, any additional review meetings that have been agreed. This section of the form should be updated to reflect improvements in performance, conduct and attendance and any further measures put in place. Equally if there has been no improvement, this should be noted and how this is being monitored, action required etc.**  |
| 1st review meeting:2nd review meeting: Final review meeting: |
| **Have the learning and development needs identified for this period of the probation been addressed?** | **YES****NO** | Please add details of all learning and development undertaken (this should include completed and partially completed training)  | If no, please explain why not: |
| **Has the employee successfully completed their probationary period: YES/NO** **(if YES please sign below, if NO please complete Part 3 on the following page)** |
| **Employee’s Signature:****Manager’s Signature:****Date:** |  |

## SECTION 3:

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| Please provide reasons why the employee has not successfully completed their probation period and summarise what action has been taken to address any difficulties which have arisen during probation.  |
| **Should the employee’s probationary period be extended?** | **YES NO**  |
| If **NO**, please confirm course of action: i.e. employment end date and final date for appeal: If **YES**, please provide reasons and, where appropriate, specify any areas of improvement required and how these will be monitored.  |
| Length of extension (up to 3 months): | New Probation Period completion date: |
| Employees comments:  |
| **Employee’s Signature:****Manager’s Signature:****Date:** |
| **Extended Probationary period**  |  |
| Has the employee’s progress been satisfactory during the extended probationary period? YES/NO If YES, please sign below, if NO, please confirm course of action i.e. employment end date and final date for appeal:  |
| **Employee’s Signature:****Manager’s Signature:****Date:** |

## Guidance on Objective Setting

Guidance on Objective Setting can be found on the HR webpages by clicking on this link: <https://heriotwatt.sharepoint.com/sites/hr-yourcareeranddevelopment/SitePages/New-to-PDR-.aspx>

**Performance Objectives:**

These objectives are designed tomeasure the standard of work produced by the individual. Indicators of good quality work may include a high level of accuracy, well-constructed and formatted, concise and compliant with legislative and policy requirements. It also measures efficiency i.e. how well an individual manages their time, whether deadlines are met and the timescale within which work is produced. Other measures may include accountability, people management, team working, communication and leadership depending on the key priorities within the role. Objectives should also be reflective of the University’s Values.

**Conduct/Behaviour**

This measure’s if conduct and behaviour during the probation period has been satisfactory and in compliance with the university code of conduct

**Attendance and Time-keeping**

This measure’s an individual’s physical presence at work, punctuality and their compliance with the relevant University policies such as sickness absence reporting.