



UK EMPLOYERS • CHECKED 6 OCTOBER 2026

Probation review template

A manager's record of the check-ins and the outcome, on one page. **Start it in week one.**

WHO AND WHEN

Name	Role	Manager
Start date	Probation ends	Decide before

Decide before: the day they reach five months and three weeks' service. Count the days, because it is close.

WEEK ONE: WHAT GOOD LOOKS LIKE AT MONTH THREE

Three or four plain sentences, agreed together

How we'll check in (how often, and how)	First check-in
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CHECK-INS: YOURS TO RUN (carry on overleaf when these run out)

In the room: what's going well, what isn't yet, the help you'll give and their view.

After: write it up that day, as if they will read it. They can ask to see it.

Check-in 1, date	What's going well
What isn't yet, and the help agreed	What they said
Check-in 2, date	What's going well
What isn't yet, and the help agreed	What they said
Check-in 3, date	What's going well
What isn't yet, and the help agreed	What they said

A concern? Raise it at the time, not at the outcome meeting: an example, the support you'll give and the date you'll look again.

THE OUTCOME MEETING, BEFORE PROBATION ENDS

☐ Passed	☐ Extended to	☐ Ended on
The reasons for the decision	Confirmed in writing on	
Your feedback to them	Their feedback to you	

Feedback goes both ways, whether they pass or you extend: what they've done well and what's next, then what helped them and what didn't.

FOR THE MANAGER

Before you decide

THE DATES

- ☐ Outcome meeting booked, for month five or sooner
- ☐ Everything done before the "decide before" date

IF IT'S ENDING

- ☐ Nothing to do with pregnancy, health, a complaint or a legal right they asked for. Unsure? Get advice first
 - ☐ No surprise: they've heard the concerns and had a chance to respond
 - ☐ A colleague or union rep with them, if they ask to bring one
 - ☐ Notice: what the contract says, and at least a week after a month's service
 - ☐ Decision, reasons and notice in writing
- #### IF THEY PASS
- ☐ Told in writing. It is the step most often forgotten

If you extend

Only if the contract allows it or they agree. Confirm it in writing before the original end date, with the new end date, what needs to improve and the support you'll give. Still decide before the date on this form.

Send us your what-ifs.

Rather not carry the review dates yourself? **Retained HR Partner** clients hand them to us.

The detail is in [our probation guide](https://whatifhr.co.uk/blog) at whatifhr.co.uk/blog.