

Probationary Period – Review Meetings

This form is intended to support managers and employees in line with the Managing Probation policy. The form should be used to both guide and record a series of review meetings during employees' probationary period as summarised in the table below. Full details on the process can be found in the Managing Probation policy.

Employee Name:	
Job Title:	
Department:	
Manager Name:	
Date of Appointment:	

Meeting Tracker	Typical Timescale	Date Due*	Tick once completed
Induction Meeting	<i>1 week</i>		
First Review Meeting	<i>4 weeks</i>		
Second Review Meeting	<i>8 weeks</i>		
Final Review Meeting	<i>Before the 12 weeks end date</i>		

** Dates for future meetings should be set at the initial induction meeting. Managers should familiarise themselves with CRGP procedures in relation to managing probationary periods, detailed in Employee Handbook.*

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Induction Meeting

An initial Induction Meeting should take place within the first week of an employee joining Coventry & Rugby GP Alliance. This supports the normal induction process and the setting of objectives or performance standards ensures that new employees are fully aware of the expectation of them in their new roles. This meeting also provides an early opportunity to identify any training or developmental needs (as well as noting any mandatory training requirements) or to discuss any support the employee may require within their new role. The Induction Checklist should also be read and actioned alongside any local induction programme at this time/during the early weeks.

1. Objectives

2. Managers should identify objectives or performance standards for the employee to achieve during their probation period. These should be linked to the relevant job description and will be assessed at the later review meetings (as noted in the next part of the form).

3. Objectives/standards to be met during the probation period:

4.

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Training/Support Required

Managers and employees should identify any relevant training or support requirements needed to achieve the above objectives.

Identified
training/support
requirements:

Employee Signature:		Date:	
Manager Signature:		Date:	
Forms at this stage should be retained locally by the relevant manager			

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First Review Meeting

A first review meeting should take place (typically around the 4-week point) to allow for a structured 'check-in' discussion in order to ensure that the employee is settling into their new role, to provide the opportunity for any concerns or problems to be raised and to provide early feedback on performance so far.

Performance

Manager Feedback:
(this should refer back to the objectives set at the initial Induction Meeting as well as provide an overall summary on performance so far)

Employee
Comments:

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Improvement Required <i>(If applicable)</i>	
Summary of improvement required: <i>(Note specific/measurable actions including timescales)</i> <i>*Concerns about failure to reach required standards should be raised with HR at an early stage</i>	

Training Progress	
Mandatory Training Complete?	Yes / No <i>(If Yes, ensure this is recorded on the front of this form)</i>
Summary of other training progress/effectiveness of support provided:	

Employee Signature:		Date:	
Manager Signature:		Date:	
Forms at this stage should be retained locally by the relevant manager			

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Second Review Meeting

A second review meeting should take place (typically around 8-week point) in order to review the employee's performance in relation to any objectives/improvement targets set earlier in the process. It is also a further opportunity to discuss any concerns or problems which may have arisen and to reflect on any training, development or support requirements, including reviewing the effectiveness of any supports which have already been put in place.

Performance

Overall Summary:
(this should refer back to the objectives set at the initial Induction Meeting, or any improvement objectives set at the first review meeting, as well as provide an overall summary on performance so far)

Employee
Comments:

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Improvement Required <i>(If applicable)</i>	
Summary of improvement required: <i>(Note specific/measurable actions required before the probation end date)</i> <i>*Concerns about failure to reach required standards should be raised with HR at an early stage</i>	

Training Progress	
Mandatory Training Complete?	Yes / No <i>(If yes, ensure this is recorded on the front of this form)</i>
Summary of other training progress/effectiveness of support provided:	

Employee Signature:		Date:	
Manager Signature:		Date:	
Forms at this stage should be retained locally by the relevant manager			

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Final Review Meeting

The final review meeting should be held in 12 weeks (in advance of the probation end date). Whether or not the employee's performance has been satisfactory over the probationary period will determine how this meeting should be held and managers should refer to the Managing Probation policy ahead of holding this meeting.

Current Performance

This section should be used to record discussion on the key areas of the job, and include a summary of achievement against the objectives that have been previously agreed.

Objective / Competence 1:

Objective / Competence 2:

Objective / Competence 3:

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Objective / Competence 4:

Objective / Competence 5:

Development Summary

This section should be used to record any areas of the employee's work where further training, support or development would be beneficial.

Development and Training

This section should list specific requirements for any training or development (not restricted to training courses, and may include projects, coaching, planned experience or any other suitable activity that will enhance the skills, knowledge and behaviour required).

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Career Planning

This section should record any areas of the department or Company in which the employee has expressed a specific interest.

Overall Conduct

This section is to be completed by the Line Manager in discussion with the employee

	Improvement Required	Satisfactory	Good	Excellent
Quality and accuracy of work				
Efficiency				
Attendance				
Time Keeping				
Work relationships (teamwork and interpersonal communication skills)				

Other areas of discussion

This section should record any other points raised at the meeting.

Summarise the employee's performance and progress over the period

COVENTRY
& RUGBY
GP ALLIANCE

This form should be completed in conjunction with CRGPA's procedures for Managing Probationary Period, detailed in Employee Handbook.

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Length of the extension (max 3 months):
New Probation Period completion date:

Probation Confirmation			
<i>I confirm that _____ has demonstrated a satisfactory level of performance throughout the probationary period and has completed the relevant mandatory training. On this basis, I can confirm that the probationary period has been successfully completed and that this should now be formally confirmed.</i>			
Employee Signature:		Date:	
Manager Signature:		Date:	
Completed forms should be copied to the relevant local HR Team as soon as possible after signing off			
Please note: Following the Probation Review Meeting the line manager should confirm verbally whether or not the employee has successfully completed their probationary period. HR will only issue a letter to confirm the outcome of the probationary period.			