

CHECKLIST

Probationary Period

Procedure	Yes/N/A
1. Decide how long is an appropriate probation period for the business	
2. Decide how probation period will end e.g. will employee be informed in writing that they have successfully passed the probation period?	
3. Decide how performance during the probation period will be assessed and ensure the criteria are set down and performance is recorded against those criteria	
4. Probationary period including any extensions should be no longer than 1 year (3-6 months is standard)	
5. Ensure clause on probation is included in contract of employment and employee is aware of the requirement for probation	
6. Clause in contract should include the right to extend the probationary period – total probation period should not exceed 12 months (relevant threshold for unfair dismissal)	
7. Clause in contract should state that full disciplinary procedure will not apply to probation period	
8. Clause in contract should also provide for termination during the probation period to avoid it being considered a fixed term period	
9. Depending on normal company notice periods, the contract may need to provide for shorter notice period during probation period	
10. Decide performance review dates to review an employee's performance during the probation period, to discuss any improvements required and suitability for the role	
11. Schedule performance review dates throughout probation period	
12. Record notes on any meeting with employee on performance/conduct	
13. Set a diary reminder for at least 2 weeks before the probation period is due to expire to assess suitability and decide: a) if employment is to end b) if probation period is to be extended c) if employment is to be confirmed	
14. If probationary period is to be extended this should only be to allow employee opportunity to improve and further review dates and meetings should be scheduled during the extension period	

<p>15. Employee should be advised in writing of:</p> <ul style="list-style-type: none"> a) the need for the extension b) the improvements that are required c) the scheduled review dates and meetings to check in on performance 	
<p>16. Ensure employee has all training and information necessary to bring them to the required standard during the probation period</p>	
<p>17. If termination of the employment relationship becomes necessary the employee should be invited (in writing) to a disciplinary meeting to discuss poor performance/conduct and advised that dismissal could result.</p>	
<p>18. The employee must be given an opportunity to make representations about the matters at the hearing and a decision should not be made until the employer has had an opportunity to consider the matters raised by the employee</p>	
<p>19. The decision and reasons to terminate the employment should be communicated to the employee in writing</p>	
<p>20. The notice period required to be provided to the employee should be monitored to ensure it does not take the employee's service over the 12-month threshold – date of dismissal is the date the notice period ends</p>	