

Probation Review Form

Checklist · UK · Published 2026-09-08 · Square brackets are placeholders to replace with your own details.

A probation review form is the record a manager completes at each probation review meeting — the objectives and standards the employee was set, the evidence actually seen against each one, whether each is met, partly met or not met, the actions agreed, the employee's own comments, and the decision at the end: continue, confirm, extend, or do not confirm.

It is the document that decides how a probation ends. Acas guidance says employers should make sure employees have regular structured probation reviews, that managers should keep records of probation reviews and share them with the employee after each review meeting, and that the outcome of probation should not come as a surprise to the employee. Without a written record at each review, the final meeting turns into one person's recollection against another's, and the honest options narrow to confirming someone who is not ready or dismissing someone who was never told.

This template gives you the whole form: the header, a review table with worked examples and blank rows for the objectives, the conduct and attendance checks, the employee's comments and support requests, the decision block with its reasoning field and next review date, both signatures, and guidance on the mid-point review, on timing, and on which letter follows each decision.

How to use this form

This form records one probation review meeting for one employee at [Your company]. Use it at every review point — the early check-in and the mid-point review as well as the final one — and give the employee a copy after each meeting.

Complete the header and the objectives column before the meeting, working from the previous review form, the induction plan or the written statement of employment particulars. Take the meeting from the form rather than writing it up afterwards, and complete the decision block with the employee still in the room. Acas says the outcome of probation should not come as a surprise to the employee; that only holds if they hear it from you at the time.

The form records the review. The outcome is confirmed separately by letter — a probation completion letter, an extension letter or a termination letter, depending on the decision.

Header: review details

- Employee: [name] — [job title] — [department or site] — start date [date].
- Manager conducting the review: [name] — [job title].
- Others present: [name] — [role, e.g. HR, second manager, note-taker].
- Probation period as stated in the written statement of particulars or contract: [length], ending [date].
- Review point: [week 4 check-in / mid-point review / final review / extension review] — review [n] of [n].
- Date and location of this review: [date] — [location].

- Date of the previous review: [date]. Actions outstanding from it: [list, or "none"].
- Absence, leave, or change of role during the period being reviewed: [details] — take this into account when judging what the evidence can fairly show.
- Adjustments in place for a disabled employee: [details, or "none requested"].

Objectives and standards reviewed

This table is the document. One row per objective or standard the employee was set — taken from the job description, the written statement of employment particulars, the induction plan or the previous review form. Add rows rather than merging objectives together: a row that covers three things cannot be rated.

Write the evidence column before the rating column, and put dated facts in it rather than impressions. "Two errors on [date], both corrected at the time" can be reviewed by someone else; "attitude is fine" cannot, and neither can be relied on at the end of probation.

Objectives and standards — the first rows are worked examples; the blank rows below are for you to complete.

Objective or standard	Evidence seen	Met / Partly met / Not met	Action agreed
[Objective 1 — e.g. complete all [system] induction modules by week 4]	[Modules 1 to 4 completed [date]; module 5 outstanding]	Partly met	[Complete module 5 by [date]; manager to book cover]
[Standard — e.g. work to the [task] procedure without supervision]	[Observed on [dates]; two errors on [date], both corrected at the time]	Partly met	[Shadow [name] for two shifts; re-check at the next review]
[Objective — e.g. handle [n] [cases or covers or orders] a week to the standard in [document]]	[n] per week in weeks [x] to [y]; quality sample on [date] scored [result]	Met	None
[Standard — attendance and timekeeping as set out in the [absence policy]]	[n] days absence, all notified in line with the policy; no lateness recorded	Met	None

Conduct, attendance and working relationships

- Attendance and timekeeping against the standard in the [absence policy]: [days absent, number of occasions, whether properly notified].
- Conduct and compliance with the code of conduct and site rules: [any concerns raised, with dates].
- Mandatory training completed: [e.g. health and safety induction, fire, food safety, data protection]. Outstanding: [list, with dates to complete].
- Working relationships with colleagues, customers and other teams: [record with examples rather than adjectives].

- Any concern raised here for the first time: [details]. A concern the employee has never heard before should not carry weight in a final decision until they have had a fair chance to respond to it.

Employee comments and support

- The employee's own view of their progress: [record it in the employee's words].
- What is getting in the way: [equipment, training, workload, shift pattern, unclear instructions, anything else].
- Support, training or adjustments requested: [details]. Response: [agreed, with dates] or [declined, with the reason].
- Wellbeing check — how the employee is finding the role: [record]. Acas guidance says probation reviews should cover the employee's wellbeing and how they are feeling in their role, not only their output.
- Anything the employee wants recorded that the manager does not accept: [record it anyway, marked clearly as the employee's account].

Decision at this review

- Decision: [continue probation to the next review] / [confirm employment] / [extend probation] / [do not confirm employment].
- Reasoning and the evidence relied on: [set this out in enough detail that a manager who was not present could follow how you got there].
- If continuing: objectives for the next period — [objective 1], [objective 2], [objective 3]. Support to be provided: [details].
- If extending: new end date [date]; reason [details]; what must be demonstrated by then [details]. Confirm the extension in writing before the original end date — Acas says failing to do so could be a breach of contract.
- Before deciding not to confirm, check length of service against the current unfair dismissal position — Acas states that from 1 January 2027 protection from unfair dismissal becomes a right after 6 months in the job, including for anyone already holding 6 months' service on that date.
- If not confirming: notice to be given is [the contractual notice period] or [the statutory minimum], whichever applies — [state the period]. Confirm the decision and the reasons in writing.
- Date of the next review: [date] — set it before the probation end date, never on it.
- Manager: [name] — [signature] — [date]. Employee: [signature] — [date]; signing confirms the employee has seen this form, not that they agree with it.
- Copy given to the employee on [date]. Filed at [system or location].

The mid-point review most employers skip

The mid-point review is the one that decides the outcome, and it is the one that gets moved. By the final review there is no time left to act on anything: an objective set at that meeting cannot be demonstrated in

the week before the end date, so a manager who has met the employee once ends up choosing between confirming someone who is not ready and dismissing someone who was never properly told.

Acas guidance says employers should make sure employees have regular structured probation reviews, that regular reviews help check progress and identify whether the employee needs extra support, and that the outcome of probation should not come as a surprise to the employee. A mid-point review with a written record is what makes that last sentence true rather than aspirational.

Book every review at the start of the probation period — in the calendar, with the room and the cover arranged. A review that depends on somebody remembering to arrange it is a review that will not happen in a busy month, and busy months are exactly when new starters struggle.

Timing: why a late decision is weak

Set the final review comfortably before the probation end date — a fortnight is usually enough — so that there is time to act on whatever it concludes. Acas says an extension must be confirmed in writing before the original probation period ends and that failing to do so could be a breach of contract; a decision taken the day after the end date has nothing left to extend.

If probation simply lapses, the employment continues — probation ending does not end the job. Whether any shorter probationary notice period or other probationary condition still applies after that date depends on how it is worded in the contract or written statement, so check the wording rather than assuming either way. It is not a disaster; it is just a decision made by accident.

Where the decision is not to confirm, Acas says the employer should follow a fair procedure, give the reasons in writing and give the correct notice — the statutory minimum or the contractual period. Deciding late compresses all of that into an argument about dates that you will lose.

Which letter follows the decision

- Confirmed: send a probation completion letter. Acas says that when an employee successfully completes probation the employer should confirm it in writing, for example in a letter or email, and confirmation often changes particulars such as the notice period.
- Extended: send a probation extension letter before the original end date, stating the new end date, the reason, what must be demonstrated and the support provided.
- Not confirmed: send a probation termination letter setting out the reasons and the notice, having followed a fair procedure first.
- Continuing to the next review: no letter is needed, but send the completed form itself — Acas says review records should be shared with the employee after each review meeting.
- Whatever the outcome, tell payroll and [HR system] on the same day if anything switches on or off at confirmation, so nothing changes at the wrong date.

Records, data protection and review of this form

- Give the employee a copy after every review: Acas guidance says managers should keep records of probation reviews and share them with the employee after each review meeting.

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- File completed forms on the personnel file at [system or location], alongside the induction plan, the written statement of employment particulars and any probation letters.
- Completed forms are personal data. GOV.UK states that personal data must be kept for no longer than is necessary, so set the retention period in your data retention policy rather than keeping review forms indefinitely.
- Check that the objectives on the form match the conditions in the written statement of employment particulars — section 1 of the Employment Rights Act 1996 requires the statement to include any probationary period, including any conditions and its duration.
- Owner of this form: [name or role]. Last reviewed: [date]. Next review: [date].

How to use this template

1. Copy the objectives from the job description, induction plan or previous review form into the table before the meeting — never write them for the first time in front of the employee.
2. Fill the evidence column with dated facts you have actually seen, and leave the rating blank until the evidence is written down.
3. Complete the decision block during the meeting so the employee hears the outcome from you rather than reading it days later.
4. Book the next review before the employee leaves the room, and set the final review comfortably before the probation end date.
5. Send the completed form to the employee after every review and file a copy on the personnel file.
6. Follow the decision with the matching letter — completion, extension or termination — and send any extension letter before the original end date.

Official guidance

- › [Acas — Probation periods](#)
- › [Acas — Probation periods: reviews](#)
- › [Acas — Probation periods: following a fair process](#)
- › [Legislation.gov.uk — Employment Rights Act 1996, section 1 \(written statement of particulars\)](#)

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