



Probationary Period Review Checklist Template 2026

Pre-Review Preparation

Steps to gather necessary documentation, performance data, and feedback from supervisors before the meeting.

Review Meeting Date

Employee Name

Reviewer/Manager Name

Initial Job Description & KPIs

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Documents to Review

- ☐ Training Logs
- ☐ Attendance Records
- ☐ Peer Feedback
- ☐ Previous 1:1 Notes

Pre-Review Summary Notes

Write something...

Performance Metric Evaluation

Assessing the employee's progress against initial KPIs, job responsibilities, and specific 90-day objectives.

Overall KPI Achievement Status

- ☐ Exceeded Expectations
- ☐ Met Expectations
- ☐ Below Expectations
- ☐ Needs Immediate Improvement

Percentage of Objectives Completed

Enter a number...

Detailed Analysis of Metric Deviations

Write something...

Core Competencies Successfully Demonstrated

- ☐ Quality of Work
- ☐ Task Completion Speed
- ☐ Accuracy and Attention to Detail
- ☐ Adherence to Deadlines
- ☐ Problem-Solving Capability

Supporting Performance Evidence

 Upload File

Competency & Skill Assessment

Reviewing technical proficiency, soft skills, and the employee's ability to adapt to company tools and workflows.

Technical Proficiency Rating

- ☐ Exceeds Expectations
- ☐ Meets Expectations
- ☐ Needs Improvement
- ☐ Unsatisfactory

Core Competencies Demonstrated

- ☐ Communication Skills
- ☐ Problem Solving
- ☐ Time Management
- ☐ Team Collaboration
- ☐ Attention to Detail
- ☐ Adaptability

Detailed Assessment of Skill Gaps

Write something...

Supporting Evidence or Work Samples

 Upload File

Manager Confirmation of Competency Review

Cultural Fit & Integration

Evaluating how well the employee has integrated into the team dynamics, company values, and workplace culture.

Observed Core Value Alignment

- ☐ Integrity
- ☐ Collaboration
- ☐ Innovation
- ☐ Customer Obsession
- ☐ Accountability

Team Integration Level

- ☐ Fully Integrated
- ☐ Developing
- ☐ Needs Support
- ☐ At Risk

Observations on Team Collaboration

Write something...

Specific Instances of Cultural Alignment

Write something...

Manager Confirmation of Integration Review

Training & Resource Gap Analysis

Identifying any additional training, mentorship, or tools required to ensure the employee's long-term success.

Identified Training Needs

- ☐ Technical Software Training
- ☐ Compliance & Regulatory Training
- ☐ Soft Skills & Leadership Development
- ☐ Product/Service Knowledge
- ☐ Internal Process & Workflow Training

Missing Resources/Tools

Write something...

Detailed Gap Analysis Summary

Write something...

Target Completion Date for Training

Enter date...

Training Priority Level

- ☐ Critical
- ☐ High
- ☐ Medium
- ☐ Low

Training Plan or Syllabus Attachment

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Feedback & Two-Way Communication

Facilitating a structured dialogue for the employee to share their experience and for the manager to provide constructive coaching.

Manager's Constructive Feedback

Write something...

Employee Self-Reflection

Write something...

Areas of Excellence

- ☐ Technical Skills
- ☐ Communication
- ☐ Team Collaboration
- ☐ Problem Solving
- ☐ Punctuality & Reliability

Overall Communication Satisfaction

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Unsatisfied

Manager's Acknowledgment

Employee's Acknowledgment

Probationary Outcome Determination

Formalizing the decision to confirm permanent employment, extend the probationary period, or terminate the contract.

Probationary Outcome

- ☐ Pass - Confirm Permanent Employment
- ☐ Extend Probationary Period
- ☐ Terminate Employment

Effective Date of Decision

Enter date...

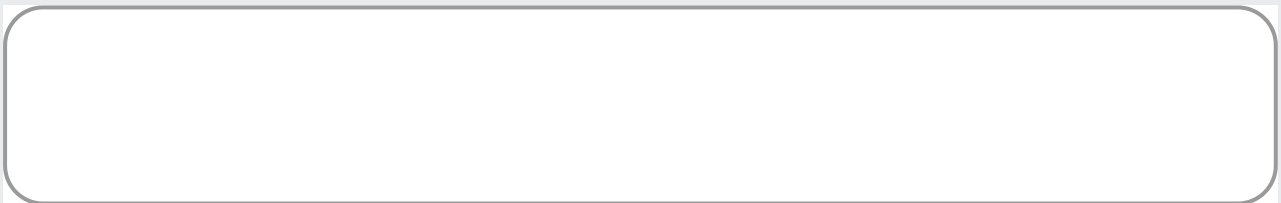
Justification and Detailed Feedback

Write something...

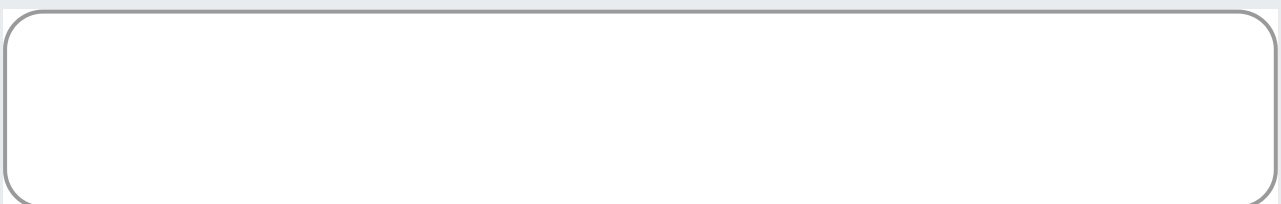
New Probation End Date (if extension applied)

Enter date...

Manager Signature

A large, empty rectangular box with rounded corners, intended for a signature.

Employee Acknowledgment Signature

A large, empty rectangular box with rounded corners, intended for a signature.

Post-Review Documentation & Follow-up

Updating HRIS records, notifying payroll/benefits departments, and scheduling the next performance milestone.

Date of Review Completion

Enter date...

Final Probation Outcome

- ☐ Passed Probation
- ☐ Extended Probation
- ☐ Unsuccessful/Termination

Summary of Final Decision & Comments

Write something...

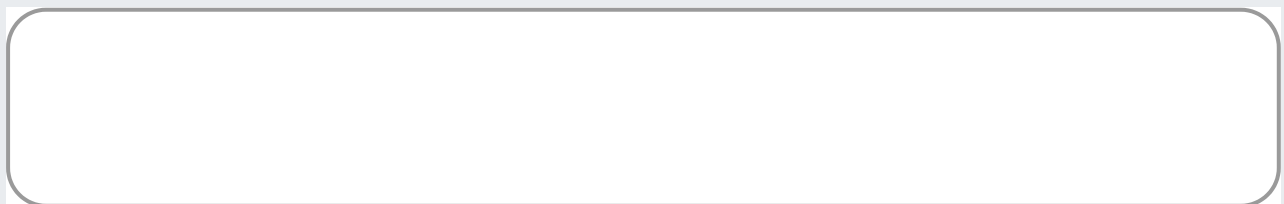
Signed Review Document

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Manager Signature



Employee Signature



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✔ Finish

🔧 Generate Sample Report