MSS
The HR People

Managing A Probation Period

A Manager's Guide and Checklist



Managing Probation

MSS The HR People

A probation period provides an opportunity for both the employer and employee to assess whether the role is a suitable fit. It allows the manager to review performance, conduct, attendance and overall suitability for the position, while giving the employee clear expectations, feedback and support to succeed.

Probation should be managed as a structured and supportive process, rather than waiting until the end of the period to identify concerns. Regular reviews, clear communication and accurate documentation are essential to ensuring consistency and fairness.

This toolkit provides a practical guide to managing probation, from setting expectations at the outset to conducting formal reviews and confirming the outcome.

Key principles to remember:

- Ensure a probation clause is included in the contract, with the possibility for extending
- Set clear expectations from the beginning.
- Hold regular, planned review meetings and provide constructive feedback.
- Address concerns promptly, giving the employee a reasonable opportunity to improve.
- Document discussions, agreed actions, support provided and review outcomes.
- Apply company policies and procedures consistently and ensure decisions are fair, reasonable and non-discriminatory.
- Monitor the probation end date and allow sufficient time to review performance and communicate the outcome before the period expires.

Probation Period Checklist

Commencement of Employment

- [ ] Confirm the probation duration and conditions are included in their contract
- [ ] Explain the role, responsibilities, expected standards and key objectives
- [ ] Explain relevant policies, procedures and performance expectations.
- [ ] Identify training, resources and support required.
- [ ] Schedule the three month, five month and final review meetings.

First Formal Review - 3 months

- [ ] Discuss job knowledge, skills and quality of work
- [ ] Review attendance, punctuality, conduct, initiative and working relationships.
- [ ] Provide specific examples of satisfactory performance and areas for improvement.
- [ ] Agree clear actions, support and realistic deadlines where required.
- [ ] Record the discussion, agreed actions and the next review date in writing.

Progress and Outcome Review - 5 months

- [ ] Review progress against previous actions
- [ ] Raise any continued or outstanding concerns, factually
- [ ] Give the employee an opportunity to respond and raise concerns.
- [ ] Confirm what improvement is still required, with support and a reasonable timeframe.
- [ ] Assess whether the employee is on track to meet the role requirements

Final Review and Decision - 6 months

- [ ] Review overall performance and progress throughout probation
- [ ] Consider the employee's responses and any relevant circumstances.
- [ ] Confirm the decision and communicate it to the employee in writing before the probation period expires.
    - [ ] If extending, include the extension date

***Note**: The three, five and six month reviews are MSS's suggested management schedule, not statutory review dates.*

MSS The HR People

What should be discussed during reviews?

Job knowledge and key skills



Does the employee understand the role and demonstrate the skills and knowledge required?

Quality and standard of work



Is work accurate, completed on time and meeting the expected standard?

Cooperation and working relationships



Does the employee work effectively with colleagues, managers and customers where relevant?

Attendance and punctuality



Is the employee meeting attendance and timekeeping expectations, taking account of relevant circumstances and statutory rights?

Initiative and general conduct



Does the employee demonstrate appropriate judgement, professionalism and willingness to learn?

MSS
The HR People

If performance concerns arise

- [ ] Address concerns early

  Do not wait until the next formal review. Explain the concern, provide examples and allow the employee to respond.

- [ ] Agree an improvement plan

  Set clear expectations, identify support or training needed, agree measurable improvements and provide a reasonable timeframe.

- [ ] Document and follow up

  Record the discussion, agreed actions, support offered and consequences that may arise if the required standard is not achieved.

- [ ] Seek HR guidance where needed

  Consult HR before making decisions about extending probation, terminating employment or dealing with complex performance, conduct, health or equality concerns.

HR Compliance Reminder

- ✓ Set clear expectations from the beginning of probation
- ✓ Hold regular review meetings and document
- ✓ Give employees a reasonable opportunity to improve
- ✓ Apply policies and procedures consistently and make fair, non discriminatory decisions
- ✓ Monitor probation end dates and communicate the outcome before the period expires

MSS Compliance Tip

Address performance concerns early, provide specific examples and agree clear improvement actions and support. Do not wait until the final probation review to raise concerns, and seek HR guidance before making decisions about extending probation or ending employment.

MSS
The HR People

MSS
The HR People

01 887 0690

mssthehrpeople.ie

info@mssthehrpeople.ie