**Probationary Progress Review Fact Sheet**



# Purpose of the form:

The Probationary Progress Review is used to assess a newly hired or re-hired classified employee’s progress towards learning job responsibilities and demonstrating strong capability for job performance during their probationary period. It is the university's policy to require satisfactory completion of a 12-month probationary period as a prerequisite to continued employment with the university for all classified employees.

# When to prepare the form:

A Probationary Progress Review must be conducted at 3, 6, 9, and 12 months. The 12-month review should be conducted three weeks prior to the probationary period end date.

An interim Probationary Progress Review may be completed at any time during the probationary period to document performance or to provide feedback to the employee. Any forms used for this purpose should be clearly labeled as “interim” after checking the “Other” box in Section 1.

Note: When the probationary period is extended, a new probationary end date is established, and the employee must be notified by checking the appropriate box on the Probationary Progress Review.

# Who prepares the form:

The immediate supervisor prepares the Probationary Progress Review at the appropriate intervals and discusses the rating and comments with the reviewer (usually the supervisor’s supervisor). Both the supervisor and reviewer sign the form. The immediate supervisor then meets with the employee to discuss their progress towards meeting established performance expectations. The employee is the last person to sign the form.

# Retention:

Once signed, the Probationary Progress Review must be sent to Human Resources for retention in the employee’s personnel file. Supervisors retain a copy of the signed form and any supporting documentation. The employee is given a copy of the signed form, as well as any attachments.

# Whom to contact:

Supervisors must contact their [HR Consultant](http://www.jmu.edu/humanresources/hrc/index.html) prior to issuing a Probationary Progress Review with an “unsuccessful” rating, prior to extending an employee’s probationary period, and prior to terminating a probationary employee.

**Related Policies:**

[JMU Policy #1322 Classified Probationary Period](https://www.jmu.edu/jmu-policy/policies/1322.shtml)

[DHRM Policy #1.45 Probationary Period](https://www.dhrm.virginia.gov/docs/default-source/hrpolicy/pol1_45probation.pdf)

**Probationary Progress Review**

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| --- | --- | --- |
| Employee Name | Employee ID | Hire Date |
| Working Title | Department | Supervisor Name |
| **Section 1: Check the applicable review period** [ ] 3-month [ ] 6-month [ ] 9-month [ ] 12-month [ ] Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Section 2: Provide feedback on the positive factors/contributions that the employee has accomplished and outline areas of concern that the employee needs to improve upon.** [ ]  Optional attachments added |
|  |
| **Section 3: Indicate the overall performance rating**[ ]  **Successful** Performance shows consistent achievement toward meeting established performance expectations[ ]  **Unsuccessful** Performance shows deficiencies that interfere with the attainment of performance expectations (Complete an Employee Development Plan in Section 4)  |
| **Section 4: Establish an Employee Development Plan.** Must be completed for employees receiving an Unsuccessful rating[ ]  Optional attachments added |
| Performance Expectations | Steps/Resources |
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |
| **Section 5: End of Probationary Period**[ ]  Probationary period has been satisfactorily completed (typically at the 12-month interval)[ ]  Probationary period has been extended until [ ]  Employment is being terminated effective \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (contact your [HR Consultant](http://www.jmu.edu/humanresources/hrc/index.html)) |
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| **Section 6: Signatures** |
| Supervisor Comments |
| Supervisor Signature | Date  |
| Supervisor Name Printed |
| Reviewer Comments |
| Reviewer Signature | Date |
| Reviewer Name Printed |
| Employee Comments |
| Employee Signature | Date |
| Employee Name Printed |
|  |

