The purpose of the probationary, qualifying or trial period is to provide an opportunity for both Regular and Temporary employees to demonstrate that with appropriate orientation, support, and feedback, they are able to meet the expectations of the position. If there are concerns, or any reason to doubt the employee will be successful in the position, the supervisor must contact their assigned [HR Consultant](https://www.uvic.ca/hr/contact/index.php) as early as possible prior to the expiry of the applicable period listed below. See the [Probation Process document](https://www.uvic.ca/hr/assets/docs/hrc/performance-development/performance-planning-review/probationprocess_updatedJune22.docx) for an overview of the process and submit your completed documents to hrassistant@uvic.ca.

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| --- |
| **Probation Review Information Form*****For CUPE 951, PEA, Management Excluded and Exempt Support employees\**** |
| Employee Name:  | Employee V#:  |
| Job Title: | Department:  |
| Supervisor Name:  | Job Title: |
| Employee Start date:  | Probation/Trial End Date:  |
| **Employee Group** | **Type of Review** | **Review Period** | **Check-in Intervals** | **Collective Agreement****Or Terms and Conditions section** |
| [ ]  CUPE 951 | Probationary/trial | 3 months | 30, 60 and 80 days | [Article 16.07 \*](https://www.uvic.ca/hr/assets/docs/labourrelations/collectiveagreements/951_ca_2022-2025.pdf) |
| [ ]  PEA | Probationary | 8 months | 2, 4 and 6 months | [Article 5.02](https://www.uvic.ca/hr/assets/docs/labourrelations/collectiveagreements/pea-ca-2022-to-2025-website-oct23.pdf) |
| [ ]  ME | Probationary | 12 months | 3, 6 and 9 months | Section 1.4 |
| [ ]  Exempt  | Probationary/Qualifying | 3 months | 30, 60 and 80 days | Probationary/Qualifying Period  |
| \*CUPE 951 employees will receive a pay step increment after the successful completion of the probationary or trial period\*\*CUPE 917 employees have a 3-month probation (some positions 6 months) and use a different process and a separate form, Probationary Review Form CUPE 917, which you can find in the [forms tab](https://www.uvic.ca/hr/forms/index.php) on the HR website. Please contact your HR Consultant if you need support.  |

## Step 1 – Probationary planning

Supervisors may access resources to plan for the initial meeting on the [Onboarding and Orienting New Employees](https://www.uvic.ca/hr/manager-support/onboarding/index.php) webpage, and employees may prepare for the initial meeting by reviewing the departmental orientation checklist and by visiting the [New Staff and Faculty](https://www.uvic.ca/faculty-staff/info-for/new-faculty-and-staff/index.php) webpage.

Performance Plan: Include 3 to 5 key responsibilities (as per the job/role description), with clear expectations and measures for each responsibility.

|  |  |
| --- | --- |
| **Key Job Specific Responsibility #1** |  |
| **Responsibility** Summarize in two to five words. |  |
| **Expectations** Clarify in a few short bullets what is expected to effectively meet this responsibility.in a few bullets what is expected to be successful | *
*
*
 |
| **Measures** Identify 1 to 3 observable measures of success that can be demonstrated and discussed at each check-in meeting. | 1.
2.
3.
 |
| **Key Job Specific Responsibility #2** |  |
| **Responsibility** Summarize in two to five words. |  |
| **Expectations** Clarify in a few short bullets what is expected to effectively meet this responsibility.in a few bullets what is expected to be successful | *
*
*
 |
| **Measures** Identify 1 to 3 observable measures of success that can be demonstrated and discussed at each check-in meeting. | 1.
2.
 |
| **Key Job Specific Responsibility #3** |  |
| **Responsibility** Summarize in two to five words. |  |
| **Expectations** Clarify in a few short bullets what is expected to effectively meet this responsibility.in a few bullets what is expected to be successful | *
*
*
 |
| **Measures** Identify 1 to 3 observable measures of success that can be demonstrated and discussed at each check-in meeting. | 1.
2.
 |

*Cut and paste the table to add more Key Responsibilities as needed.*

### Employee Learning and Support Plan: Discuss strengths, areas of development and learning goals. Explore [employee learning opportunities](https://www.uvic.ca/hr/learning-development/employee-learning/index.php). Identify support to be provided.

|  |  |
| --- | --- |
| **What is to be learned?**  | **What support will be provided?** |
| **Learning Goal #1:**  |  |
| **Learning Goal #2:**  |  |
| **Learning Goal #3:**  |  |

## Step 2 - Probationary/Trial period Progress and check-ins

Check-in meetings to discuss progress occur at the intervals identified in the table on page 1 for each employee group. The employee completes the Employee Progress section prior to the meeting and the supervisor assesses progress and provides feedback, coaching and support. Goals, measures and learning plans may also be modified if required. The supervisor will confirm if the employee’s work meets expectations and if not, what improvement is required.

|  |  |  |
| --- | --- | --- |
| **Check-in Date** | Employee progress (Employee completes prior to meeting) | Supervisor Feedback and Coaching Summary |
| **Check-in #1** Date: |  | [ ]  Meets expectations[ ]  Improvement required (explain below and contact your [HR Consultant](https://www.uvic.ca/hr/contact/index.php) for assistance)**Supervisor Comments:** |
| **Check-in #2** Date: |  | [ ]  Meets expectations[ ]  Improvement required (explain below and contact your [HR Consultant](https://www.uvic.ca/hr/contact/index.php) for assistance)**Supervisor Comments:** |
| **Check-in #3** Date:  |  | [ ]  Meets expectations[ ]  Improvement required (explain below and contact your [HR Consultant](https://www.uvic.ca/hr/contact/index.php) for assistance)**Supervisor Comments:** |

## **Step 3 - Final Probationary/trial Period Review**

|  |  |  |
| --- | --- | --- |
| **Final Review Questions** | **Employee Responses** | **Supervisor Responses** |
| Top 3 to 5 successes |  |  |
| Where would further development, coaching or training be beneficial? |  |  |
| As you transition to the annual [Performance and Development Cycle](https://www.uvic.ca/hr/manager-support/performance-coaching/development-cycle/index.php) what goals can you bring forward?  |  |  |

## **Final Probationary/trial Period ASSESSMENT**

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| --- |
| **Probationary/Trial Period Recommended Action Completed by Supervisor** |
| [ ]  **Meets Expectation**s: Successful Completion of Probationary Period |
| [ ]  **Requires Improvement**: Extension of Probationary/Trial period for \_\_\_\_ months. Please contact your [HR Consultant](https://www.uvic.ca/hr/contact/index.php) for assistance and guidance on collective agreement requirements in the event of an extended probation period.  |
| [ ]  **Does not Meet Expectations**: Probationary Period Not Successfully Completed. Please contact your [HR Consultant](https://www.uvic.ca/hr/contact/index.php) for assistance and guidance on collective agreement requirements. **\* Explain:** (attach additional documentation as appropriate)  |
| **Supervisor Review and Signature** | **Employee Review and Signature** |
| *­­­­­­­­­­­­­­­**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employee Signature Date*Signing does not indicate endorsement, only acknowledgement that the Probationary Review has been discussed. If the employee does not agree with any part of the review after it has been discussed, they are encouraged to comment below.* **Employee Comments (add/attach if needed):**  |
| *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Supervisor Signature Date **Supervisor Comments (add/attach if needed):** |