



## Purpose

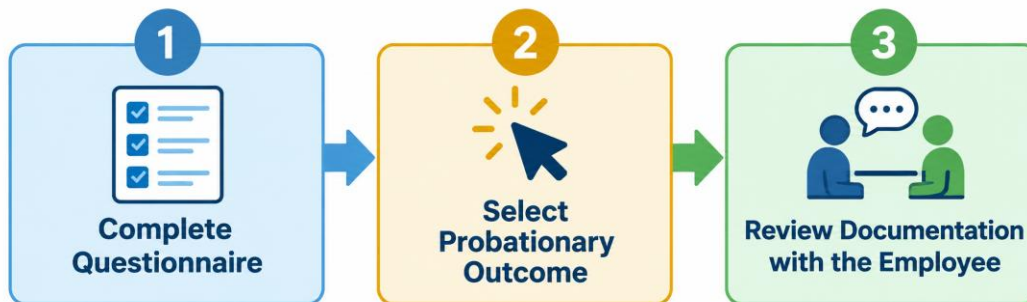
This job aid explains how managers complete an employee's probationary period review and record the outcome in Workday.

A probationary period provides a defined period for managers to review an employee's performance and determine the appropriate outcome in Workday. For non-exempt new hires and transfers, the probationary period is **90 days**. Managers will be automatically prompted to complete a Workday task **30 days** prior to the end of the probationary period.

**Important:** For more details about the policy, please reference the [Probationary Period Policy](#).

## Manager: How to Review a Probationary Period

There are three main steps for a manager to take. **Note:** If an extension is requested, steps 1 & 2 will be repeated.



1. Begin by opening the **Probation Questionnaire for Manager task (questionnaire)** from your Workday Inbox. Answer each question based on the employee's probationary-period performance and add comments as appropriate.

Complete Questionnaire 'Probation Questionnaire for Manager' for Review Probation Period on 09/10/2026

Probation Questionnaire for Manager

The probationary questionnaire below will be exported into a probationary review document and provided to the employee. Please complete a thorough review of the employee's performance. **After selecting "Submit," you will indicate the appropriate probationary outcome: whether the employee is successful; requires a 30-day extension due to variable performance; or is unsuccessful, resulting in termination. Selecting successful will automatically deliver the completed performance review to the employee in a PDF format. Even though the performance review will be automatically delivered, you should still review the performance review document with the employee. Selecting a 30-day extension or termination outcome will inform your unit HR Partners, who will then coordinate the appropriate next steps, forgoing immediate delivery to the employee.** Following receipt of the completed probationary review, the employee will acknowledge receipt of the document and be able to add their own comments recorded in the comment section of the Workday Business Process. **For union employees, please review the appropriate collective bargaining agreement for appropriate criteria and procedures for probationary extensions or terminations.**

Have you reviewed the position description with the employee?

☐ YES

☐ NO

Have you provided the employee with a copy of the position description?

☐ YES

☐ NO

**Submit** Save for Later Cancel

2. Complete the **Submit Probation Period Review** task (outcome step). Select the appropriate outcome from the options below, then click Submit.

#### Probationary Outcome Options:

| Outcome                       | What happens next:                                                                                                                                                                                                                                                                             |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Successfully Completed</b> | The probation process is completed. The employee receives the applicable probation documentation, including a copy of the review questionnaire, in their Workday record.                                                                                                                       |
| <b>Extend Probation</b>       | The request routes to the appropriate HR representative for review. A new probation review period is established, if approved. Repeat steps noted above. Once successfully completed, the employee will receive the applicable probation documentation via their Workday record.               |
| <b>Terminate</b>              | The transaction routes to the HR office for the appropriate termination processing. HR will work with the manager to initiate the Termination event. The employee will receive the applicable probation documentation, including a copy of the review questionnaire, via their Workday record. |

### 3. Meets with the Employee to Review the Probation Summary Review Document

When the probation period is successfully completed, the employee receives the applicable probation documentation via their Workday Inbox. The **Probation Summary Review Document** summarizes the probation review information, including the questionnaire results.

The manager meets with the employee to review the documentation as part of the probationary-period process.

**Important:** This document is viewable on the employee's Workday worker profile via the **Personal** menu option, **Documents** tab.

Name:  
Employee ID:  
Supervisory Organization: HR - HR Information Systems  
Manager:  
Job Title: Project Administrative Assistant  
Band: C

Employment Date: 08/03/2026  
Date Probation Period Ends: 10/31/2026

• Have you reviewed the position description with the employee? YES  
• Have you provided the employee with a copy of the position description? YES

How would you rate the employee's performance in the following areas, considering expectations for this stage of employment?

• Knowledge of Job: Meets Job Standards  
• Productivity: Meets Job Standards  
• Quality of Work: Meets Job Standards  
• Work Attitude & Cooperation: Exceeds Job Standard  
• Dependability: Meets Job Standards  
• Initiative: Meets Job Standards

Are there certain areas where the employee excels? Specify: This employee has done an excellent job learning and taking on her new responsibilities. She is customer-focused, proactive, and a strong team player. Her previous HR and Workday experience have provided a strong foundation, allowing her to transition into her new role with ease.

Are there areas where improvement is desirable? Specify: I hope to see her continue to take initiative in developing a deeper understanding of the customer's perspective. We discussed job-shadowing opportunities within a few colleges/ units as one way she can continue to expand her knowledge and gain valuable insight into the customer experience.

Do you wish to retain this employee?  
Comments: Grateful to have her part of the team.

### What Happens When a Manager Selects "Extend Probation"

1. HR reviews the manager's questionnaire responses, comments, requested outcome, and extension reason.
2. The employee will receive a **Probation Summary Review** document indicating their probation is being extended.
3. If the extension is approved, new probation end and review dates are established.
4. When the Review Date is reached, a **new Review Probation Period** task is sent to the manager's Workday Inbox and steps 1 & 2 of the process are repeated.

**Manager action:** Meet with the employee to review the Probation Summary Review Document. The document can be accessed by having the employee log into their own Workday profile. After reviewing the document, the employee will attest in Workday that they have received it using their employee Workday profile.

## What Happens If the Manager Selects 'Terminate' as an Outcome

HR reviews the manager's questionnaire responses, comments, requested outcomes, and comments. They will partner with the manager on next steps.

**Manager action:** The manager will work closely with their HR Rep to determine next steps, which may include meeting with the employee and reviewing termination documentation as part of the termination process.

## Managing the Process

### *Is there a report managers can use to monitor the process?*

Yes, the **Review Probation Period by Supervisory Organizations** report: This report returns workers with a probationary period that falls within the specified date prompt range. It includes details on the overall probation review outcome as well as any steps that are currently awaiting action.

### *What if a questionnaire response is accidentally omitted or is not completed by the deadline?*

Managers should contact their HR Rep immediately for further guidance.

## Recap: Quick Reference

| If you need to...                      | Do this in Workday                                                                                                                                                                                                                             |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Complete a successful probation review | 1. Open <b>Review Probation Period</b> from your Workday Inbox. Complete and submit the <b>Probationary Questionnaire</b> .                                                                                                                    |
|                                        | 2. Complete <b>Probation Outcome</b> and select Successfully Completed as the outcome and submit.                                                                                                                                              |
|                                        | 3. Meet with the Employee to review <b>Probation Summary Review Document</b> .                                                                                                                                                                 |
| Extend the probationary period         | 1. Open <b>Review Probation Period</b> from your Workday Inbox. Complete and submit the <b>Probationary Questionnaire</b> .                                                                                                                    |
|                                        | 2. Complete Probation Outcome and select <b>Extend Probation</b> as the outcome and submit. The employee will receive notice that their probationary period is being extended. When the extension is approved, managers will repeat steps 1&2. |
|                                        | 3. Meet with the Employee to review <b>Probation Summary Review Document</b> , upon reaching a successful probation review status.                                                                                                             |
| Start termination processing           | 1. Open <b>Review Probation Period</b> from your Workday Inbox. Complete and submit the <b>Probationary Questionnaire</b> .                                                                                                                    |
|                                        | 2. Complete Probation Outcome and select <b>Terminate</b> as the outcome and submit.                                                                                                                                                           |
|                                        | 3. Work closely with the HR Rep to determine next steps, which may include a manager meeting with the employee and review of the probationary documentation as part of the termination path.                                                   |