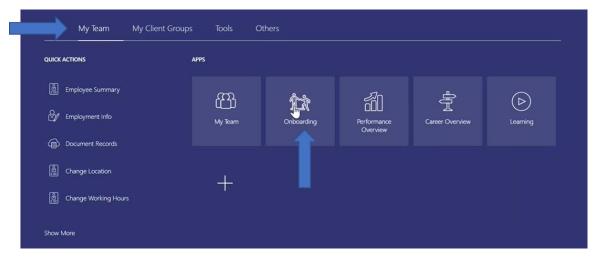
The Probation Process as a Line Manager

Step 1: Probation Check-ins

Check-ins should be conducted for Academic Staff at their 3- month, 6- month and 9-month review. While, for Professional Services Staff it should only be carried out at the 3-month review.

1. To start the probation process, go to My Team > Onboarding. Here you will see any outstanding tasks you have to do for the probation period.



2. Select the relevant task for your employee. For Professional Services Staff this will be the 3month review. While Academic Staff at will use the check-in at their 3- month, 6- month and 9month review.

arch by person name or task \bigcirc Show Filters	
	Sort By Due Date - Oldest to Latest
SS 3 Month Review Sarah Smith	
SS 6 Month Review Sarah Smith	

*Note – If the tasklist is blank, navigate instead to the Performance Overview tile. Then select your employee from the list of staff and skip to point 4.

Me	My Team	Support N	My Client Groups	Tools	Others		
QUICK AC	TIONS		APPS				
E	mployee Summary		<u>ب</u>	o G	0	-Zn	
©∕∕ E	mployment Info		My Team	<u>Dnboa</u>	rding	Performance Overview	
	ocument Records						

3. Then click **Go to Task** on the following page.

3 Month Review Sarah Smith	Go to Task	Complete Actions ~]
Contact Info	T	~	
3 Month Review		^	
This employees 3 month mid-probation review is now due. To complete the review, use a "Probation Progress Review Meeting' Check-In document.			

4. Ensure the Review Period is set to **Probation Review Period.** Then select **Add** next to the Check-Ins to launch the probation questionnaire.

Review Period		
- Lim		
Check-Ins		Add ^
	There's nothing here so far.	

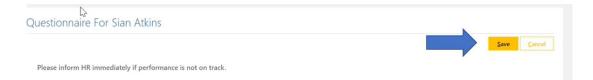
5. Ensure the Template is set to Probation Progress Review Meeting. Then select Save.

etails			
Review Period Probation Review Period	∑₂	*Manager Sian Atkins	<u>Save</u> <u>Cancel</u>
Probation Progress Review Meeting V		*Date	
*Name			
Probation Progress Review Meeting 23/11/2021			

6. You will now be able to edit the probation questionnaire along with viewing any objectives or development goals that have been set. To complete a section of the review, select Edit. You are required to complete all questions that are marked with an asterisk as well as selected the outcome of the progress meeting.

Questionnaire For Sian Atkins	🖉 Edit
Please inform HR immediately if performance is not on track.	
Summary of achievement against Performance Goals	
Please list the Development Activities carried out with Date	

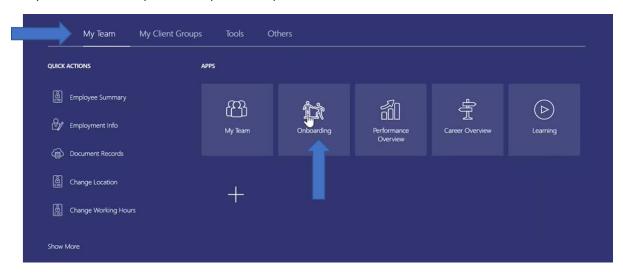
7. Once you have completed the questionnaire select **Save**.



Step 2: Probation Final Review

The final review should be conducted at 12-months for Academic Staff. While, for Professional Services Staff it should be carried out at 6-month.

1. To begin the Final Review, go to **My Team > Onboarding.** Here you will see all the latest tasks you have to do as part of the probation process.



2. Select the relevant task for your employee, this will be either a 6-month review for Professional Services Staff or a 12-month review for Academic Staff.

arch by person name or task Q Show Filters	
	Sort By Due Date - Oldest to Latest
SS 3 Month Review Sarah Smith	
SS 6 Month Review	

*Note – If the tasklist is blank, navigate instead to the Performance Overview tile. Then select your employee from the list of staff and skip to point 4.



3. Then select **Go to Task** at the top of the page.

Go to Task	Complete	Actions~
	~	

4. Ensure the Review Period is set to Probation Review Period



5. To review any of the Check-Ins held as part of the probation process select the title of the **Probation Progress Review Meeting** within the Check-ins.

Check-Ins			+ Add	^
			Sort By Date - Latest to Oldest	~
Probation Progress Review Meeting 23/11/2021 Probation Progress Review Meeting	3	Discussed With Sian Atkins 23/11/2021		

6. Next to Anytime Documents select Add to set up your final probation review.

Anytime Documents		+ Add ^
All		
	There's nothing here so far.	

7. Select End of Probation Review as the Performance Document Name. Then select Save.

	0	Save Cance
*Performance Document Name	*To Date	,
End of Probation Review	31/12/2050	60
Description	*Performance Document Manager	
	Sian Atkins	~

8. To launch the end of probation questionnaire, select End of Probation Review.

Anytime Documents		🔶 Add
All		
End of Probation Review	By Sian Atkins No participants	
Current Task Manager Evaluation	Task Completion	
All Tasks Manager Evaluation Share Performance Document Acknowledge Performance Document HR Approval	Ĺ∂-	

9. Under **Evaluation Topics** you can evaluate how they met their objectives through the values of the university eg. Collaboration, Impactful and Inclusivity.

You should also add comments for how they performed against their Objectives as well and Development Goals.

Values/Behaviours	Eval
3 of 3 commented	
Performance Objectives	Eval
1 of 1 commented	
Career and Development Objectives	Eval
1 of 1 commented	

Once each section is completed click Save and Close. You can edit these sections again.

Evaluate Topic Performance Objectives ^{Sarah Smith}	Save and Close	Cancel	

10. You are also required to complete the Questionnaire, by selecting **Evaluate**.

You are required to complete all questions that are marked with an asterisk as well as selected the outcome of the progress meeting.

Values/Behaviours	Eval
3 of 3 commented	
Performance Objectives	Eval
1 of 1 commented	Eyen
Career and Development Objectives	Eval
1 of 1 commented	Eval

11. Once you are happy with all the information you have inputted as part of the Final Review, select **Submit**.

Manager Evaluation: End of Probation Review	Print	Sub <u>m</u> it
Sarah Smith		

12. If you have not completed all the required sections, you will receive an error message.



Step 3: Share performance documents

1. The End of Probation Review is now available to be shared with your direct report. Click on End of Probation Review to review the content and ensure that you are happy with the feedback given.

By Sian Atkins
No participants
Task Completion
1/4

2. Once you have completed a review of the content, click **Share and Release** to send the probation review to your direct report.

	Information				
	Share the evaluation for employee review. Retain control or	Share and Retain	Share and Release		
~	release to progress to the next task.	0	6		

3. You will be asked to provide a comment to notify your direct report that the probation review has been released.

Shar Sarah S	e and Release ^{Smith}	Submit	<u>C</u> ancel
Со	mments		
	Tahoma • 2 • B I U III III III III III III IIII II		

Step 4: Employee Acknowledge Probation Review

- 1. The probation review is now the employee.
- 2. Once they have reflected on the comments, they will Acknowledge the Document moving the process onto the final stage, HR Approval.