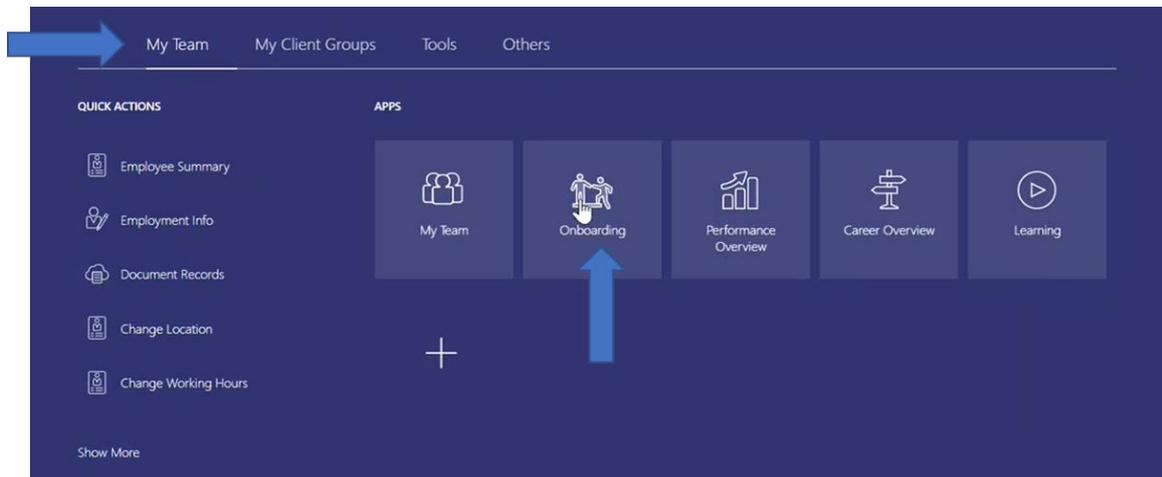


## The Probation Process as a Line Manager

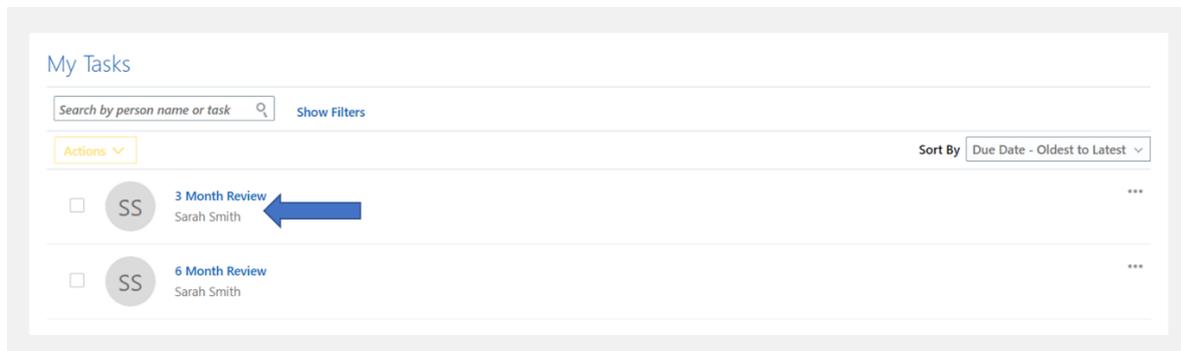
### Step 1: Probation Check-ins

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.

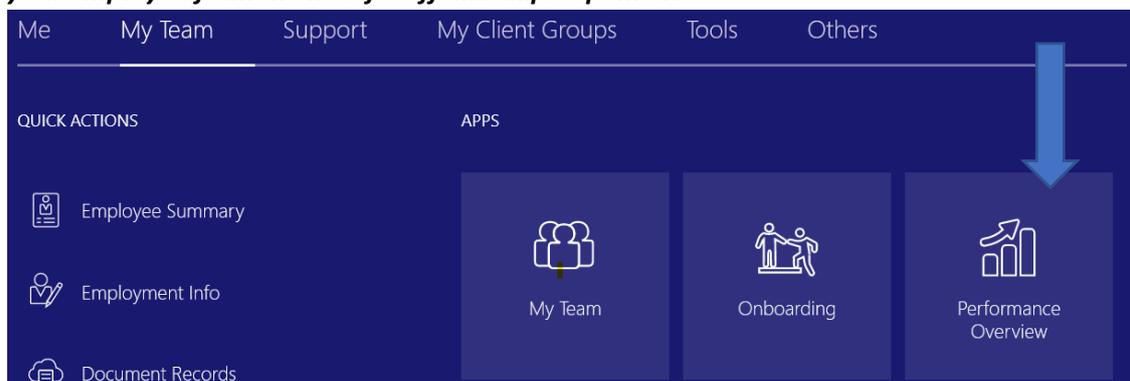
1. To start the probation process, go to **My Team > Onboarding**. Here you will see any outstanding tasks you have to do for the probation period.



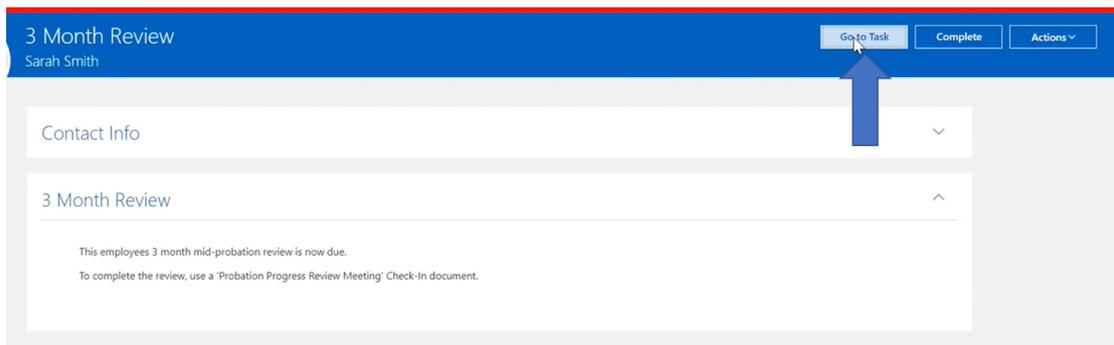
2. Select the relevant task for your employee. For Professional Services Staff this will be the 3-month review. While Academic Staff at will use the check-in at their 3- month, 6- month and 9- month review.



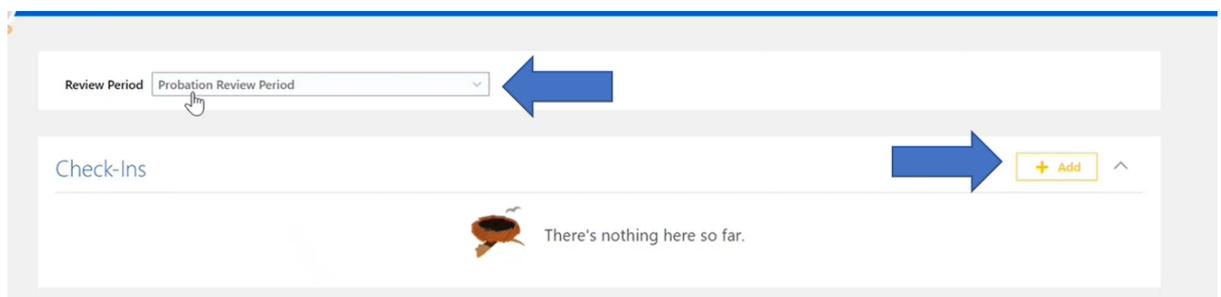
***\*Note – If the tasklist is blank, navigate instead to the Performance Overview tile. Then select your employee from the list of staff and skip to point 4.***



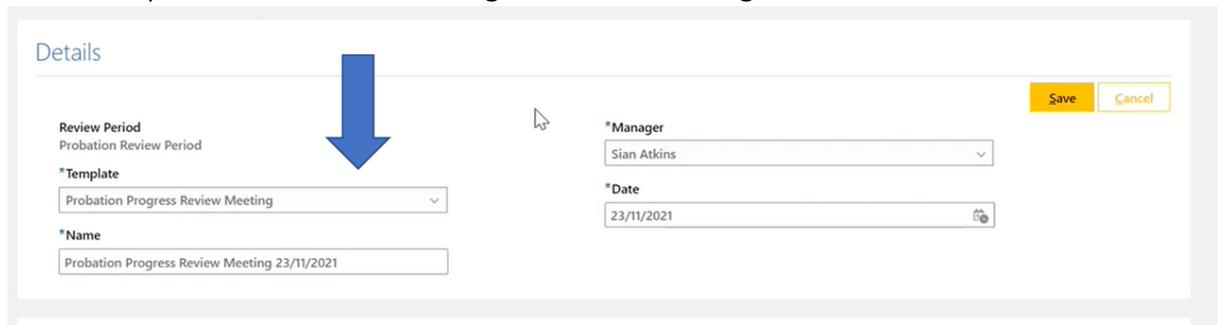
3. Then click **Go to Task** on the following page.



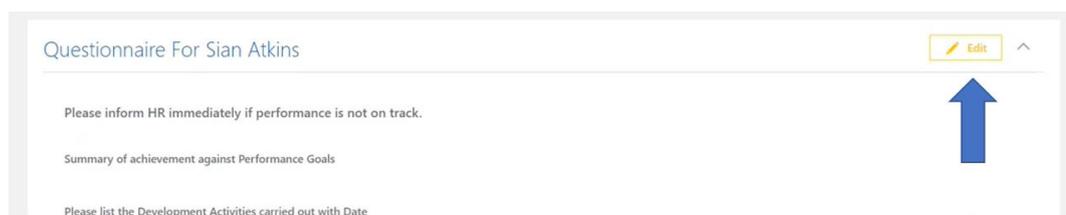
4. Ensure the Review Period is set to **Probation Review Period**. Then select **Add** next to the Check-Ins to launch the probation questionnaire.



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



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.



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

Questionnaire For Sian Atkins



Save

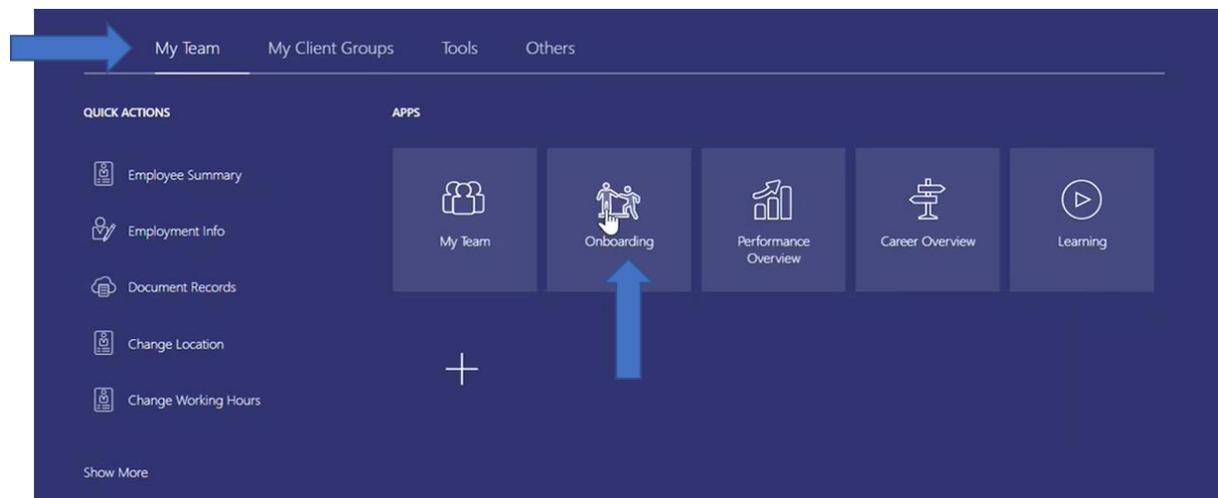
Cancel

Please inform HR immediately if performance is not on track.

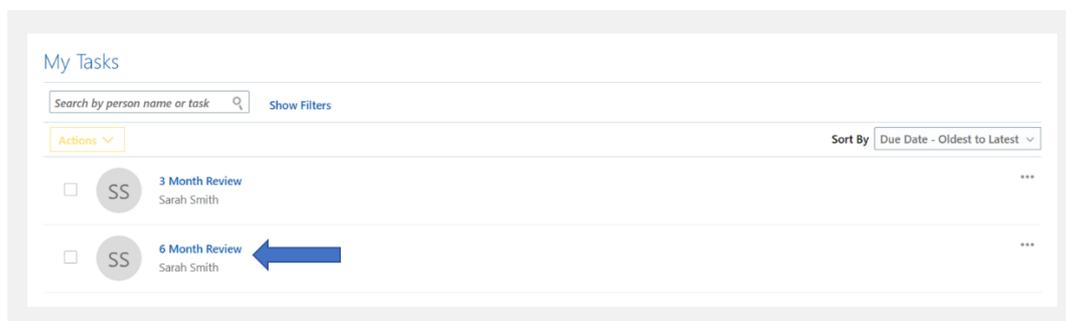
## Step 2: Probation Final Review

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.

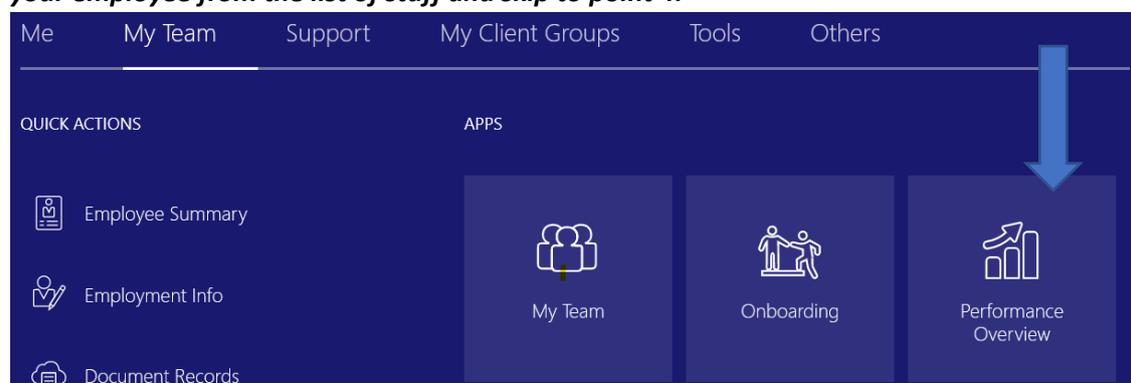
1. To begin the Final Review, go to **My Team > Onboarding**. Here you will see all the latest tasks you have to do as part of the probation process.



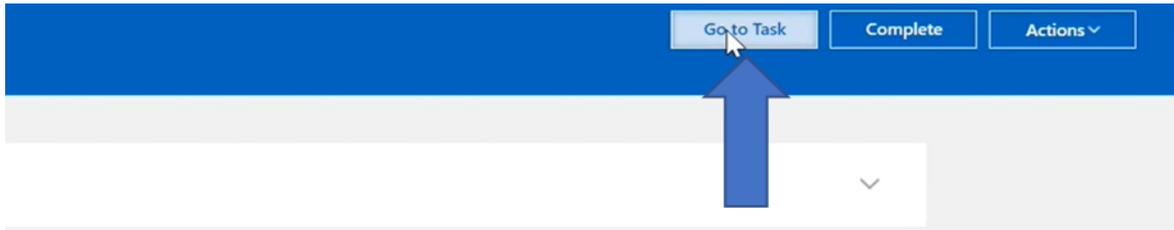
2. Select the relevant task for your employee, this will be either a 6-month review for Professional Services Staff or a 12-month review for Academic Staff.



**\*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.**



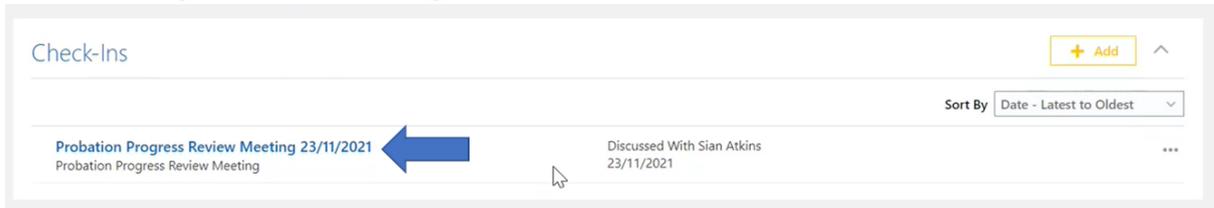
3. Then select **Go to Task** at the top of the page.



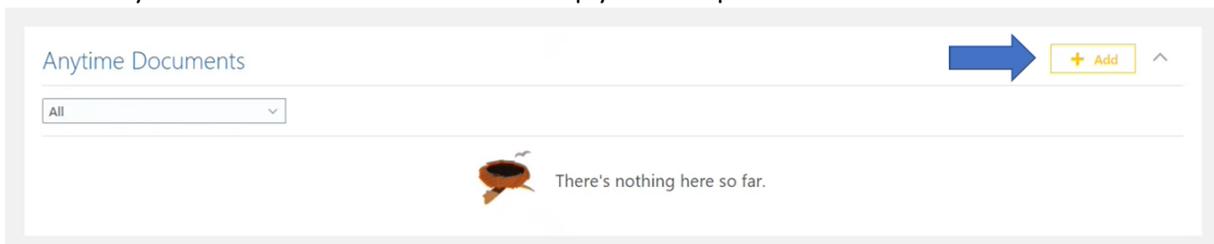
4. Ensure the Review Period is set to **Probation Review Period**



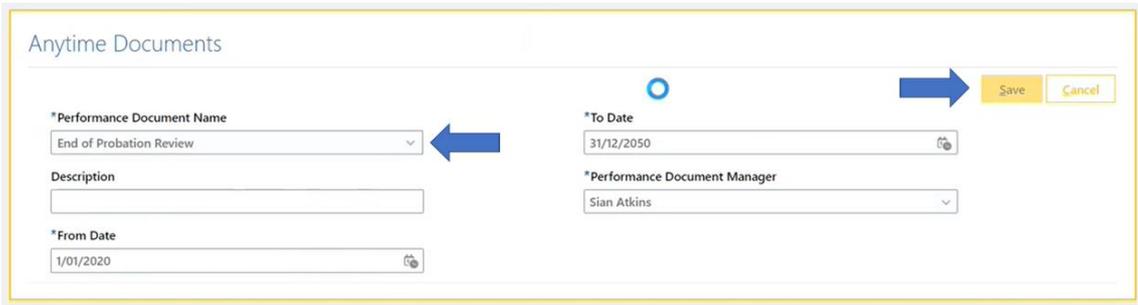
5. To review any of the Check-Ins held as part of the probation process select the title of the **Probation Progress Review Meeting** within the Check-ins.



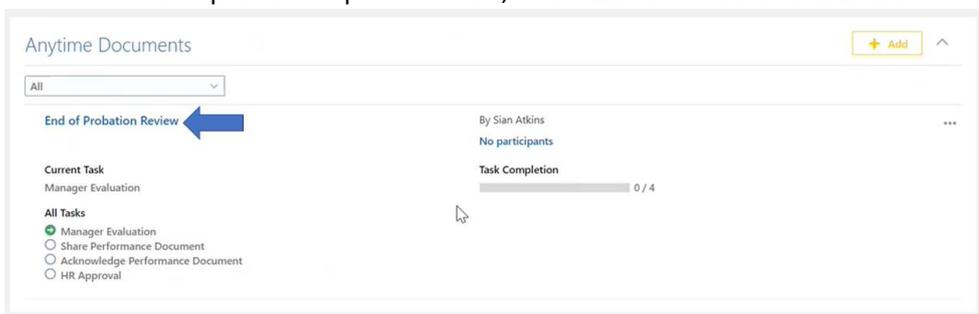
6. Next to Anytime Documents select **Add** to set up your final probation review.



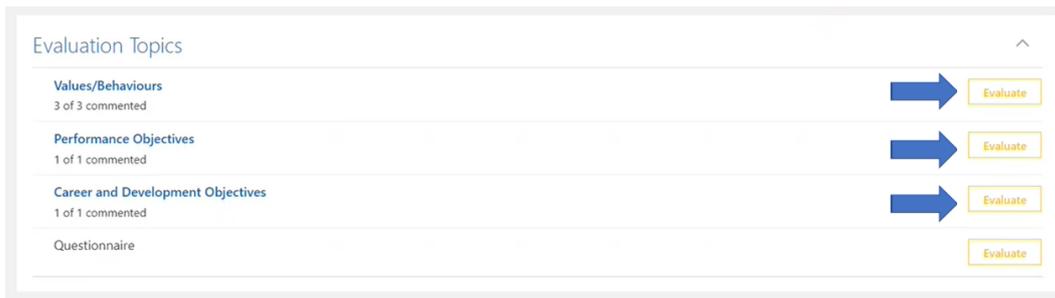
7. Select **End of Probation Review** as the Performance Document Name. Then select **Save**.



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



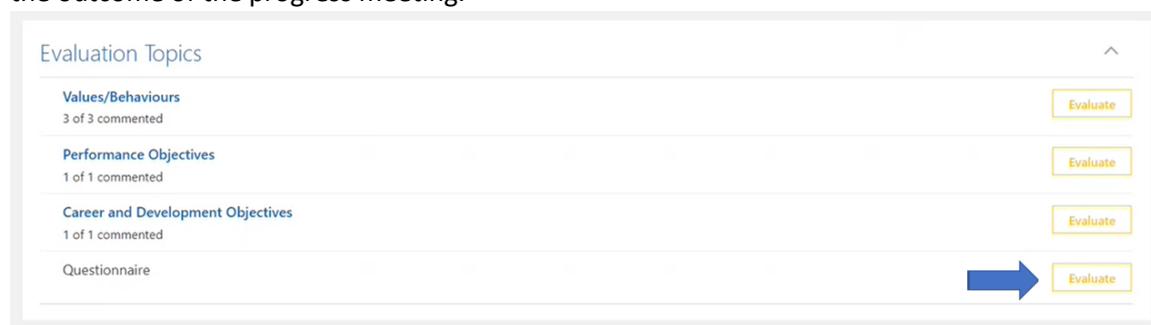
9. Under **Evaluation Topics** you can evaluate how they met their objectives through the values of the university eg. Collaboration, Impactful and Inclusivity. You should also add comments for how they performed against their Objectives as well and Development Goals.



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



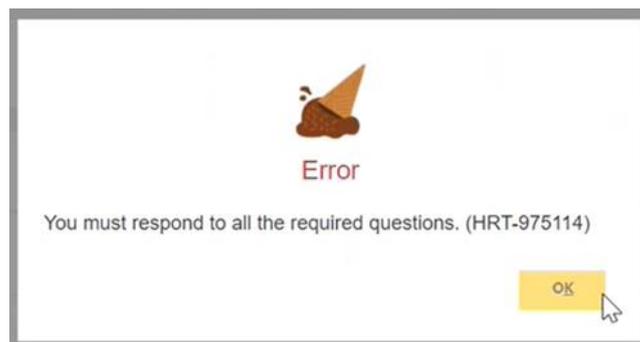
10. You are also required to complete the Questionnaire, by selecting **Evaluate**. You are required to complete all questions that are marked with an asterisk as well as selected the outcome of the progress meeting.



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

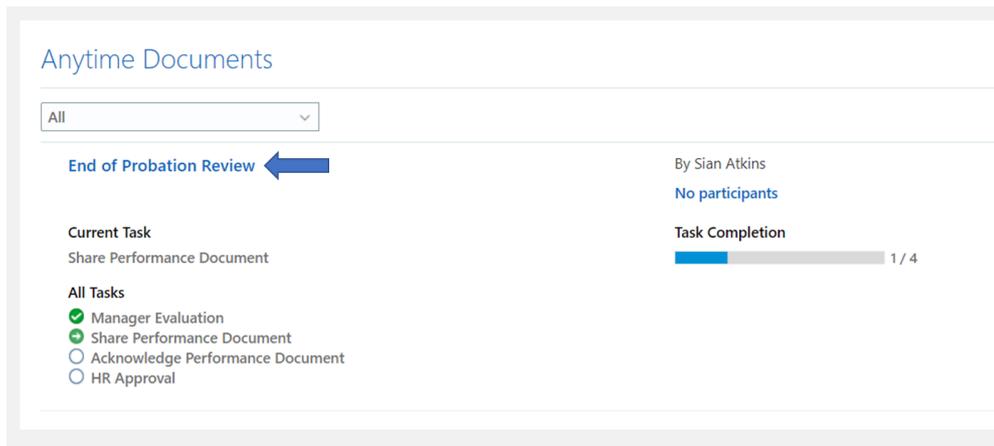


12. If you have not completed all the required sections, you will receive an error message.

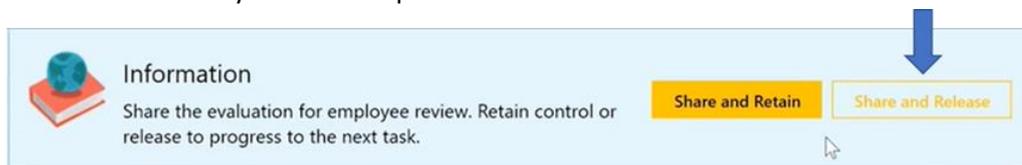


### Step 3: Share performance documents

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.



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



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



#### 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.