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1.1 Introduction

The Probation report burst report is sent to Burst Report Recipients at the beginning of each month and lists all current employees of an institution whose probation period is incomplete.

The columns in the data are:

- Institution
- Per Ref No (CHRIS Person Reference Number)
- Probationer (the name of the person on probation)
- Position (job title)
- Posn Ref No (CHRIS Position Reference Number)
- Occupancy Start (date)
- Probation Reason
- Probation Completed
- Probation Start (date)
- Probation End (date)

	A	B	C	D	E	F	G	H	I	J	K
1	School	Institution	Per Ref No	Probationer	Position	Posn Ref No	Occupancy Start	Probation Reason	Probation Completed	Probation Start	Probation End
2	UAS	Department of Training	10000000	Sally Abernethy	Studentships officer	70000010	01/07/2008	New appointment	No	01/07/2008	01/04/2009
3	UAS	Department of Training	10000001	John Brown	Administrative Officer	70000008	01/09/2008	New appointment	No	01/09/2008	01/06/2009
4	UAS	Department of Training	10000002	Barbara Chan	Administrative Officer	70000006	01/10/2008	New appointment	No	01/10/2008	01/07/2009
5	UAS	Department of Training	10000003	Sophie Clare	Temporary Administrator (Maternity Cover)	70000003	05/02/2009	New appointment	No	05/02/2009	05/05/2009
6	UAS	Department of Training	10000004	Claire Dennis	Temporary Head of Admissions (Maternity Cover)	70000009	09/03/2009	New appointment	No	09/03/2009	09/06/2009
7	UAS	Department of Training	10000005	Benedict Edwards	Administrative Officer	70000001	09/03/2009	New appointment	No	09/03/2009	09/12/2009
8	UAS	Department of Training	10000006	Elaine Edwards	Administrative Officer	70000002	11/08/2008	New appointment	No	11/08/2008	11/05/2009
9	UAS	Department of Training	10000007	Lisa Fortescue	Administrative Officer	70000004	13/08/2008	New appointment	No	13/08/2008	13/05/2009
10	UAS	Department of Training	10000008	Jane Johnson	Office Manager	70000005	15/09/2008	New appointment	No	15/09/2008	15/03/2009
11	UAS	Department of Training	10000009	Tabea Theriault	Temporary Secretary/Office Manager (Maternity cover)	70000007	18/03/2009	New appointment	No	18/03/2009	18/06/2009

The purpose of this user guide is to provide instructions to help you maintain an employee's probation details within the Trent HR system, including:

- Completing a probationary period
- Extending a probationary period
- Terminating a probationary period

Why is Probation so important?

Probation is a two way process that helps set out the requirements of the job and monitors the progress of your new starters. Probation also helps to identify any training needs and ensures that you are able to get the best possible performance from your staff. It allows problems to be picked up early and provides a forum for staff to raise concerns and receive feedback (positive and negative).

Basic Probation principles:

Managers need to hold regular progress review meetings with new starters. These meetings should:

- be held at appropriate intervals (e.g. every month or every other month)
- be constructive
- be documented on the appropriate forms

Ensure that anything planned at a review meeting is taken forward and followed up. Any concerns and improvements needed must be raised, together with details of how these can be achieved. SMART objectives/development plans should be agreed at review meetings so that staff are clear on what they need to achieve. If there are specific issues review meetings can be brought forward in order that they are addressed quickly.

If progress is good, the appointment can be confirmed at the end of the probationary period

What to do if there are problems:

There are 3 options that you can take if there are problems during probation:

- Early termination of the appointment before the end of the probationary period
- Extend the probationary period
- Terminate the appointment at the end of the probationary period.

If the decision to dismiss is made, the member of staff must be given notice and the right to appeal. All of the above **MUST** be done in liaison with your HR Adviser.

There are different schemes for different staff groups:

The basic principles, as outlined above, remain the same for all staff groups. However Academic, Academic Related, Assistant and Research staff all have individual schemes. The main differences are

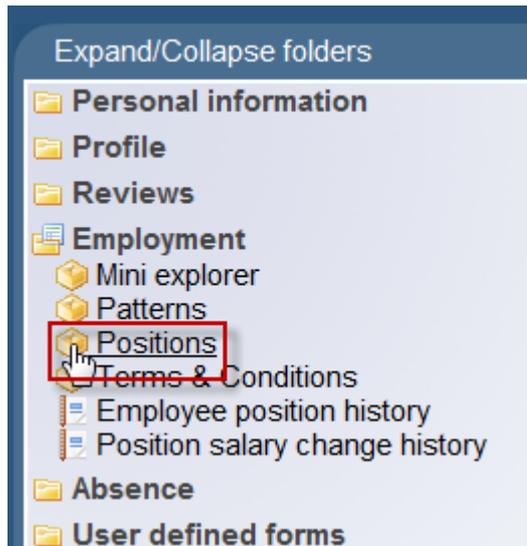
- Timescales
- Processes
- Authorising bodies
- Forms

If in any doubt, do not hesitate to contact your HR Adviser.

More information can be found at <http://www.admin.cam.ac.uk/cam-only/offices/hr/probation/>

1.2 Completing a Probation period - appointment confirmed

1. Use the search facility to locate and select the person whose details you wish to maintain
2. Open the Employment menu and choose Positions.



3. The current position will be displayed.

Job title	Start date	End date	Contract
HR Adviser [Secondment Cover]	21/10/2014		RS Monthly

If the employee held a position in the department previously, the previous and current positions will be displayed:

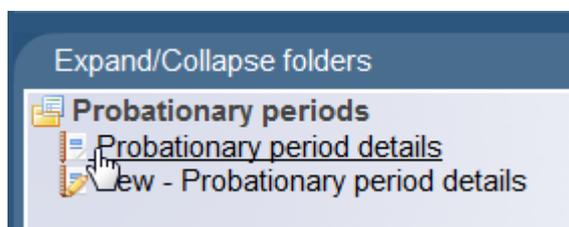
Job title	Start date	End date	Contract
HR Administrator School of Technology	23/09/2013		Asst M
HR Administrator [Leave Cover]	05/11/2012	21/09/2013	Asst M

4. Select the **current** position (this will be the one without an End date)

5. Select Probationary Periods.



6. Select Probationary period details



7. The probationary period details will be displayed. Click the complete box.

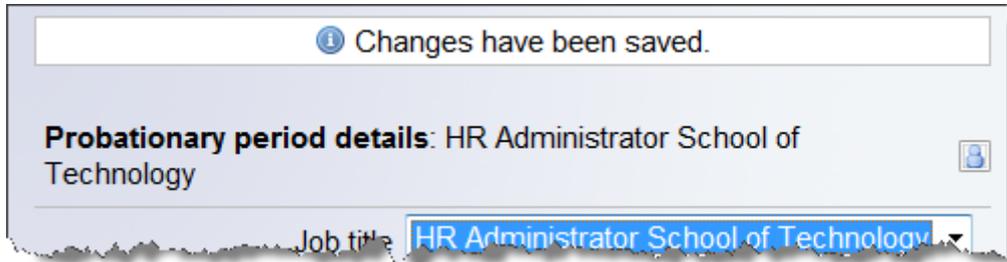


A screenshot of the "Probationary period details" form for "HR Administrator School of Technology". The form contains the following fields and controls:

- Job title: HR Administrator School of Technology (dropdown menu)
- Reason: New appointment (dropdown menu)
- Complete: (checkbox, circled in red)
- Start date: 23/09/2013 (text input with calendar icon)
- End date: 23/03/2014 (text input with calendar icon)
- Buttons: Save (green), Delete (red), New (blue)

8. Click on the  button.

9. A changes have been saved confirmation will appear at the top of the screen.



The person's appointment is now confirmed.
This will remove the person from any further reporting cycles.

1.3 Extending Probation

When it is necessary to extend a probationary period, firstly the new appointment probation must be ended (so that this doesn't continue to appear on the probation report) then a new probationary period needs to be created.

1. Use the search facility to locate and select the person whose details you wish to maintain.
2. Open the Employment menu and select Positions. Ensure the current position is selected. Select Probationary Period and Probationary Period Details.
3. Click the complete box and save as in the instructions above.

Probationary period details: HR Administrator School of Technology

Job title: HR Administrator School of Technology

Reason: New appointment

Complete:

Start date: 23/09/2013

End date: 23/03/2014

Buttons: Save, Delete, New

4. Click on the  button
5. The Probationary period details: New page will be displayed

Probationary period details: New

Job title: HR Administrator School of Technology

Reason: [Empty]

Complete:

Start date: [Empty]

End date: [Empty]

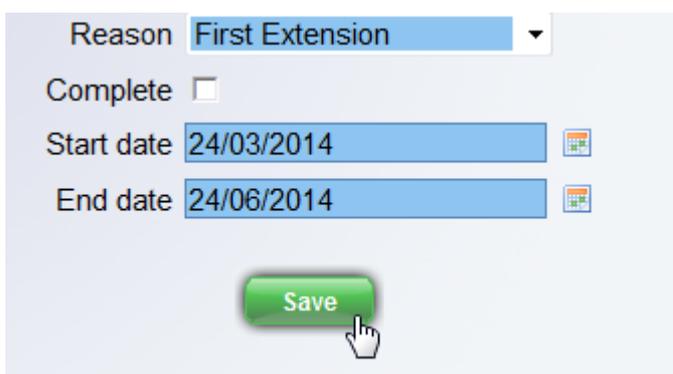
Button: Save

6. Click the drop down arrow and select the First Extension reason



A screenshot of a web form showing a dropdown menu for the 'Reason' field. The menu is open, displaying four options: 'Extension', 'First Extension', 'New appointment', and 'Termination Considered'. The 'First Extension' option is highlighted in blue. To the left of the dropdown, the labels 'Complete', 'Start date', and 'End date' are visible. To the right of the dropdown, there are two small calendar icons.

7. Do **not** tick the complete box.
8. Enter a start date that is one day later than the end date of the new appointment probationary period.
9. Enter the new probationary period end date.



A screenshot of the web form showing the 'Reason' dropdown set to 'First Extension'. The 'Complete' checkbox is unchecked. The 'Start date' field contains '24/03/2014' and the 'End date' field contains '24/06/2014'. Below the date fields is a green 'Save' button with a mouse cursor pointing to it.

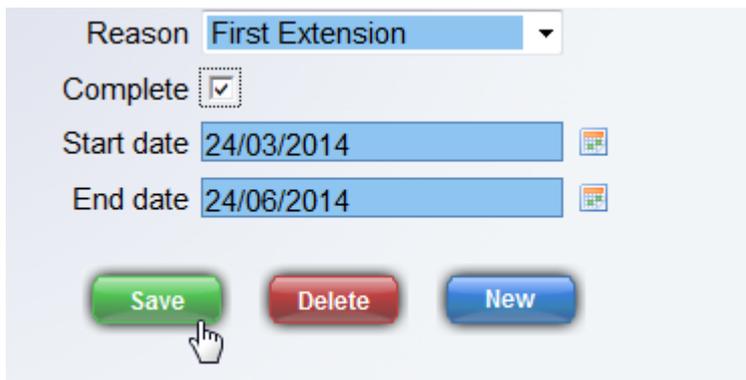
10. Click on the Save button.

11. Both the completed new appointment and the first extension probationary periods will appear in the object pane

Job title	Reason	Complete	Start date	End date
 HR Administrator School of Technology	New appointment	Yes	23/09/2013	23/03/2014
 HR Administrator School of Technology	First Extension	No	24/03/2014	24/06/2014

The start and end dates for the second probationary period should have been agreed by the department in consultation with the HR Adviser.

At the end of the extension period providing the probation has been completed successfully the first extension can be marked complete.



Reason **First Extension** ▼

Complete

Start date 

End date 

1.4 Termination Considered

Where termination is considered consult with your HRA or HRBM for advice and guidance.

1. Use the search facility to locate the person whose details you wish to maintain.
2. Open the Employment menu and select Positions. Ensure the current position is selected. Select Probationary Period and Probationary Period Details.
3. Select the last probationary period from the object pane (in this example the first extension record)

Job title	Reason	Complete
HR Administrator School of Technology	New appointment	Yes
HR Administrator School of Technology	First Extension	No

Expand/Collapse folders

- Probationary periods
 - Probationary period details
 - New - Probationary period details

4. Select probationary period details.

Job title	Reason	Complete
HR Administrator School of Technology	New appointment	Yes
HR Administrator School of Technology	First Extension	No

Expand/Collapse folders

- Probationary periods
 - Probationary period details
 - New - Probationary period details

Probationary period details: HR Administrator School of Technology

Job title: HR Administrator School of Technology

Reason: First Extension

Complete:

Start date: 24/03/2014

End date: 24/06/2014

- 5. Click the complete check box and Save

Changes have been saved.

Probationary period details: HR Administrator School of Technology

Job title: HR Administrator School of Technology

Reason: First Extension

Complete:

Start date: 24/03/2014

End date: 24/06/2014

Buttons: Save, Delete, New

- 6. Click on the  button
- 7. The Probationary period details: New page will be displayed. Click the drop down arrow and select the Termination considered reason.

Probationary period details: New

Job title: HR Administrator School of Technology

Reason: [Dropdown menu open]

Complete:

Start date: [Calendar icon]

End date: [Calendar icon]

Reason options: Extension, First Extension, New appointment, Reduced, Termination Considered

Buttons: Save

- 8. Do **not** tick the complete box

9. Enter a start date that is one day later than the end date of the previous probationary period.
10. Enter the probationary period end date.

Probationary period details: New 

Job title HR Administrator School of Technology ▼

Reason Termination Considered ▼

Complete

Start date 25/06/2014 

End date 31/08/2014 

11. Click on the Save button.
12. All three probationary periods will be displayed in the object pane.

Select all				
Job title	Reason	Complete	Start date	End date
 HR Administrator School of Technology	New appointment	Yes	23/09/2013	23/03/2014
 HR Administrator School of Technology	First Extension	Yes	24/03/2014	24/06/2014
 HR Administrator School of Technology	Termination Considered	No	25/06/2014	31/08/2014

Any cases of this type should be reported to the HR Adviser immediately.