

Probation Period

Employees work much better when they are clear on expectations. It is unreasonable to expect that a transition into a new role will go perfectly. People are a product of their previous environment, so what may have been common practice in another environment, may not be here at Cartridge Save.

The objective of a three/six-month probation review period is to keep communication flowing and address any concerns or training issues.

Introduction

All staff undergo a probationary period during which they will be introduced to their main duties and responsibilities and the standards expected of them.

During the probationary period the Manager will provide the necessary information and training that the individual will undertake. Managers must ensure processes are in place to support and monitor the employee's progress throughout the probationary period. Probationary periods are 3 months or 6 months depending on the nature of the role.

Responsibilities

The new employee's Manager will be responsible for managing the probationary period and Human Resources will attend a meeting where the probation is to be extended or terminated.

New employees have a responsibility to attend meetings held as part of the probation process.

Probation Procedure

A job description will be issued to the new employee outlining:

- their duties
- the required standard of performance
- how their performance will be assessed
- possible outcomes of not meeting the required standard

The Manager will be required to complete a review with the new employee during the first week, then more formal reviews at monthly intervals by completing the Probation Review Forms.

The First Meeting

The first meeting should take place at the end of week one of the new employee commencing employment. The purpose of the first meeting between the new employee and the line manager is to explain:

- Specific job/SMART objectives
- Skills and competencies that need to be developed
- Support to be provided
- Any training or development requirements



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- The standards of performance to be achieved
- Time frames for achievement

At the end of the meeting the review form should be uploaded into People HR for the employee to sign electronically.

The Second and Third Meeting

The purpose of these meetings is to undertake a review of the new employee's progress towards the objectives set in the First Meeting and their performance of the responsibilities documented in the job description for the role.

These meetings are an opportunity for the Manager to give feedback on performance to date, to acknowledge successes, and to discuss alternative strategies where objectives are not being met. The Manager must also provide adequate opportunity for the employee to explain how things are going and for the Manager to gain understanding of the situation from the employee's perspective with a view to clarifying and discussing any issues which emerge.

At the end of each meeting the relevant probation form should be uploaded into People HR for the employee to sign.

If there is a Problem with the Performance

During the probation period it is crucial that the Manager meets with HR immediately should they have concerns that the new employee may not successfully complete their probationary period.

The Manager should have a meeting with the employee to determine the cause of the problem. If the employee states workplace matters are affecting their performance, then the Manager should investigate/consider those factors and where it is reasonable and appropriate, steps should be taken.

The Final Assessment

The Manager should arrange a meeting with the employee to take place at the prearranged final assessment date. This date should not be later than the end of the 3/6 month probationary period. The employee should be informed of the meeting time, date and place.

The purpose of this meeting will be to carry out a final assessment of performance.

The meeting should focus on:

- achievement of objectives
- achievement of agreed standards and targets
- performance of the duties as outlined in the job description



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The outcome of the final assessment can be either:

1. The employee continued to perform to an acceptable standard
2. The previously recorded non-effective performance has been satisfactorily resolved, or;
3. The previously recorded non-effective performance has not improved

If the performance has not reached the expected standard, the Manager should, during the course of the review meeting, try to ascertain whether there has been any restrictions, such as:

- Failing to provide agreed training or support
- Insufficient support being made available

The Manager will discuss with HR whether extending the probationary period would enable the employee to reach the required level of performance. If it is considered appropriate, a meeting will be arranged with the employee to discuss the length of the extension, the acceptable standard that must be reached and any support that will be provided. The employee has the right to be accompanied to this meeting by a workplace colleague or union representative. The outcome of this meeting will be documented in a letter to the employee by HR.

If an extension to a probationary period is not appropriate or if an extension to the probationary period has not resulted in the necessary standard, the Manager will arrange a further meeting with HR in attendance. The employee has the right to be accompanied to this meeting by a workplace colleague or trade union representative.

The employee will be given the opportunity to provide an explanation and details of any mitigating circumstances.

The decision will be communicated to the new employee at the meeting followed by a letter confirming the decision from HR.

Appeals

New employees will have the right to appeal against a decision to terminate their employment for failure to satisfactorily complete their probation period. An appeal must be lodged in writing with HR within 5 working days of receipt of confirmation of termination.