Probation – Guidance for completion of Templates

The HR department have drafted a suite of templates that you can access and use to support you when managing a new starter on probation. This process is part of the Recruitment and Induction policy.

General Guidance

When using the template letters, you will need to ensure;

1. Click on the letter reference number below, of the template you wish to use, to open the template. **You should immediately save the letter to your G/drive or personal drive.**

2. Details in **bold** and *italics* or within a *[ ]* – you need to insert some specific details e.g. *[Date]* would mean that you need to insert the relevant date.

3. Anything that is highlighted means that you need to either chose one sentence/paragraph or another and then delete the highlighted text e.g. (*Delete as appropriate) means you need to decide which of the following sentences or paragraphs is the relevant one to use, the sections to consider will be pre-fixed with a '*'. Once you have chosen the relevant paragraphs delete other paragraphs that aren't relevant and ensure you take off the highlight colour from any words/sentences highlighted, to do this select the word or section highlighted then click on the icon:

4. You put your employee's full name (Forename and Surname) in the address details.

5. Once you have added in the relevant details and removed any sentences/paragraphs as appropriate, you should ensure that all the text is changed to normal text so take off any **'Bold'** or *'Italics'* e.g. any dates you have inserted should be made normal text so rather than '*10 September 2015'* you should make it '10 September 2015'. **NB. Consider how this is presented to the reader.**

6. You use either letter headed paper, or you insert the letter head details in the template letter when printing.

7. When organising dates and times for meetings you should discuss and agree these with your employee prior to confirming in writing. This will ensure that you are both free to attend on the date agreed.

Which template should I use for which meeting?

Each letter and checklist is numbered and a description provided to make it easier for you to identify the correct letter to use. You **must** ensure you use the **correct template** therefore if you are unsure of which one to use please refer to the details below;

Letter no. and link	Letter Name	When to use the letter
PRO1	**Probation review - CHECKLIST**	This document will cover the 1 and the 6-month review. It is designed to act as an aide memoir to the manager holding the review to ensure that you cover all bases. It is *not* designed for you to make notes on and it is not necessary for it to be signed. You should however make notes from the meeting and update the PDP with any concerns, actions, support you need to provide etc. Only the areas not greyed out are to be covered in the appropriate meeting.
PRO2	**Formal 1-month review - INVITE**	The 1-month review is a formal meeting, and therefore you will need to use **PR02** to invite your employee to the meeting. You are advised to have these dates diarised from the very start; however, you will still need to send a letter for this meeting. You can do this anytime following their start date.
PRO3	**Formal 1-month review - OUTCOME**	Following the review, use **PR03** to record your outcome and provide in writing within 7 calendar days of the meeting taking place. You should include in this outcome details of any areas of concern or risks that they should now focus on.
PR04	**Formal 6-month review - INVITE**	The 6-month review is a formal meeting, and therefore you will need to use **PR04** to invite your employee to the meeting. You are advised to have these dates diarised from the very start; however, you will still need to send a letter for this meeting. You can do this anytime following their 1-month formal review.
PRO5	**6 Month Review - OUTCOME**	Following a successful review at month 6, or an extension review, use PRO5 to confirm that the

		employee has passed their probation period or details of any extension or referral for contemplation of dismissal.
PR06	**Final Review Meeting - OUTCOME**	Following a Final Review Meeting, used PRO6 to confirm the outcome form the meeting. Should the employee be dismissed, ensure the manager has completed the termination process.