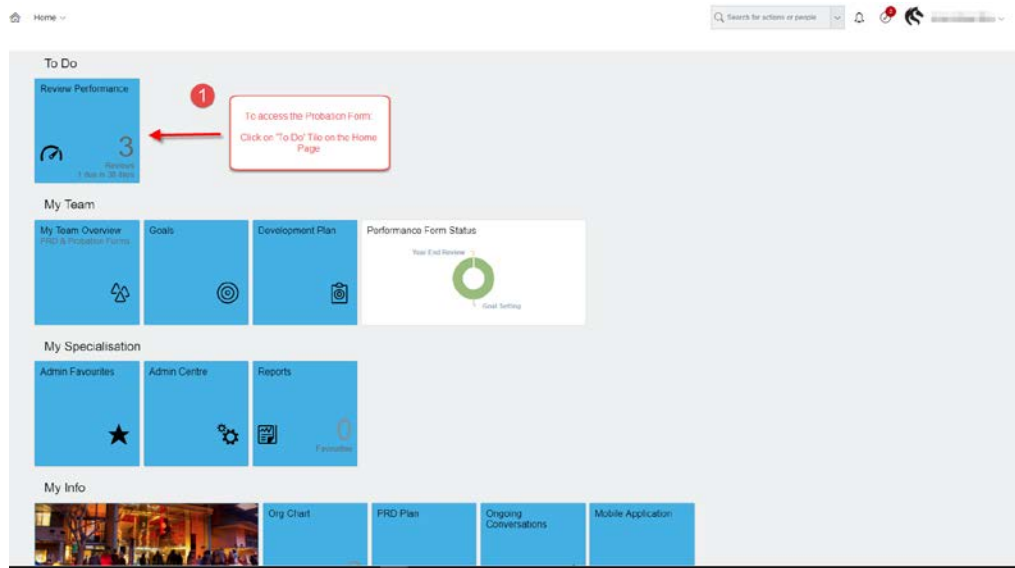
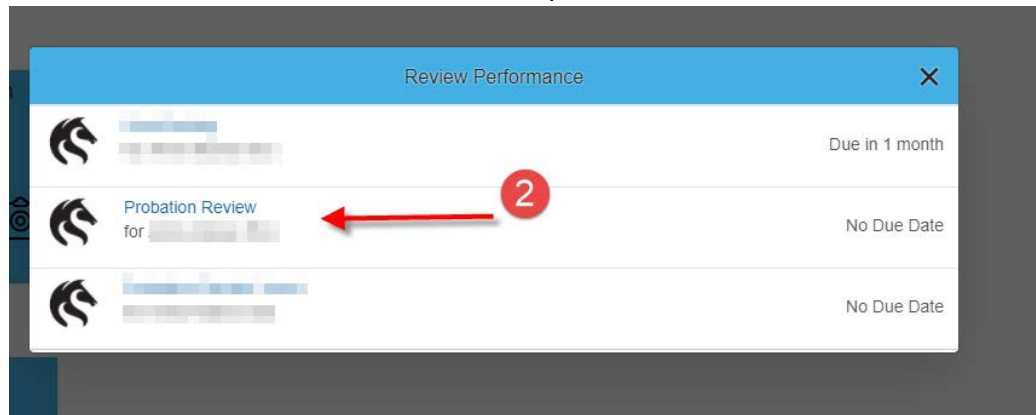


How to complete the Probation Form Quick Guide – Manager

1. Click on the To Do tile to access the Probation Form



2. Click on Probation Review to open the Probation Form



Please note that the Probation Due date can be found on the Probation Form.

Figure 1 Probation Form Layout-Manager View

The screenshot displays the 'Probation Form for [Employee Name]' interface. At the top, there is a navigation bar with a 'PRD Plan' dropdown, a 'Go to Home Page' button, and a search bar. The main header includes 'Back to: Team Overview' and 'Probation Form for [Employee Name]'. A red arrow points to a green triangle icon with the number '6' and the text 'Incomplete Items', with a callout box stating: 'Click on the green icon to access the quick links to complete the activities in this Form'. To the right, a 'Supporting' section shows '0' items. Below the header, a horizontal menu contains 'Route Map', 'Probation Form Instructions', 'Employee Information', 'Review Information', 'Activities to be completed during Probation', 'Employee's Performance of Duties', and 'More'. A red arrow points to the 'Route Map' link, with a callout box stating: 'The Route map shows the steps required to complete the Probation Form'. The 'Route Map' section shows a progress bar with three steps: '1 Probation Review' (with an 'Actions' link), '2 Employee Acknowledgement', and '3 Completed'. A red arrow points to the 'Actions' link, with a callout box stating: 'Click on Actions to find out the Actions required to complete the Form'. Below the route map is the 'Probation Form Instructions' section, which contains a paragraph of text and a 'Less' link.

PRD Plan
Go to Home Page

Search for actions or people

THE UNIVERSITY OF
NEWCASTLE
AUSTRALIA

Reviews Team Overview

Back to: Team Overview

Probation Form for [Employee Name]

Actions History

6
Incomplete Items

0 0
Supporting

Route Map Probation Form Instructions Employee Information Review Information Activities to be completed during Probation Employee's Performance of Duties More

Route Map

The Route map shows the steps required to complete the Probation Form

Assessment Completed

1 Probation Review 2 Employee Acknowledgement 3 Completed


Actions

Click on Actions to find out the Actions required to complete the Form

Probation Form Instructions

Your probation is directly related to your work as defined by the position description, UON classification descriptors and compliance with UON Policies and Code of Conduct. This form will assist in capturing probationary requirements and support the ongoing and regular assessment before the final review and recommendation is made by your manager.

Less


- Click on the  icon to view the list of activities you are required to complete on the Form. Click on the activity if you want to go straight to that activity in the Form

Home PRD Plan ▾

Reviews Team Overview

Back to: Inbox

Probation Form for [Redacted]

 6 Incomplete Items 3

Route Map Probation Form Instructions

Route Map

1 Probation Review ⓘ

Actions

Incomplete Items

Activities to be completed during Probation	
Employee's Performance of Duties	1
Employee's Conduct	1
Manager Recommendation	3

- The Probation End Date is the Due Date of the Review Period

Employee Information

First Name	[Redacted]	Last Name	[Redacted]
Manager	[Redacted]	Position Title	Business Analyst
School/Unit	Information Technology	Location	Callaghan Campus
Faculty/Division	Resources Division	Role Appointment Date	11/07/2016

Review Information

Originator: HR Client Services

Review Period: 21/03/2018 - 19/09/2018

Due Date: 19/09/2018

4

The Due Date is the Probation End Date

5. Links are provided so the manager and the employee can easily access Discover or access information about the University Leadership Frameworks

Choose the links that are relevant to the employee's Probation. The system will open the link to [Discover](#) to complete the activities or the UON Website to access the Performance Framework documents

6. The employee or the Manager can click on the checkbox's to indicate that the activities relevant to their probation have been completed.
7. Add your comments about how the employee is tracking with their probation activities.

Please note - Information you enter into the comments area can be viewed by your manager

Activities to be completed during Probation

Tick the relevant checkboxes below when you have completed the probation activities. Links to the documents are provided below:

[Discover Record of Learning](#)

[UON Health and Safety Induction Certification in Discover](#)

[UONboard Orientation program in Discover](#)

[Successfully completed 'Teaching Essentials – Orientation program' in Discover](#) (Academic employees only)

[UON Leadership Framework](#)

Performance Expectation Framework (PEF) for [Academic](#) and [Professional](#) staff

- ☐ UON Health and Safety Induction
- ☐ UONboard Induction in Discover
- ☐ Successfully complete 'Teaching Essentials at Newcastle'
- ☐ Understand the Performance Expectations Framework
- ☐ Understand the UON Leadership Framework

Employee - Comments on Activities

* Manager - Comments on Activities

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8. Add comments about how you feel the employee is performing their duties

Employee's Performance of Duties

You are expected to meet the role requirements as outlined in the position description and UON Performance Expectations Framework for Academic and Professionals as applicable to the level of appointment.

Employee - Comments on Performance

* Manager - Comments on Performance

8

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9. Add comments about how you feel the employee is conducting themselves and how they are demonstrating expected behaviours.

Employee's Conduct

Employees are expected to role model UON's Code of Conduct and Leadership Framework as per expected behaviours of the role level. Staff are to abide by and promote compliance with the policies, rules and procedures of the University.

The employee is to demonstrate their understanding of UON Behaviours as per the [Code of Conduct](#)

- Honesty
- Fairness
- Trust
- Accountability
- Respect

and the [Leadership Framework](#)

- Shape the Future
- Engage Beyond University
- Work Collaboratively
- Strive for Excellence
- Drive Performance
- Show Respect and Courage

Employee - Comments on Conduct

* Manager - Comments on Conduct

9

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Manager Recommendation

Prior to the end of the Probation Period the manager should schedule a meeting to discuss the end of probation recommendation.

10. Click on the enterprise agreements link to review the timeframes that must be followed in relation to the Probation Process.

Note - If the end of probation recommendation is to extend or terminate employee a HR Business Partner must be consulted prior to discussion with the employee

11. Select the appropriate Recommendation from the drop down list

12. Add comments for the employee about the outcome of the probation and the employees performance

13. If the recommendation is to extend, and the new probation end date is known, please enter the end date in the Extension Date field.

14. Click on the **Send to the Employee for Acknowledgement** button to workflow the Probation Form to the employee.

Manager Recommendation

The probationary clauses of the [enterprise agreements](#) set out specific actions and timeframes that must be followed.

- Please ensure that you have read the relevant probationary clause and consult with your Human Resources Business Partner or Employee Relations if you have any question or concerns about the process.
- Consulting your Business Partner is mandatory if you intend to recommend the extension of probation or termination of employment.

After your recommendation is submitted, this report will be forwarded to the employee for acknowledgement.

[Less](#)

11

☐ * This is a required field. The form will not route if it is empty.

* Recommendation

12

Confirmation of appointment

Extension of probation

Termination of appointment

Size

Extension date if applicable

DD/MM/YYYY

13

14

Cancel

Save and Close

Send to Employee for Acknowledgement

15. There is an optional comments box. If comments are entered, these comments will appear in the email notification to the employee.

16. Click on **the Send to Employee for Acknowledgement** button

The employee is required to access the Probation Form and acknowledge the recommendation and outcome at the end of the probation period.

Send to Employee for Acknowledgement ⓘ

You are about to send this form to the next person(s) specified in the workflow.

Forward Form to Anne-Maree Box

Email Notification Comments

15

16

Cancel & Return to Form Send to Employee for Acknowledgement