

# PROBATION SCHEME



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## Introduction

This document sets out the terms and structure of Reading Borough Council's Probation Scheme. Where the Scheme is applied to a new member of staff it forms part of the contract of employment.

Use of the Probation Scheme does not mean that other procedures/agreements available to managers and staff (eg disciplinary and grievance procedures) cannot be used.

This scheme is introduced (and will apply to employment contracts) with effect from 1 January 2017.

## Why does Reading Borough Council have a probationary period?

The core purpose of a probationary period is to ensure that the manager and the employee have an opportunity to assess and review performance and development needs during the initial six months of employment. The Probation Scheme provides a framework within which this can take place.

It must be noted that it is not necessary to assess an employee's suitability to do all the duties and responsibilities (as outlined in the job description and person specification) of the post. In many cases competency may take more than 6 months to ascertain.

The Probation Scheme is an additional mechanism and not a replacement for normal good management practice. This means that other ways of communicating and discussion, such as team meetings, 'one to one' supervision etc, should still be used. Records of other forms of supervision and communication should be kept and circulated in the normal way.

The Probation Scheme is directly linked to a structured induction programme (including health and safety) and an assessment of training and development needs.

Probation should be undertaken and applied in a fair and consistent manner and the outcome of this process is the confirmation, or not, of employment with Reading Borough Council.

## Who is covered by the Probation Scheme?

All new employees to Reading Borough Council, except teachers, are covered by the Probation Scheme. Information about [fixed term and casual contracts](#) can be found below.

## What about existing employees?

The Probation Scheme is not designed to apply to existing Reading Borough Council staff who transfer from one post to another within the Council.

However, it may be desirable to apply the terms of the Scheme to employees who apply through the normal recruitment and selection process for a second post (that is, an additional post to their substantive post). Before coming to this decision, the appointing manager will need to consider the role and contents of the new job when compared with the postholder's existing job. If they are broadly similar (ie skills, experience, levels of responsibility, same directorate) then it may not be necessary to apply the Scheme to the appointment.

If, however, the second post is significantly different, then it may be appropriate to apply the terms of the Scheme so that the employee and manager can be confident that the work can be successfully undertaken and that the relevant and appropriate level of support can be given.

It may be that not all elements of the Scheme need to be applied, for example, it may not be necessary for a full induction to the Council, although if the second post is in another directorate it would be preferable to have a local induction.

If it is decided that a period of probation is not needed for a second (additional) post, then this decision should be approved by the relevant Head of Service. A note of the reasons why this decision was taken should be sent to HR to be held on the employee's personal file.

Where existing employees apply for a new post, the principles of the probation scheme (define objectives and standards, provide support and review progress) should be used.

## What about apprentices, staff on fixed term or on casual contracts?

Apprentices are subject to a probationary period and must maintain regular attendance at college in order to be confirmed in post.

Whether the Scheme will be applied to staff on **fixed term** contracts of employment will depend on the operational/business reasons for the fixed term contract. However, there should not be a general presumption that staff on fixed term contracts are exempt from this Scheme.

This Scheme will **not normally** be applied to staff who hold casual contracts of employment, volunteers or to staff on trainee schemes. This does not mean that such staff will not receive support or other forms of assessment. Managers should demonstrate good management practice.

## How long does the probationary period last?

The probationary period lasts for a maximum of six months. The requirement to complete a probationary period will only be waived upon the authorisation of the relevant Head of Service. Such a decision will be the subject of consultation with the relevant member of the JTUC before it is confirmed. If this happens then a record of the decision will be sent to HR to be retained on the employee's personal file.

The decision to appoint on a permanent basis is made at the end of the probationary period subject to completion of a satisfactory probationary period.

## Can the probationary period be extended?

The probation period will only be extended in exceptional circumstances and with joint agreement between the manager and the employee. It is not anticipated that such extensions will be for a period exceeding 2 months at any one time.

If an extension is necessary, the manager and employee should meet to discuss the possibility of extending the period of probationary employment and the following should be recorded:

- Length of the extension
- Date the extension will end
- Reason for the extension including details of support which will be available, eg training, during the extension period

The employee must be told that if the required standards are not attained by the end of the extension, the contract may be terminated.

## Why would it be necessary to extend the probationary period?

If there are aspects of work that the manager is not satisfied with but feels can be achieved, there have been delays in training being available or the employee has been on sick leave, probation may be extended for a maximum of two months.

## Roles and Responsibilities

### a) Managers

It is the responsibility of the manager to ensure:

- All new employees know what is expected during probation

- There are at no less than four probationary review meetings. The recommended intervals are on [page 8](#).
- All reasonable steps are taken to allow the employee to meet the expected work and behaviour standards.
- Written records of progress through the probationary period are maintained and held confidentially.
- Copies of completed probationary report forms are sent to Human Resources to add to the employee's personal file. All copies of correspondence relating to the Scheme, such as letters of termination, will also be kept on the employee's personal file.

## b) Employees

It is the responsibility of the employee to:

- Take an active part in the probationary review process
- Take some responsibility for ensuring probationary review meetings are undertaken and recorded
- Make use of any formal or informal support provided by the Council
- Raise and seek action to resolve issues.

The employee should be given copies of all documentation relevant to the Scheme including notes of the review meetings, 'one to one' supervision notes and notes of training and development discussions.

## How does the Probation Scheme work?

Regular probationary review meetings must be carried out during the six months' probationary period. They provide a framework for discussion and recording development needs. The meetings must be recorded and the probationary report forms are evidence of the discussions and agreed ways forward.

## Why have Probationary Review Meetings?

The purpose of probationary review meetings is to ensure that the identified objectives are achieved and establish training and development needs during the course of the probationary period, as well as to monitor progress. The job description and person specification should be used as a guide.

If any issues arise during the normal course of employment, they should be dealt with immediately and not left until a formal probationary review meeting.

Any objectives set during the probation period should relate to the **duties of the post**, the **person specification** as well as the **core elements** shown below.

Objectives should be realistic, important for the job and be jointly agreed between the manager and the employee. Objectives should cover work performance, behaviour and initial training and development needs (which will include an induction programme) and should be clearly established and recorded at the beginning.

### How are objectives set?

The assessment process is designed to ensure that newly appointed staff have the best opportunity to meet the requirements of the post as quickly as possible and the core elements (see below) must be monitored during the probationary period.

**The manager does not need to set standards under every heading - it should only be done if they are relevant or necessary.**

Before a new employee starts, the manager should identify standards that are considered reasonable and appropriate to apply to a newly appointed member of staff. These standards could range from specific performance targets (for example, timekeeping) through to making sure that the employee is introduced to relevant policies and procedures and is aware of them and understands them (and their relevance to the employee's work).

There is no 'one size fits all' approach and the standards set will vary depending on work location, type and seniority of the post/role.

### Core Elements of the Probation Scheme

The core areas being measured during the probationary period are:

- **Basic standard of work** - meeting deadline targets, general presentation, accuracy, identify general work standards.
- **Initiative** - does the employee apply (or demonstrate the potential to apply) initiative required to the level required by the person specification? It is unlikely that a newly appointed employee, except in a senior management position, will be expected to work with little or no supervision in the first few weeks.
- **Relationships** - has the employee developed positive working relationships with workplace colleagues and clients (and any external partners/clients)? There may be 'norms' of behaviour in the work location that the employee needs to know and demonstrate.

- **Customer service** - does the employee provide adequate levels of customer service to internal and external clients?
- **Attendance and timekeeping** - has the employee established reasonable levels of attendance and good timekeeping? This should include discussions about flexitime arrangements (where relevant) as well as what to do in the event of sickness. It is important that the standards set are consistent with 'custom and practice' in the section. Any sickness absence needs to be addressed during probation, but should not automatically be a reason for deciding that the employee has 'not met' the overall standards set.
- **Equality and Diversity** - does the employee show an awareness of the Council's equality statement and how it can be applied in the day to day working environment? Corporate and local policies and procedures relating to equality and diversity should be introduced, as well as any expected standards of behaviour.

There may be other core elements of the job/standards of performance that the manager feels are important. These should form part of the probationary review process in addition to those above.

### **How often should probationary review meetings take place?**

Probationary review meetings should be held:

- **At the start of employment** (within the first 5 working days) (Social Workers in Children's Teams would have this review meeting at the end of the first week in the team)
- **One month** following appointment
- **3 months** following appointment
- **5 months** following appointment

Probation Report Forms to record the outcomes of probationary review meetings are attached and provide a framework for the discussions.

### **Probation Report Forms**

The probation report forms provide a template for recording discussions and outcomes. Managers are strongly advised to use them or, alternatively, to develop their own.



The forms should provide:

- Evidence that probation review meetings have taken place
- Clearly defined improvement targets and objectives
- Details of any issues causing concern
- Evidence of any support, guidance and training provided
- Evidence that the employee has been given an opportunity to improve
- The employee's comments

A copy of the forms should be kept by the employee, line manager and Human Resources.

The manager should provide regular feedback to the employee about performance and progress, not just during probationary meetings. The manager is also responsible for providing guidance and support and for identifying any training needs.

### **First Probationary Review Meeting**

The manager and employee should, at the First Probationary Meeting establish, agree and record the following:

- **A programme of induction**
- **The standards of behaviour** expected under the 'Core' elements above
- **Any further performance outcomes** that will be used as part of the probationary review (see above)
- **An initial assessment of training** and development needs; this may include using coaching or mentoring
- **A programme of future review meetings**

### **Second and Third Probationary Review Meetings**

At the **second** and **third** probationary review meetings, the manager and employee should:

- Review what has happened and look ahead to what still needs to be achieved.
- Review progress to date in achieving agreed objectives using the record from the first meeting as the starting point.
- Note where standards and targets have not been met and agree further action to assist the employee to meet these objectives

- Discuss, agree and record any future training and development needs.

The manager should give an overall assessment of the employee's progress, ranking it as either '**Objectives Met**' or '**Objectives Not Met**'.

If overall performance is assessed as 'Not Met' the manager should remind the employee that completion of a satisfactory period of probation under this Scheme is required before the appointment is confirmed either as permanent or fixed term. The consequences of not successfully completing the probationary period could be termination of employment.

In addition, at the **third** (ie 3 month) probationary review meeting, if the manager thinks the overall assessment of the employee's performance is '**Not Met**', the manager shall also write to the employee to:

- confirm this assessment
- remind the employee of the fact that continued employment is conditional upon the successful completion of the probationary period
- remind the employee that if unsuccessful, this could result in the termination of the employee's employment.

The letter will also set out:

- where improvement is needed
- the level of improvement required
- details of any assistance that is being given to the employee to achieve these requirements

#### **Fourth Probationary Review Meeting**

If the overall performance is assessed as '**Objectives Met**', the manager will recommend to the Head of Service\* that the employee's employment be confirmed as permanent.

If overall performance is assessed as '**Objectives Not Met**', the manager will recommend to the Head of Service\* that the employee's employment will not be confirmed as permanent.

\*'Head of Service' is a senior manager who has authority to suspend and dismiss staff.

## **What happens if the manager makes a recommendation not to appoint?**

The recommendation to the Head of Service should take place no later than 6 months after the employee started work.

The Head of Service will convene a meeting with the employee and the manager to consider the recommendation and any explanation/representation that the employee may wish to make.

**This meeting should take place within 10 working days of the meeting where the verbal notification was given to the employee (unless there are exceptional\* circumstances).**

\*'Exceptional' in this context means that the Head of Service is unavoidably unavailable or that the employee and/or representative needs time to prepare for such a meeting. The extension will not be for more than a maximum of 2 to 3 working days.

The absence or unavailability of an employee to attend a meeting will not unreasonably delay holding a meeting or reaching a decision on the matter by the Head of Service.

At the meeting, the Head of Service will consider the written/verbal representations from the employee/representative and the manager and decide whether to uphold or reject the recommendation of the manager. This decision will be made within 5 working days and a letter confirming the decision will be sent to the employee

The Head of Service's decision is final.

The employee's contract of employment will be terminated with notice with effect from the date of the decision of the Head of Service not to appoint on a permanent basis.

## **Can the employee appeal against the decision not to appoint?**

If the employee is unhappy with a decision not to confirm the appointment and to terminate employment, the employee may seek a review of this decision by another Head of Service. The request must be lodged in writing to the Head of Service who made the decision within **5 working days** of the decision not to appoint/terminate being notified to the employee.

The request for a review must give details of the grounds for the review and refer to the reasons set out in the letter confirming termination.

The review shall normally be conducted and completed within **15 working days** of receipt of the request from the employee. Written and/or verbal

submissions from the employee, as well as the manager involved in the probationary review process and the decision not to confirm the appointment as permanent, will be sought. In the event of verbal submissions being made by the employee, a union representative, workplace colleague or friend may represent the employee.

There is no further right of review once this process is completed and the decision given.

### **Termination of employment before 6 months**

The Scheme allows for the possibility that employment may be terminated before the end of the normal probationary review period, but that decision would be exceptional and not the norm. In the event that such a decision is made, the arrangements for recommendation to the Head of Service (and possible review of a decision to terminate) will be those set out above.

The decision will not be made unless the employee has been told of areas that need improvement, has been given a reasonable opportunity to improve and the relevant local trades union representative has been formally consulted. Before coming to the decision, the manager should also consider the possibility of a move to other duties.

There may be circumstances where an employee has been absent which has resulted in delays to assessment during the probationary period. These absences should be dealt with and managed by using the **principles** of the [Capability \(Ill Health\)](#) procedure, if health related, (attendance is a factor to be assessed under the Probation Scheme). If the absence of the employee would unreasonably delay the application of the Probation Scheme, the Scheme allows for the possibility of termination of employment before all the suggested review stages have been completed. If the employee has taken unauthorised absence from work, following any informal discussions with the employee, the disciplinary procedure may be considered.

Any possibility of the decision to terminate the contract of employment before the full probationary review has been completed should be dealt with reasonably and after discussion with the HR contact. The decision-making process/review applied should be the same as for any other form of termination set out in the Scheme (see above).

### **What exceptional circumstances could end employment before 6 months?**

- Other contractual procedures are applied (for example, disciplinary procedure)

- The performance of the employee is so poor that an early termination of the probationary period (and therefore employment itself) is necessary. The manager must consider if performance is unlikely to improve sufficiently even with further training and management intervention. The provisions of this Scheme relating to the decision not to confirm an appointment (and any review of such a decision) will still apply.
- Where the unavailability of the employee would unreasonably delay the application of this Scheme

### **What happens if the Probation Scheme is not used?**

In the event that probationary review meetings are not carried out, there is an assumption within the Scheme that the employee's appointment will be confirmed at the end of the probationary period, unless, of course, there is an agreed extension to the time periods.

### **Representation at Meetings**

It is anticipated that discussions of work performance under this Scheme will generally take place between the manager and the employee and that it is not appropriate for other parties to become involved in this process.

However, it is recognised that at key points in the application of the Scheme that there may be the need to involve other representatives or professional advisors (for example, Occupational Health, if appropriate). **It is not a right, but will not be unreasonably refused.** Each request will need to be judged on its merits and the reasons put forward by the employee/trades union. The following is allowed for under the Scheme.

The employee may be accompanied by a trades union representative or workplace colleague at the following points in the application of this Scheme -

- (a) At any meeting which is held which may lead to a decision not to permanently appoint an employee.
- (b) At meetings held to review decisions not to permanently appoint an employee.
- (c) At meetings held to discuss the possibility of extending the period of probationary employment under the Scheme.



## Probation Report Form

### First Probation Meeting

Name of Employee \_\_\_\_\_ Date of Interview \_\_\_\_\_  
Job Title \_\_\_\_\_  
Interviewing Manager \_\_\_\_\_  
Dept/Section \_\_\_\_\_

Please refer to the [Workplace Induction checklist](#)

Have you introduced the employee to the **Corporate Values** and discussed how they are applied within the team/section/dept?

Have you discussed and agreed an **induction programme**? Has the employee completed the on-line **Corporate Induction and Practice Standards** training? These are to be undertaken on [Learning Pool](#). A guide to setting up a User account is provided [here](#). (These should be completed within the first week of employment)

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*

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The purpose of the first meeting is to discuss and agree **levels of performance** for the following core areas? Please note any key points under each heading or attach to this report form. (Targets should be specific and measurable and be monitored throughout the probation period and demonstrate progression of suitability and competence)

### **Core Standards of Work**

### **Personal Responsibility and Initiative**

### **Relationships with Colleagues**

### **Customer Service**

### **Attendance and Timekeeping**

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*



## Equality and Diversity

**Other Service Standards** - make a note of other targets or standards relevant to this post that you have agreed should form part of the probation review process. (These should be standards that are specifically linked to your service)

**(NB - For Children's Social Work staff please refer to the General Directorate General Practice Standards and '6 obsessions' at ....links to be attached)**

**Training and Development Needs** - have you made an initial assessment of the training and development needs required by the employee? If so make a note of these below or attach to this report. *(Note: It may be that you and the employee want to spend more time considering this aspect and come back to it at the next meeting).*

**Future Review Meeting Arrangements** - under the RBC Probation Scheme you should have a series of formal meetings during the course of the probation period. Agree these now and make a note of them below.

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*

*Adult Social Care staff only - Please state whether staff member has been given a Care Certificate Workbook and the Skills for Care Code of Conduct*  
Yes/No

Manager's signature \_\_\_\_\_

Employee's signature \_\_\_\_\_

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*



## Probation Report Form

### Second Probation Meeting

Name of Employee \_\_\_\_\_ Date of Interview \_\_\_\_\_

Job Title \_\_\_\_\_

Interviewing Manager \_\_\_\_\_

Dept/Section \_\_\_\_\_

Has the employee completed their **induction programme**? If 'no' what else is there to cover? Ensure that the required on-line Corporate Induction and Practice Standards have been completed to a satisfactory level.

***Adult Social Care staff only***- Please state progress on completing Care Certificate workbook and whether member of staff has read and understood the Skills for Care Code of Conduct

Looking back at the standards established at the initial meeting, briefly describe whether the employee is meeting the agreed objectives for each of the 'core elements. Make a note of any area where these objectives are not being achieved.

#### Core Standards of Work

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*

Personal Responsibility and Initiative

Relationships with Colleagues

Customer Service

Attendance and Timekeeping

Equality and Diversity

Other Service Standards

(NB - For Children's Social Work staff please refer to the Directorate General Practice Standards and '6 obsessions' at ....links to be attached)

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*

**Training and Development Needs** – Have you made a joint assessment of the training or other development needs required by the employee? Please make a note of these below or attach a separate sheet.

**Overall Assessment of Performance**

How do you rate the overall performance of the employee since they started?

I regard the requirements/work objectives agreed to date as \_\_\_\_\_ - Met/Not Met\*

*(If the on-line corporate induction and practice standards have not been completed then staff have "Not Met" the performance standard)*

*(\*Please see page 11 onwards in the event of this ranking)*

If you marked overall performance as 'Not Met' please note below your reasons for this assessment (ie the key reasons why this assessment was made) *or attach a separate sheet.*

Comments by employer (or attach separate sheet)

Comments by Employee (or attach separate sheet)

Manager's signature \_\_\_\_\_

Employee's signature \_\_\_\_\_

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*



## Probation Report Form

### Third Probation Meeting

Name of Employee \_\_\_\_\_ Date of Interview \_\_\_\_\_

Job Title \_\_\_\_\_

Interviewing Manager \_\_\_\_\_

Dept/Section \_\_\_\_\_

Has the employee completed their induction programme? If 'no' what else is there to cover? Ensure that the required on-line Corporate Induction and Practice Standards have been completed to a satisfactory level.

**Adult Social Care staff only-** Please state whether member of staff has completed Care Certificate workbook or progress made to date and read and understood the Skills for Care Code of Conduct

Looking back at the standards established at the initial meeting, briefly describe whether the employee is meeting the agreed objectives for each of the 'core elements. Make a note of any area where these objectives are not being achieved.

#### Core Standards of Work

#### Personal Responsibility and Initiative

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*

Relationships with Colleagues

Customer Service

Attendance and Timekeeping

Equality and Diversity

Other Service Standards

(NB - For Children's Social Work staff please refer to the General Directorate General Practice Standards and '6 obsessions' at ...links to be attached)

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*

**Training and Development Needs** - Make a note here of progress in meeting any training and development targets/objectives.

## Overall Assessment of Performance

How do you rate the overall performance of the employee since they started?

I regard the requirements/work objectives agreed to date as - Met/Not Met\*

*(If the online corporate induction and practice standards have not been completed then staff have "Not Met" the performance - Not Met\* standard)*

*(\*Please see page 11 onwards in the event of this ranking)*

If you marked overall performance as 'Not Met' please note below your reasons for this assessment (ie the key reasons why this assessment was made) *or attach a separate sheet.*

Comments by employer *(or attach separate sheet)*

Comments by employee (or attach separate sheet)

Manager's signature \_\_\_\_\_

Employee's signature \_\_\_\_\_

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*





## Probation Report Form

### Fourth/Final Probation Meeting

Name of Employee \_\_\_\_\_ Date of Interview \_\_\_\_\_

Job Title \_\_\_\_\_

Interviewing Manager \_\_\_\_\_

Dept/Section \_\_\_\_\_

Looking back at the standards established at the initial meeting, briefly describe whether the employee is meeting the agreed objectives for each of the 'core elements. Make a note of any area where these objectives are not being achieved.

#### Basic Standards of Work

#### Personal Responsibility and Initiative

#### Relationships with Colleagues

#### Customer Service

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*

## Equality and Diversity

### Other Service Standards

(NB - For Children's Social Work staff please refer to the General Directorate General Practice Standards and '6 obsessions' at .....links to be attached)

**Training and Development Needs** - Make a note here of progress in meeting any training and development targets/objectives.

### Overall Assessment of Performance

How do you rate the overall performance of the employee since they started?

**Adult Social Care staff only**- Has the employee completed the Care Certificate Workbook? (Please note - The probation period should not be signed off as successfully completed if the employee has not completed the workbook and therefore has 'not met' the probation requirements). ASC staff should also have read and understood the Skills for Care Code of Conduct and a declaration signed.

**All Staff - Induction and Practice Standards should have been fully completed.** The probation period should not be signed off as successfully completed if the on-line training requirements have not been met.

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*

I regard the requirements/work objectives agreed to date as - Met  
Not Met\*

(\*Please see page 11 onwards in the event of this ranking)

***Are you recommending to the Head of Service that employment be confirmed?***

Yes No

Manager's signature \_\_\_\_\_

Employee's signature \_\_\_\_\_

### **For Completion by Head of Service**

I confirm that I have considered the recommendation by the above manager and that the period of probation -

- **has been** successfully completed and that employment should be confirmed.

Or

- **has not** been successfully completed and employment should not be confirmed\*

*(in the event that the line manager's recommendation is that employment is not to be confirmed, please see page 11 before completing this part of the Report form)*

Signed \_\_\_\_\_

Date \_\_\_\_\_

Job Title \_\_\_\_\_

*Copies of this form (and any relevant attachments) should be sent to your HR team once completed for inclusion in the employee's personal file. A copy should also be given to the employee.*