Contents

About This Document

owner	HR
access & use	Restricted to Managers & HR
what it is	A guide that: • Provides guidelines and best practices for managers overseeing the probationary period of new employees • Outlines the step-by-step process for managing the probationary period • Provides point-and-click access to the documents needed for each step, along with instructions and examples
who uses it	HR and Managers with direct reports

Note: This document includes sensitive information. It should not be shared with staff members who do not have responsibility for direct reports. Use caution and discretion when using or printing.

Document #: **PP-MGR-3100-S-1.0**

Document Owner: HR

Last Updated: <insert date>

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Note: The **Doc ID** column contains a unique identifier for all our HR documents. Think of it like a bar code you don't have to pay attention to, unless you want to double-check you have the right document.

Doc ID	Document Name	Description	Doc	Help	Ex.
PO-MGR-3105-R	Performance Management Overview Guide	Guide for managers with direct reports. Provides overview information and guidelines regarding performance management	🗎		
JE-ALL-3530-M.	Job Description Form	Form template for creating consistently structured job descriptions	🗎	？	👁
PP-MGR-3110-M.	Probationary Period Review Form	Form template for defining position success factors and setting performance expectations for new or transferred employees	🗎	？	
JE-ALL-3510-R.	List of Competencies	Guide that provides a 'menu' of categorized behavioral competencies and success traits	🗎		
JE-ALL-3520-M.	Job Procedures Form	Form template for capturing and recording the responsibilities and tasks required for a position, and how they are done	🗎	？	👁
PP-MGR-3120-M.	Probation Completion Letter	Letter template for Managers to provide formal, written confirmation of successful completion of a probationary period	🗎	？	
PP-MGR-3130-M.	Probation Extension Letter	Letter template for Managers to provide formal, written notification of probationary period extension	🗎	？	
PP-MGR-3140-M.	Extended Probation Completion Letter	Letter template for Managers to provide formal, written confirmation of successful completion of a probationary period that had been extended	🗎	？	

Guidelines & Steps

Step 1. Prepare for the Probationary Period

Managing performance and the probationary period begins before an employee begins a new position.

The steps below are normally completed in preparation for opening a new position. They're described in detail in the **Opening a New Position** section of the *OP-ALL-2410-S. Process Guide for Staff – Open & Advertising a Position* document, and summarized for quick reference below.

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3. When the new employee starts, make sure they understand the expectations for the position. Review the following documents and give them a copy of each:

   • *JE-ALL-3530-M. Job Description Form*

   • *Probationary Period Review Form*

   • *JE-ALL-3520-M. Job Procedures Form* (if available)

4. Clarify your expectations for the probationary period with respect to:

   • Quantity of work. Give examples of what successful employees in the same or a similar position have produced.

   • Quality of work. What's ok, what's not ok.

   • Quantity vs. quality. When to sacrifice one for the other.

5. Identify any immediate training requirements required for success during the probationary period.

6. Set concrete, measurable objectives for the probationary period.

Step 3. Manage Performance

❯❯ MANAGER

   • Position *Job Description Form*

   • Position *Probationary Period Review Form*

   • *Performance Management Overview Guide* for guidance on principles and best practices

2. Book monthly review meetings with the new employee to keep communication flowing and address concerns, training or accountability issues as they come up. Allow at least 30-45 minutes for each meeting. At each meeting:

   • Discuss the employee's view of the role now vs. their earlier perception.

   • Invite the employee to talk about their role, any issues they may have, and improvements they have made.

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OPTION 1 – Complete the Probationary Period

If the new employee has met performance expectations and successfully achieved the performance objectives during the Probationary Period, notify HR, mark the event with a review meeting and formalize it by letter.

❯❯ MANAGER

2. Meet with the employee (in person) before the end of the probationary period to congratulate them on successful completion and reinforce why it was successful. Be sure to:

   a. Reinforce areas where the employee has excelled.

   b. Suggest areas of further development.

   c. Set goals for the period leading up to the next annual performance review cycle.

   d. Invite the employee to share how you can best support him/her in the position.

3. During the meeting:

   a. Review the following final documents with the employee and provide them with a copy of each:

      ▪ Completed *Probationary Period Review Form*

      ▪ Personalized *Probation Completion Letter*

      Do not provide these documents to the employee without an in-person discussion.

   b. Have the employee sign 2 copies of the form and 2 copies of the letter, and keep 1 copy of each.

   c. Evaluate the employee's performance, provide feedback, and set goals for the period up to the next formal performance review.

4. Scan the signed *Probation Completion Letter* and email it to HR. Save an electronic copy for yourself.

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OPTION 3 – Terminate Employment

❯❯ HR ❯❯ MANAGER

If a new employee has not met expectations and there's no indication that they will if given more direction and time, the manager and HR may decide to terminate employment.   If this is the decision taken, follow the steps outlined in the *IT-MGR-3210-S. Process Guide for Managers – Involuntary Terminations*.