

Probation Framework – Manager Checklist

A positive start in a new role makes a real difference. While recruitment helps us appoint the right people, onboarding is what helps them settle in well, understand what's expected, and feel supported to succeed. The four-month probationary period is designed to help you, as a manager, to build on that investment through regular conversations, clear expectations and timely support.

The checklist below will help to guide you through the key steps of the probationary period. To help you apply the framework, you will receive email prompts via MyView at the vital stages of the framework which will help support a practical and consistent approach.

Before the employee starts

- ☐ Consider appropriate start date: for example, if term time or long-term supply, when is most suitable start date that will allow the employee to benefit from full extent of probation period? (for example, avoiding summer holidays).
- ☐ Plan Service and Team induction (systems, mandatory training, introductions, buddy/mentor). View our guidance on [how to plan an induction](#) and an [induction checklist](#).
- ☐ Consider expectations, objectives and milestones – what does success look like?
- ☐ Identify and plan any training required.
- ☐ Diary initial probationary progress meeting (to be held in first week of employment).

First few days – Induction and early engagement

- ☐ Deliver a team and service induction.
- ☐ Provide a clear description of the role.
- ☐ Explain the probationary process and expectations (including [expected behaviours](#)).

Week 1 – Initial probationary progress meeting: objective setting and initial review

- ☐ Check in with how employee is settling in.
- ☐ Set clear objectives and milestones.
- ☐ Outline success measures.
- ☐ Identify training and support requirements.
- ☐ Establish regular one-to-one meetings (minimum monthly during probation).

Months 1 to 3 – Ongoing review and support

- ☐ Hold monthly progress meetings.
- ☐ Explore how your new employee is finding the role.
- ☐ Provide feedback and review progress against objectives and milestones.
- ☐ If concerns raised, support these with evidence and explore reasons. Discuss and document improvement and any required support. (If no improvement, highlight potential outcomes – extending probation or capability hearing that could lead to dismissal.)
- ☐ During discussion, complete probationary progress review form with brief, factual notes, particularly where concerns have been raised.

Month 4 – Final probationary review

- ☐ Hold final probationary review meeting.
- ☐ Explore how the employee is finding the role.
- ☐ Provide feedback and review progress against objectives and milestones, reviewing overall suitability for the role.
- ☐ If concerns have been raised either acknowledge improvement or if there continue to be concerns, explore these, support with evidence and explore reasons. Discuss and document improvement and any required support.
- ☐ Advise outcome of probationary period – successful completion; some continued development/improvement needed – extension*; significant concerns – progress to capability hearing and outline consideration may be given to dismissal.
- ☐ Update probationary progress review form keeping brief, factual notes, particularly where issues have been raised. Indicate the outcome of the probationary period.

*If extending probationary period

- ☐ Confirm outcome of probationary period in writing using template (received via MyView when probationary progress review form submitted).
- ☐ Set up continuing one-to-ones to continue to review progress.
- ☐ Ensure extended final probation review is held at least 2 weeks prior to the end of the extended probationary period so if progressing to capability hearing this can be completed within six months (less one day) of employee's start date.

If progressing to capability hearing

- ☐ Confirm outcome of probationary period in writing using template (received via MyView when probationary progress review form submitted).
- ☐ Liaise with senior manager to hear capability hearing which must be heard within six months (less one day) of employee's start date.
- ☐ Collate all relevant information to be considered as part of the capability hearing (including objectives and milestones, probationary periods review templates which will include where concerns have been highlighted, and support provided), evidence that supports information recorded in reviews.

Senior manager to:

- ☐ book, as a priority, a 30-minute appointment with People and Culture for advice on holding the hearing via the [booking portal](#)
- ☐ issue invite to capability hearing using [template letter](#), advising employee of their right to representation and potential outcome could lead to dismissal
- ☐ provide a copy of all key information to be considered (from line manager)
- ☐ hold capability hearing and consider all information presented
- ☐ decide and confirm outcome; either:
 - probation passed and employment confirmed
 - confirm extension of probation and timescales
 - termination of employment giving relevant contractual notice and right of appeal

Leave

If you will be on leave when a review is due, please ensure the meeting is either reschedule or delegated to a colleague. Delegation arrangements can be made via MyView.