1. **EMPLOYEE DETAILS**

|  |  |
| --- | --- |
| Employee full name: |  |
| Post title: |  |
| School/Service: |  |
| Employee number: |  |
| Level: |  |
| Date of appointment: |  |
| Report number: |  |

 For example, report 1, report 2, report 3, report 4, report 5 or final report.  Monthly Probation reviews are required as per the Probation Policy during the probation period.

1. **SUPPORTING MATERIAL**

The following supporting material is attached to this report and supported the completion of this report.

|  |  |
| --- | --- |
| Employee’s job description | Yes/No |
| Personal training and development plan | Yes/No |
| Written performance targets with criteria for assessment | Yes/No |

1. **Line Manager**

For more information about the role of the line manager, please see the probation policy and guidance documents on the HR website.

Line managers are expected to provide guidance and advice to the probationer during their probationary period and will consult regularly, or as required, with the probationer, particularly if areas for improvement are identified during the probationary period and prior to the submission of the final probation report.

**Note.**

**It is recognised and accepted that the ‘role of the line manager’ is a broad and generic term and that the exact definition (i.e. who would deliver the role of the line manager in each process may vary across different faculties and services, as well as across different processes.)**

1. **RATING**

Please tick as appropriate. \*Ratings of D and E must be discussed with the individual. If there is no improvement, further action may be taken.

A: Exceptionally good B: Better than average C: Up to required standard

D: Below average E: Unacceptable

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Criteria | **A** | **B** | **C** | **D\*** | **E\*** |
| Competence: performance of duties |  |  |  |  |  |
| Motivation/attitude to work |  |  |  |  |  |
| Reliability, dependability |  |  |  |  |  |
| Accuracy |  |  |  |  |  |
| Learning ability, adaptability |  |  |  |  |  |
| Co-operation: with colleagues |  |  |  |  |  |
| Co-operation: with supervisors/senior staff |  |  |  |  |  |
| Supervisory ability (if applicable) |  |  |  |  |  |

|  |  |
| --- | --- |
| Punctuality/attendance: |  |
| Sickness absence during report period: |  |

1. **MANAGEMENT COMMENTS**

| Line Manager comments |
| --- |
|  |
| Signed: |  |
| Date: |  |

| Probationer comments |
| --- |
|  |
| Signed: |  |
| Date: |  |

1. **MANAGEMENT COMMENTS (final report only)**

| Line Manager/Head of School/Service comments |
| --- |
|  |
| Signed: |  |
| Date: |  |

| Probationer comments |
| --- |
|  |
| Signed: |  |
| Date: |  |

1. **RECOMMENDED ACTION**

|  |  |
| --- | --- |
|  | No action required. HR to upload report to employee’s record. |
|  | Confirm appointment  |
|  | Suspend probationary period\* |
|  | Extend probationary period\* |
|  | Terminate appointment\* |

**\*Please contact Ask HR to discuss action to be taken.**

| Reason for recommended action |
| --- |
|  |
| Signed: |  |
| Date: |  |

1. **RETURN TO**

Please submit the completed and signed report to HR using the appropriate request on ServiceNow:

* If no action is required and the report is to be uploaded to the employee’s record use the [Document Upload request](https://sotonproduction.service-now.com/serviceportal?id=sc_cat_item&sys_id=cc32dc666f1cf24073b03f742e3ee4ac).
* If the employee’s probation is to be confirmed use the [Probation Confirmation request](https://sotonproduction.service-now.com/serviceportal?id=sc_cat_item&sys_id=eb4911ba6f90364073b03f742e3ee46f&sysparm_category=c543a7bbdb91ef00f81bee71ca961908).