1. **EMPLOYEE DETAILS**

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

For example, report 1, report 2, or final report. We recommend reviews be held at least every three months during the probationary period.

If this is the first report, some of the headings below may not be applicable. Instead, a summary of progress to date will be acceptable to be accompanied by the training and development letter normally issued to probationary staff within the first three months of employment.

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 |
| Employee’s CV (for ERE only) | 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](http://www.southampton.ac.uk/hr/services/index.page?).

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. **DUTIES & PERFORMANCE**

|  |
| --- |
| Please indicate the duties assigned to the probationer and comment on how these have been performed. |
|  |

1. **TRAINING & DEVELOPMENT**

|  |
| --- |
| Please indicate any training needs that remain (this should be in the form of a personal training plan). |
|  |
| Please list any training courses attended / to be arranged. |
|  |

1. **AREAS FOR IMPROVEMENT**

|  |
| --- |
| If there was any adverse criticism during this period, please highlight together with the remedial action taken. |
|  |

1. **MANAGEMENT COMMENTS (regular reviews)**

| Line Manager comments | |
| --- | --- |
| Normally no more than one A4 page | |
| Signed: |  |
| Date: |  |

1. **EMPLOYEE COMMENTS (regular reviews)**

| Employee comments | |
| --- | --- |
| Normally no more than one A4 page | |
| Signed: |  |
| Date: |  |

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

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

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

| Employee comments | |
| --- | --- |
|  | |
| Signed: |  |
| Date: |  |

1. **RECOMMENDED ACTION**

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

**\*Please refer to your HR contact 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).