

This work instruction was last updated: 25th March 2010

HR Probation Process

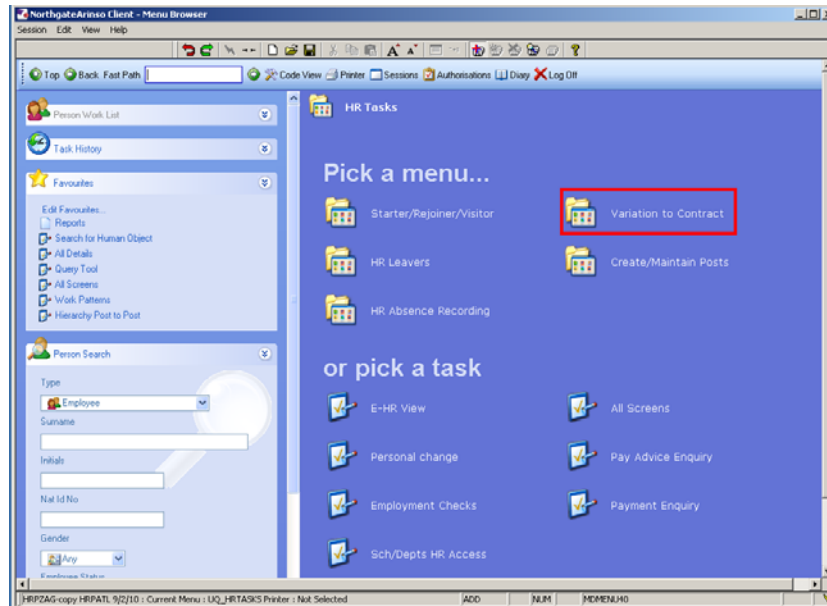
This Work Instruction describes the HR Probation Process.

With all of the data entry screens it is important to press the **ENTER** key to move between fields and until all of the fields have been accessed, whether you need to enter data into them or not.

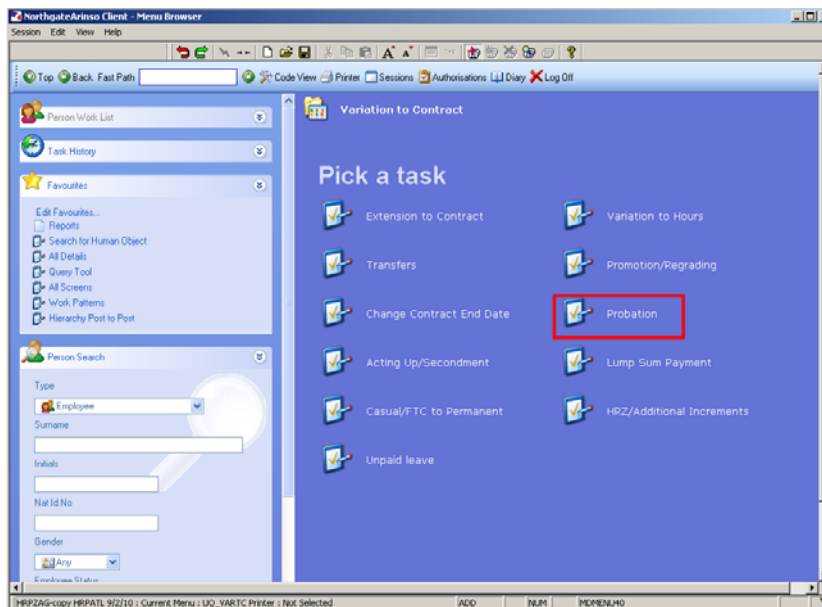
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| 1 | Completing the Probation Process on ResourceLink |
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1 Completing the Probation Process on ResourceLink

1.1 ResourceLink HR Home Page – HR Tasks – Variation to Contract



1.2 Variation to Contract – Probation



1.3 The following search form is made available

Task - HRZ/Additional Increments - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☐ Exact ☐ Partial

Employee Number

Surname

Sex

Current Employee ☐

Previous Surname

Known As

Initials

Nat. Ins. No.

As at Date

Add Search

Surname	Inits	Title	Emp Number	National ID Number	Start Date	For

Select Exit Save List

Enter an Employee Number CHANGE NUM MD5522

- 1.4 The Employee Number, Surname, Search and Select options are highlighted
- 1.5 Entering either the Employee Number or Surname select search.
- 1.6 Select the appropriate staff member from the list
- 1.7 Use this search screen to open the record of the person whose probation details you are updating.

Task - Probation - Employee Personal Detail

Session Edit View Other Process Tools Display Help

Employee 2073595 : MRS E BUCKET

Title Details

Legislation Type

Surname

Title

First Forename

Other Forenames

Prev. Surname

Known As

Honours

Generation

Personal Details

Gender


Date of Birth Age: 21 Years 8 Months

Nat. Ins. No. Case Number

Home Address Cont. Addresses Passport/Visa Contact Tel

Email Address Marital Status User Fields Notes

Enter the person's Surname CHANGE NUM MD553

- 1.8 Check that the person's personal details are correct.
- 1.9 Click on  to move to the **Current Post Holding** tab.

2 Current Post Holding Data Entry Screen

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	14/02/2010	DD01003391		GRADE 1B	PS002	N	Y	
002	01/02/2010	AA01000001	Y	GRADE 3	PS002	N	Y	

2.1 Click in the **Details** field and **Window in**.

MD47L3 Employee Post Holding Details

Detail

Post DD01003391 Clerical Assistant

Job MSA1B&2 Manag, Spec and Admin 1B & 2

Employee Grade GRADE 1B Level 1b

Post Grade GRADE 1B Level 1b

General Conditions Misc Grade Contract

Start 14/02/2010 SG001 New Appointment

End

Service In Post 1 Month 12 Days

Projected End

Post Main Flag ☐ Suspended ☐

Exc. from attracting Ee's Costs ☐

T/S Template Perf Management **User Fields** Notes Exit

2.2 Click on the **User Fields** button at the bottom of the window to open a window showing probation information.

Field Label	Field Contents	Description
Probation End Date	24/03/2010	
Prob Confirmation		
Prob Ext. Date 1		
Prob Ext. Date 2		
NHS Honorary C'tract		
Sch/Dept Contact		

Probation End Date 24/03/2010

Exit

- 2.3 If the employee has had their probation confirmed, click on the **Prob Confirmation** line and enter a “Y” in the field, then press **Tab** to validate through.

Field Label	Field Contents	Description
Probation End Date	24/03/2010	
Prob Confirmation	Y	Yes - Probabtion Conf
Prob Ext. Date 1		
Prob Ext. Date 2		
NHS Honorary C'tract		
Sch/Dept Contact		

Prob Ext. Date 1

Exit

- 2.4 If the employee is having their probation period extended, click on **Prob Ext. Date 1** and enter the new date that the probation period ends.
- 2.5 If the employee is having their probation period extended for a second time, click on **Prob Ext. Date 2** and enter the new date that the probation period ends.
- 2.6 Click on **Exit** to close the Probation User Field.
- 2.7 Click on **Exit** to close the **Employee Post Holding Details** screen.

3 Standard Letter

Seq	Letter	Ver	Description	Let Opts	Copies
001	CONFIRM	001	Confirmation of Appointment	NOACT	1
002	PROBEXTN	001	Probation extension	NOACT	1

Buttons: Add, Change, Delete, Expand, Exit

3.1 Click on the appropriate letter and click in the **Let Opts** field

Seq	Letter	Ver	Description	Let Opts	Copies
001	CONFIRM	001	Confirmation of Appointment	NOACT	1
002	PROBEXTN	001	Probation extension		

Buttons: Add, Change, Delete, Expand, Exit

Dropdown Menu Options:

Code	Desc	Long Description
MERGE	Manual	Immediate print with manual changes
NOACT	No Request	No action to be taken (no request)
PRINT	Print	Immediate request and print
PROMPT	Prompt	Prompt on commit for user action
QUEUE	Request	Request letter only
SAVE	Save	Save the merged letter

3.2 Click on the drop down and click on **MERGE**

3.3 Click on **Exit**.

DRT125EW Employee Post Holding

General

Select Employee Post Holding

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	01/02/2010			
002	DD01003391	14/02/2010			
003	AA01000001	01/02/2010			Y
004					
005					
006					
007					
008					
009					

Add Select Delete

Exit

3.4 Click on the employees post.

DRT533EW Complex Post Structure Selection

General

Select Post Structure Unit

Seq	Hierarchy	Eff Date

Add Select Delete

Exit

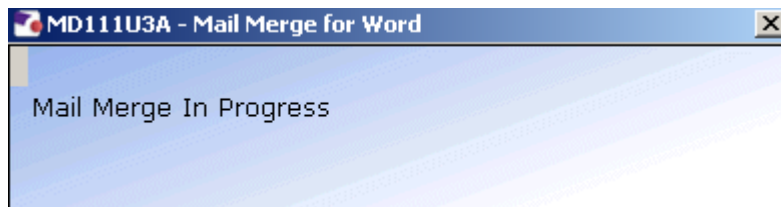
3.5 Select the Latest Hierarchy.

The screenshot shows a Windows-style dialog box titled "MD109G3 Enter Pop Up Field Contents". It contains a table with two columns: "Seq" and "Pop Up Prompt". The table has three rows of data. Below the table are three buttons: "Add", "Change", and "Delete". At the bottom right of the dialog is an "Exit" button.

Seq	Pop Up Prompt
001	Enter whether this is a Sch/ Dept/Div
002	Please insert signatory's name
003	Please enter RA/PA's tel number

Buttons: Add, Change, Delete, Exit

- 3.6 Click in the first row and enter the signatory's job title.
- 3.7 Click in the second row and enter the signatory's name.
- 3.8 Click in the third row and enter the signatory's telephone number.
- 3.9 Click on **Exit**.



- 3.10 The letter should generate in **Word** and you can print as normal.