Managing Probation for Professional Staff - CMPH

Managing probation effectively is an essential part of creating a positive onboarding experience for new employees. This document has been created to provide guidance for supervisors/managers on how to navigate the process successfully. Casual employees do not normally have a probation period.

Employee Details

Name:	
Position:	
Supervisor:	
Start Date:	
Location:	
End Probation date:	

Section 1. First Probation Check In (end of week one)

The first probation check in should ideally be completed at the end of the new employee's first week. This will provide the supervisor/manager an opportunity to ensure the employee has the required tools to do their job effectively. The first probation check in is a quick catch up that ideally should take no more than 10-20 minutes.

NOTE: If there are concerns with skills, knowledge, or behaviours at any time during probation, please ensure these are addressed immediately. If you need any assistance, contact the People & Culture team at cmph.pc@flinders.edu.au or rrh.pc@flinders.edu.au for further guidance.

Date:			
Manager / Supervisor / Delegate:			
Does the employee have the correct system access?	Y ☐		N ☐
If not, what system access is still required?			
Does the employee have the tools to do their job effectively? Eg: screens, stationary, equipment specific to position etc.	Y ☐		N ☐
If not, what tools are required?			

Has the employee completed the required induction modules (refer employee induction checklist)?	Y ☐	N ☐
If no, allocate time for the employee to complete.		
Reiterate Expectations of Job and ensure employee has a good understanding.		
Has employee written goals?	Y ☐	N ☐
If no, allocate time to assist employee with writing goals.		
Does the employee have any questions?	Y ☐	N ☐
Any follow up actions (i.e., systems access, hardware / software etc. follow up for employee questions, writing goals, etc.)		

Section 2. Second Probation Check In (end of week six)

This probation check in provides an opportunity for both parties to discuss how the first six weeks of employment have progressed. This is the time to ensure the induction has been completed and recorded, goals have been set and that the employee understands and meeting the expectations of the position. It is also a time for the employee to advise if they need support or training to do their job more effectively, or if there is something that is unclear about the expectations that have been set.

Date:		
Manager / Supervisor / Delegate		
Does the employee understand the expectations of the job? (You may want to go through the PD again as a refresher)	Y ☐	N ☐
If not, explain expectations again and provide a copy of the Position Description (PD) as a reference for the employee. Ask if there is anything that is unclear in the PD.		
Has Induction been completed?	Y ☐	N ☐
If no, set time frame for completion and follow up to monitor.		
Have goals been set?	Y ☐	N ☐
If no, schedule time in calendar to meet with employee to finalise goals.		

The following sections are designed to assist the supervisor/manager in making an informed decision on whether probation should be confirmed or not. These sections will consider aspects of the employees' position such as technical knowledge, soft skills, management of staff (where applicable) and team fit.

End of Week 6	Rating				
Technical Skills	Not able to assess	Unsatisfactory/ further training	Satisfactory	Very Good	Excellent
Technical skills to finalise required tasks	☐	☐	☐	☐	☐
Job completed on time and accurately	☐	☐	☐	☐	☐
Systems knowledge	☐	☐	☐	☐	☐
Output at an acceptable level	☐	☐	☐	☐	☐
Accuracy of work	☐	☐	☐	☐	☐
Add any technical skills specific to position below (if any)					
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
Soft Skills					
Punctuality and attendance	☐	☐	☐	☐	☐
Communication (written / verbal)	☐	☐	☐	☐	☐
Time management	☐	☐	☐	☐	☐
Interpersonal skills (interacting with others, internal and external)	☐	☐	☐	☐	☐
Problem solving	☐	☐	☐	☐	☐
Decision making	☐	☐	☐	☐	☐
Add any additional soft skills relevant to the position below (if any)					
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
FOR PEOPLE MANAGERS ONLY					
Management of the work of others	☐	☐	☐	☐	☐
Motivation – team building	☐	☐	☐	☐	☐
Development of team	☐	☐	☐	☐	☐
Delegation (fair and equitable amongst team)	☐	☐	☐	☐	☐
Responsive to team	☐	☐	☐	☐	☐
Completes people administration duties in a timely fashion (ie: approval of leave applications, VMRG, Workday, Service One)	☐	☐	☐	☐	☐
Add any additional people management skills relevant to position below (if any)					
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
Add any training / development that is required for employee on the sheet at the end of this template.					

By the end of week 12, sraff should have a good understanding of the technical requirements of their position. At this stage, they should be responsible for understanding their obligations and responsibilities as set out in the University's Code of Conduct.

End of Week 12	Rating				
Technical Skills	Not able to assess	Unsatisfactory/ further training	Satisfactory	Very Good	Excellent
Technical skills to finalise required tasks	☐	☐	☐	☐	☐
Job completed on time and accurately	☐	☐	☐	☐	☐
Systems knowledge	☐	☐	☐	☐	☐
Output at an acceptable level	☐	☐	☐	☐	☐
Accuracy of work	☐	☐	☐	☐	☐
Add any technical skills specific to position below (if any)					
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
Soft Skills					
Punctuality and attendance	☐	☐	☐	☐	☐
Communication (written / verbal)	☐	☐	☐	☐	☐
Time management	☐	☐	☐	☐	☐
Interpersonal skills (interacting with others, internal and external)	☐	☐	☐	☐	☐
Proactive approach to work	☐	☐	☐	☐	☐
Problem solving	☐	☐	☐	☐	☐
Decision making	☐	☐	☐	☐	☐
Contribute to the efficient and effective functioning of the team / work environment	☐	☐	☐	☐	☐
Contributes to continuous improvement	☐	☐	☐	☐	☐
Add any additional soft skills relevant to the position below (if any)					
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
FOR PEOPLE MANAGERS ONLY					
Management of the work of others	☐	☐	☐	☐	☐
Motivation – team building	☐	☐	☐	☐	☐
Development of team	☐	☐	☐	☐	☐
Delegation (fair and equitable amongst team)	☐	☐	☐	☐	☐
Responsive to team	☐	☐	☐	☐	☐
Completes people administration duties in a timely fashion (ie: approval of leave applications, VMRG, Workday, Service One)	☐	☐	☐	☐	☐
Add any additional people management skills relevant to position below (if any)					
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
Add any training / development that is required for employee on the sheet at the end of this template.					

End of Week 18	Rating				
	Not able to assess	Unsatisfactory	Satisfactory	Very Good	Excellent
Technical Skills					
Technical skills to finalise required tasks	☐	☐	☐	☐	☐
Job completed on time and accurately	☐	☐	☐	☐	☐
Systems knowledge	☐	☐	☐	☐	☐
Output at an acceptable level	☐	☐	☐	☐	☐
Accuracy of work	☐	☐	☐	☐	☐
Add any technical skills specific to position below (if any)					
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
Soft Skills					
Punctuality and attendance	☐	☐	☐	☐	☐
Communication (written / verbal)	☐	☐	☐	☐	☐
Time management	☐	☐	☐	☐	☐
Interpersonal skills (interacting with others, internal and external)	☐	☐	☐	☐	☐
Proactive approach to work	☐	☐	☐	☐	☐
Problem solving	☐	☐	☐	☐	☐
Decision making	☐	☐	☐	☐	☐
Contribute to the efficient and effective functioning of the team / work environment	☐	☐	☐	☐	☐
Contributes to continuous improvement	☐	☐	☐	☐	☐
Add any additional soft skills relevant to the position below (if any)					
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
FOR PEOPLE MANAGERS ONLY					
Management of the work of others	☐	☐	☐	☐	☐
Motivation – team building	☐	☐	☐	☐	☐
Development of team	☐	☐	☐	☐	☐
Delegation (fair and equitable amongst team)	☐	☐	☐	☐	☐
Responsive to team	☐	☐	☐	☐	☐
Completes people administration duties in a timely fashion (ie: approval of leave applications, VMRG, Workday, Service One)	☐	☐	☐	☐	☐
Add any additional people management skills relevant to position below (if any)					
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
Add any training / development that is required for employee on the sheet at the end of this template.					

Review Probation Period

Around the 18-week mark, you should receive a notification via Workday to advise that you need to review the probation period. You will have the choice to either confirm the probation or request further discussion.

At this point, if you are not going to confirm the probation, you will need to contact the CMPH People and Culture at cmph.pc@flinders.edu.au or rrh.pc@flinders.edu.au to discuss next steps.

Training and Development

If there are any training and development requirements that have been identified during the probation review, recording them here will assist in ensuring the employee attends and completes training as required. This form can also be used during the employee's performance review to inform any future development needs.

Training Need	Course Identified Y/N	Internal/External	Formal/Informal	Completed (Date)

Note: Depending on the type of course, your employee may be eligible to take advantage of the Professional Development Fund provisions under the *Flinders University Enterprise Agreement 2023 to 2026* to fund the training.

At the end of the probationary period, and once confirmed as complete, please save this document on the employee's personal file.