**Probation process for Line Managers**

All staff have a 12 month probation period, unless the contract is for a year or less, in which case the probation period will be for half the length of the contract.

During the probation period you should have regular one-to-one meetings with the employee so that any issues can be dealt with promptly and that the employee has sufficient support in their role.

The HR team will prompt you to a formal mid-probation review at 6 months. In addition to this, you should have informal meetings at 3 and 9 months, to check progress and review objectives.

The line manager checklist (sent prior to the employees start date) will provide expected dates of reviews.

At the start of the appointment, line managers complete the PF1 Objective setting form in discussion with the employee.

At the mid-probation review, line managers should meet with the employee to discuss progress against the objectives and the main aspects of the job role. Record the discussions on the PF2 form. Review and update the objectives using the PF1 form at the mid-probation review and as necessary during the probation period.

Please return all completed forms to HR ([HR@phc.ox.ac.uk](mailto:HR@phc.ox.ac.uk)). The line manager and the employee should each retain a copy.

On receipt of the PF3 form confirming that the probation period has been successfully completed, the HR team will write to the employee (cc to the line manager) confirming them in post.

Be aware that you cannot simply get to the end of probation period and decide to end the appointment. There is a formal process, including written warnings, to be followed in order to dismiss under probation.

Contact HR as soon as issues arise if you think formal action may need to be taken during the probation period (eg a formal written warning) or if the probation period may need to be extended.

**Relevant documents:**

New Starter Induction Checklist for line managers

List of training courses to be undertaken during probation period

PF1 – Objective Setting form

PF2 – Mid-probation review form

PF3 – End of probation form

Standard letter confirming successful end of probation