

Employee Probationary Periods

Transfer to Online Module in One Council

Purpose

To outline:

- Why the City has employee probationary periods
- Relevant Documents
 - Legislation
 - The City of Kwinana Enterprise Agreement 2021
 - The 'Employee Probation' internal policy
- How the City tracks employee performance during probationary periods
- What is changing in the new One Council module
 - How you will complete the performance evaluations
- Probationary process itself
- Guidance materials

Relevant City Documents

- Enterprise Agreement
 - Cl. 5.4 – 3 month probationary for all new FT, PT and fixed-term employees
 - Can be extended by another 2 months
- Policy
 - Employee Probation - linked to legislation, common law and best practice

Why do we have Probation Periods?

- To give the City the opportunity to review the employee's suitability and effectiveness in their new role.
- To give the Manager/Supervisor and the employee the opportunity to establish a constructive working relationship.
- To provide the opportunity to take corrective action (through staff development and/or training) to address any deficiency in performance.
- To give the employee the opportunity to assess whether or not the position meets their requirements and expectations.

Legislation – Probationary Periods

- WAIRC (WA Industrial Relations Commission) has ability to decide whether a termination is “harsh, oppressive or unfair” (s. 23A of the *Industrial Relations Act 1979* (WA))
- In determining, they must have a regard to whether an employee was:
 - on a probationary period that was agreed between employer & employee; and
 - They had been employed for less than 3 months
- This is different to the *Fair Work Act 2009* (Cth)

How have employee probationary periods been performed?

- Managers have been tasked with performing the valuations
 - Meeting dates are scheduled with the new employee
 - The evaluation is performed correctly in line with City parameters (role requirements are explained, objectives are achievable etc.)
- The process has been filling out an electronic/paper 'Performance Evaluation – during probationary period' form
 - Form is submitted to the HR team
- Probation periods typically are of 3 months in length
 - Meetings with the employee are held at week 1, week 5 and week 8
- Approval to end probationary periods are authorised by the relevant Director

What is changing in the new online module?

- No changes to the questions that are in the electronic/paper form
- More streamlined process that reminds managers and staff of the need to complete the next step
- Integration with the Staff Development Review (SDR) process
- Probation periods are still typically 3 months in length
 - Meetings with the employee are held at week 1-2, week 4-5 and week 10
- 'Training Matrix/Audit Form' is also performed electronically
 - This identifies any skill gaps and highlights any required training
- **This does not replace the need to have face to face meetings with employees at various stages of probation**

The Probationary Process

- Generally consists of:
 1. Initial Probation Assessment
 2. Interim Probation Assessment
 3. Final Probation Assessment

If needed

4. Probation extension (must be discussed with HR and signed-off by the relevant Director)

What happens during the Initial Probation Assessment?

- Initial Probation Assessment – performed in Week 1-2
 - Training Matrix/Audit Form is completed
 - Do it at initial stage
 - Outlines training requirements for next 3 months
 - A total of 8 Manager Questions are asked that consist of:
 - 4 generic questions
 - e.g. was the employee provided key documents (policies/procedures, position description etc, were they advised of administrative processes in the team?)
 - An extra 4 questions that consist of:
 - 4 x Areas of responsibility
 - 4 x Agreed actions (who, when
 - 4 x target dates for goals
 - Overall comment
 - Comment from the manager
 - An opportunity to comment by the employee
 - Opportunity to attach documents



What happens during the Interim Probation Assessment?

- Interim Probation Assessment – performed in Week 4-5
 - Training Matrix/Audit Form does NOT need to be completed
 - A total of 4 Manager Questions are asked that consist of:
 - Discussing the employees progress and performance
 - Discussing any problems or concerns and developed strategies to address
 - Discussing any professional development and training needs
 - Clarifying the position requirements
 - Overall comment
 - Comment from the manager
 - An opportunity to comment by the employee
 - Opportunity to attach documents



What happens during the Final Probation Assessment?

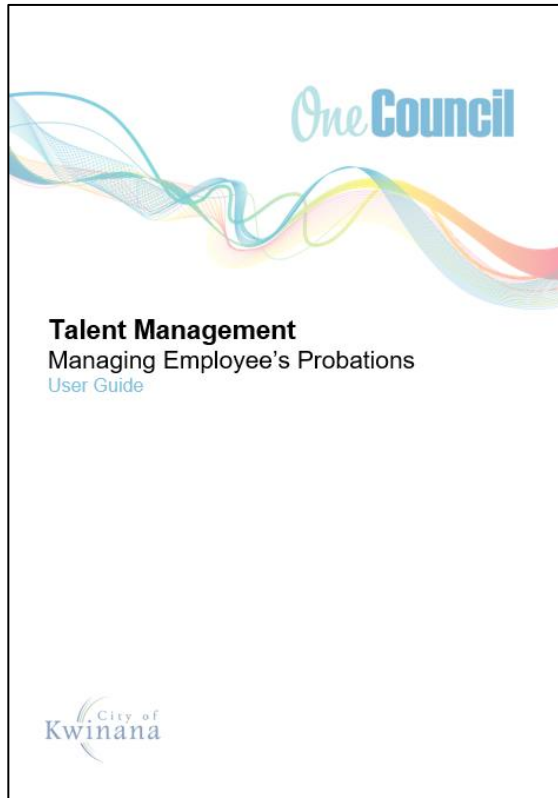
- Final Probation Assessment – performed no later than Week 10
 - Training Matrix/Audit Form does NOT need to be completed
 - A total of 38 Manager Questions are asked
 - These are questions that were formerly on the electronic/paper form
 - Overall comment
 - Comment from the manager
 - An opportunity to comment by the employee
 - Outcome from the probationary period
 - Is the employment confirmed, not confirmed?
 - Is the probationary period to be extended?
 - We are currently trying to have this performed in the second manager step
 - Otherwise measures will be put in place
 - Opportunity to attach documents



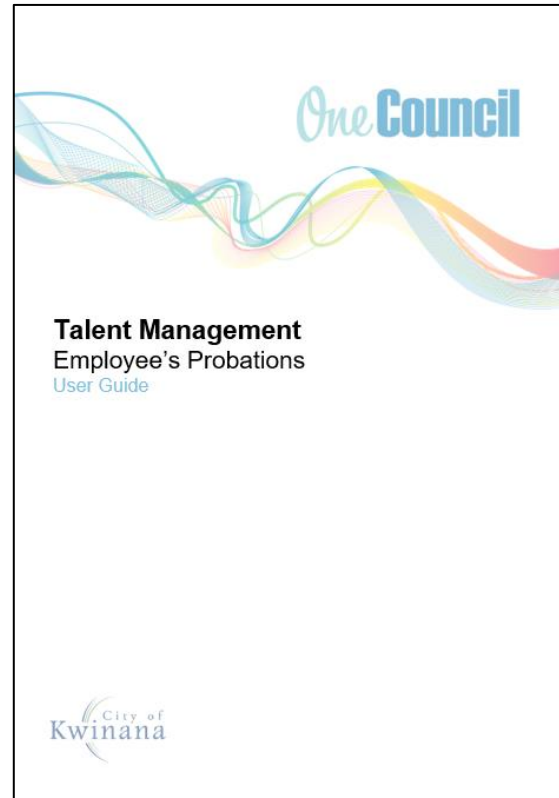
What each manager must do...

- Set calendar reminders to complete the probation assessments
 - Only one reminder is able to be sent – this is done on the 11th week
- Provide clearly defined work objectives
- Define standards and measures by which work outcomes and performance will be assessed
- Ensure the outcomes are agreed and trackable
- Provide the necessary resources to enable work outcomes to be achieved
 - Relevant tools, advised of administrative procedures, provided key documents etc.
- Collaborate with the employee for learning and development
 - Has 'buddying-up', mentoring or being teamed with more experienced colleagues been considered
- Its not about catching employees out but ensuring they are suitable for their role
- Provide constructive feedback and recognition of performance outcomes
- Apply the principles of natural justice, fairness and equality

Employee Probation 'User Guides' are available...



For manager guidance



For employee guidance

Video Guide: Initial, Interim and Final Probation Assessment Video Tutorial

The screenshot displays the TechnologyOne HR system dashboard for user Callum Malloch-Smith. The interface includes a top navigation bar with 'HOME', 'MENU', and 'cia' logos, and a search bar labeled 'Enterprise Search'. Below the navigation is a breadcrumb trail: Home (8) > MY KWINANA > Talent and Succession (2) > All Roles. The main content area is titled 'Home' and features several widgets:

- My Tasks (8):** A list of tasks including:
 - Peter Parker (2) Final Probation Employee Appraisal: Manager Assessm...
 - Peter Parker (2) Interim Probation Employee Appraisal: Manager Assessm...
 - Peter Parker (2) Initial Probation Employee Appraisal: Manager Assessm...
 - Peter Parker (2) Performance Plan 2026 Employee Performance Plan: Manager ...
 - Gary Kay (3276) Performance Plan 2025
- Forms (0 Draft forms):** A section for forms, showing 13 completed forms.
- My Team (78 Requiring attention):** A section for team management, showing:
 - HR: 52
 - Timesheets: 26
 - Leave
 - 1 fixed term contract ending soon (Management Accountant)
 - 14 performance goals (Management Accountant)
 - 21 development goals (Management Accountant)
 - 2 performance plans required (Management Accountant)
 - View Team Analysis
- Other Widgets:** Ci in the Cloud, Attachment Entities, My Reports, Customer Community, Help, and TechnologyOne University.

At the bottom of the dashboard, there is a 'More (4)' button and a footer with the text 'Powered by TechnologyOne | Enterprise software, incredibly simple' and buttons for 'Discover 2022B' and 'Feedback'.

Video Guide: Training Matrix/Audit Form

The screenshot displays the CiA Workplace dashboard. At the top, there is a browser window with the URL `kwinana-uat.t1cloud.com/T1Default/CiAnywhere/Web/KWINANA-UAT/Workplace`. The dashboard header includes the 'cia' logo, an 'Enterprise Search' bar, and a user profile for 'Callum Malloch-Smith'. A navigation bar below the header contains several menu items: 'Home' (27), 'All Users - Finance', 'MY - KWN' (5), 'Organisation Management', 'Talent and Succession' (1), and 'HR Administration' (1). The main content area is titled 'Home' and features a 'My Tasks' widget on the left, which lists tasks such as 'Form: Manager Entry' and 'Training Matrix - Skills Audit' forms. To the right of the 'My Tasks' widget are several quick links: 'Ci in the Cloud', 'Forms' (7), 'Attachment Entities', 'Customer Community', 'Help', 'TechnologyOne University', and 'Try the new TechnologyOne University'. A 'More (4)' button is located at the bottom of the dashboard. The footer of the dashboard includes the text 'Powered by TechnologyOne | Enterprise software, incredibly simple' and buttons for 'Discover 2022B' and 'Feedback'. The Windows taskbar at the bottom shows the system tray with the date and time '4:27 PM 5/05/2023'.

Further questions?

Please contact a member of the HR team!