Talent Management
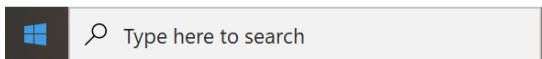## Employee's Probations
User Guide

One Council

About OneCouncil

One Council is the new all in one Enterprise Resources Platform for Payroll, Finance, Supply Chain, Contracts, Asset Lifecycle Management, Works and Content Management.

Log on by Kwinana Email

Log on from your work computer

a) Type OneCouncil in the search bar

🔍 Type here to search

b) Double click on the OneCouncil icon

c) Click on Office 365: for @kwinana.wa.gov.au email accounts

Log on from your own device

a) Open your web browser
b) Enter URL: https://kwinana.t1cloud.com/
c) Click on Office 365 and add your @kwinana.wa.gov.au email account and network password

Log on by Personal Email

a) Open web browser
b) Enter URL: https://kwinana.t1cloud.com/
c) Forgotten Password? Select:
   - to reset your password or
   - First time logging on (password reset is required)
d) Username: personal email address
e) Password: personal email password

Using this Guide

Notes for extra information.

Tips for handy hints.

Cautions before proceeding.

Online video tutorial reference.

Need extra help?

Support Page

☰ MENU

(?) Help & Assistance

🔗 OneCouncil Support page

Look for the OneCouncil Change Champion sign on their desk.

One Council Change Champion

Contents

1.0   Overview

The probationary period gives the City and the employee time to establish whether there is an appropriate match of skills and behaviour to the requirements of the job and the work environment.

Summary of the purpose of a probationary period:
- To give the City the opportunity to review the employee's suitability and effectiveness in the position to which they have been appointed.
- 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.

The Manager/Supervisor will be responsible for appraising the employee's work performance at the end of their first week, after completing four weeks and after completing ten weeks during the probationary period. This will ensure that at the end of the three months probationary period, both the Manager/Supervisor and the employee have a clear understanding of the employee suitability for the role and the appropriate next actions.

For more information please refer to the City's Probation Policy D14/1602 [v5].

1.1   Probation Process
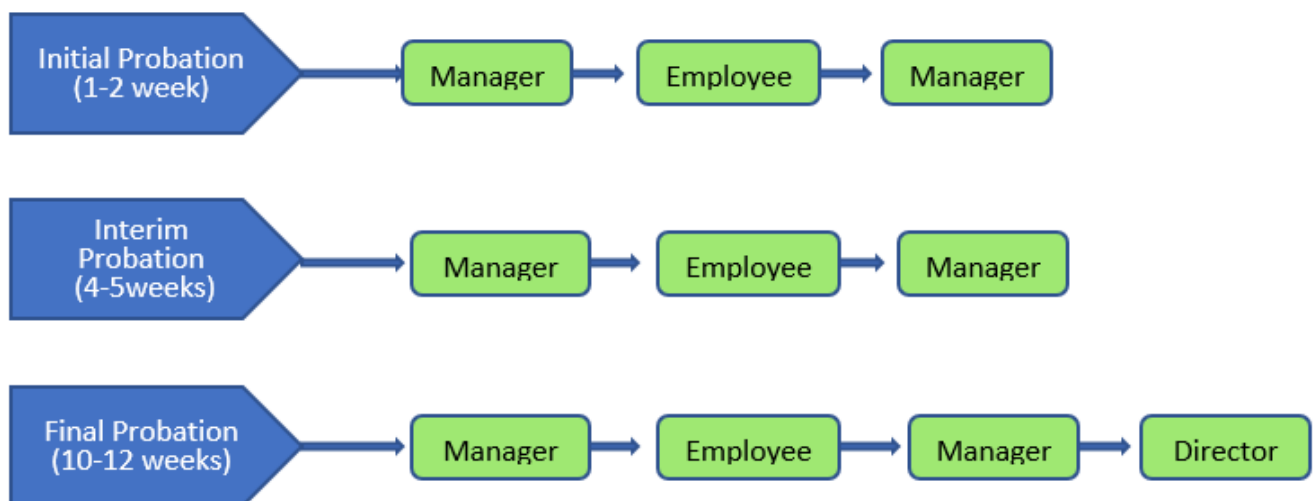
1.2   Supplementary Information

The interface of the Probation process consists of:
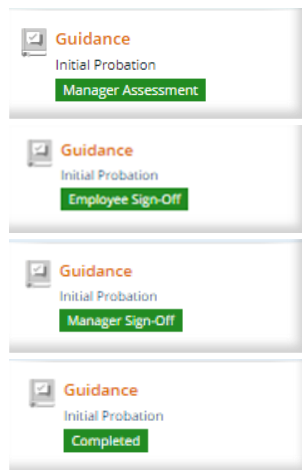
A. Guidance
Information on the Probation for employee and manager.

B. Status of Probation

The Green highlight indicates which stage the probation is currently at. There are four stages in the Probation process:

- o Manager Assessment

- o Employee Sign-Off

- o Manager Sign-Off

- o Completed

C. Manager Questions

These are set questions the manager has answered regarding your probation period. These can vary depending on which stage of the probation assessment (Initial, Interim or Final) you are currently in.

The manager will also be required to provide a mandatory applicable rating.

| Rating	Description
1	Not Applicable
2	No
3	Yes

If the field has a red Asterix (*) against it, this will indicate that it is a mandatory field.
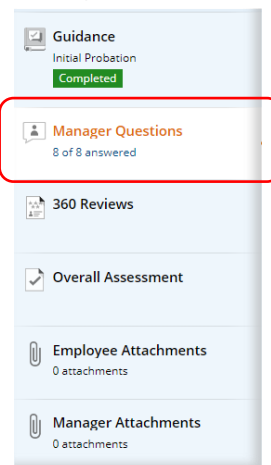
D. 360 Reviews - Note: The City of Kwinana are not utilising 360 reviews.

E. Overall Assessment

This section gives the employee the opportunity to review the managers comments and make their own comment on the overall aspect of each Probation assessment.
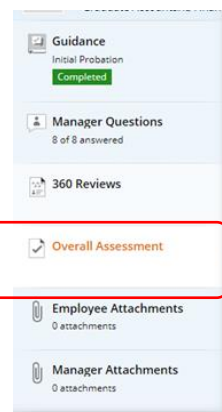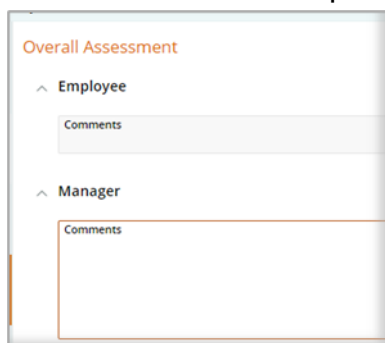
### F. Employee and Manager attachments and notes

These sections are for any applicable attachments or notes to be saved. To do this:

- Add a document by selecting the ADD button and selecting the file from the local drive or by dragging and dropping the file into the attachments section.
- You can also write a note, by choosing - **Add note.**
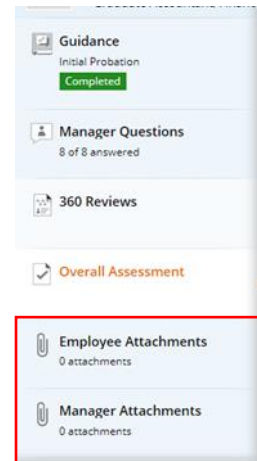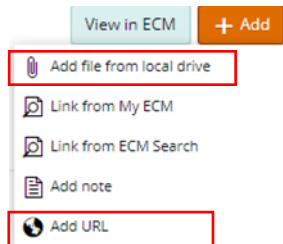

G. Functions and Action Menu's

Depending on what stage the Probation assessment is at will determine which functional buttons are visible on display, such as:
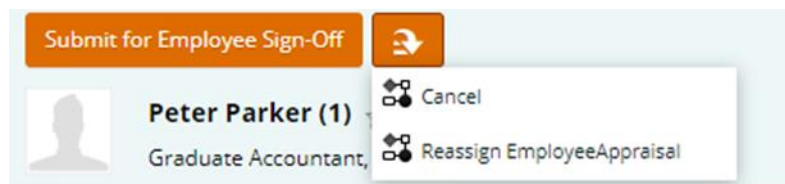
- **Submit for Employee Sign-Off** - Manager will use this function to progress the Probation to the next stage
- **Sign off** – Employee will use this function to sign off the Probation and return to Manager.
- **Return Without Sign-Off** – Employee can return Probation without signing, and will have the opportunity to add a comment before returning, prompting a conversation to be had with their manager.
- **Change Assessment** – The manager can select this when the assessment requires changing. This will return the probation to the Employee for Sign-Off once more.
- **Answer** – Manager will choose this function to prompt an answer dialog box for the Probation questions.
- **Cancel** – Cancel the probation.
- **Edit** – To prompt a dialog box or change the response.
- **Save** – to save the response
- **Save & Next** – Save the response and moves to the next question.
- **Add** – to add to the selection.
- **Details** – Details of the Answer provided.

1.3   Notifications

When a new employee commences, a probation process will be completed by the manager and employee, and an auto generated notification email and task notification is sent to advise when the different stages of the probation appraisals are due. For both employees and managers, this notification will appear on the 'My Tasks' section of the home page of One Council.
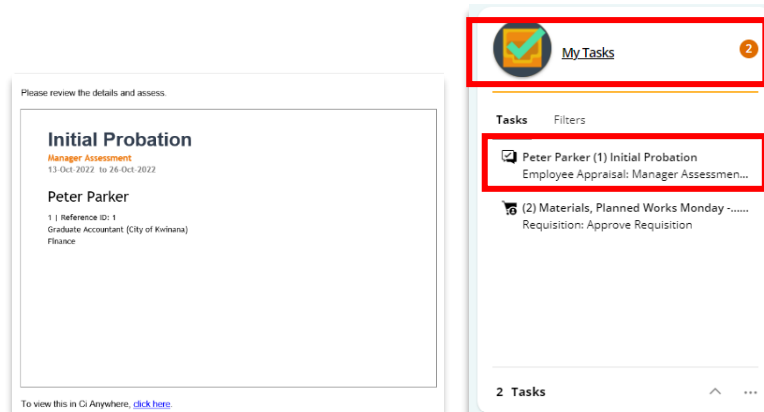
Click on the specific notification that is listed to start the online probationary process.

> There are 4 steps included in the Probation Process:
> 1. Initial Probation after 1 week.
> 2. Initial Probation includes completing the Training Matrix Form. (See Guidance section)
> 3. Interim Probation after 4 weeks.
> 4. Final Probation after 10 weeks.
>
> *When each stage of the probation process needs to be completed, each manager and probationary employee will receive a new notification in OneCouncil.*

2.0 Completing a Probation Assessment

① After launching the Probation, either by the notification email or task notification in OneCouncil, select **View Appraisal**.

Peter Parker (2) Initial Probation

ˆ Summary
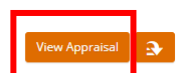
② The Appraisal will open
- Guidance notes are supplied in the information table.
- **Click** on the link in More information, under the Guidance table, to open the Training Matrix/ Skills Audit form to be completed.
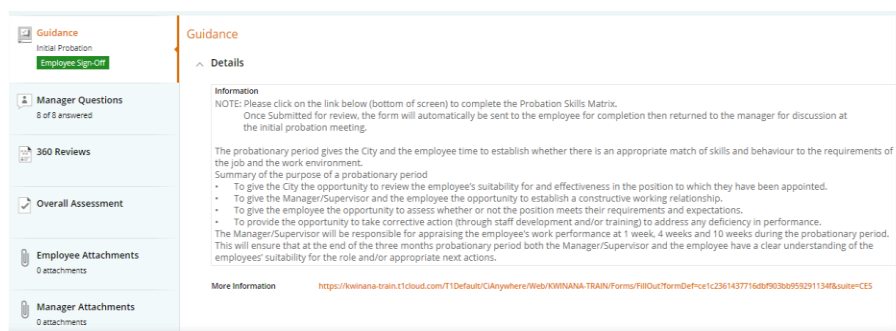
Note 1: if you are unable to see the text as above, please click on the ⌄ next to 'Details'

Note 2: the link that is identified above leads to the 'Training Matrix – Skills Audit' form which is outlined below.

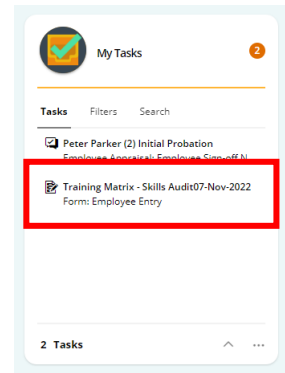> The Training Matrix/Skills Audit form, forms part of the initial Probation assessment. This form is required to be completed to answer the 1st question in the initial Probation (it is not required to be completed in the Interim or Final Probation review). Click on the link to the training matrix form under the Guidance table.

3.0 Training Matrix Form

① The Training Matrix form identifies any generic training requirements by:

  A. The manager identifying and rating the level of skills required by the position, and

  B. The employee rating their skill level.

  C. This will identify any gaps for possible training.

  D. **Click** on the notification regarding the Training Matrix Form.
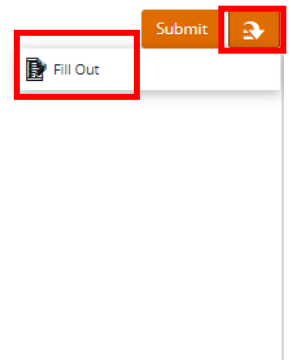
  E. **Select** 'Fill Out' from the drop-down menu. This will take you to the Training Matrix Form that requires the employee to rate their skill level from the drop-down box.

② Your Manager will have already completed which skills, and their required level of competency, which are required for your role and made any necessary comments.

  - Select the drop-down menu by clicking on the drop down menu next to the skill that is listed and **click** 'Edit' to add the level of competency that you feel you have for a particular skill

- **Select** from the options for the rating of the skill.

Note: 'Nil' in this Training Matrix Form means that you feel like you have no level of competency in the skill that is required for the role. If you were to select 'Nil', it would likely mean that some training in the skill is required.

- Insert any additional comments if needed (<u>make them so they can be identified as coming from the employee</u>).

- Then, **Save**
- Once all skills have been rated, select **Save.**
- Then select **Submit.**
- The form will then be sent back to the manager for completion.

Note: The ranking of the training requirement (performed by nominating the 1st to 5th preference in the 'Rank Top 5') is not required to be filled out by the employee and will be filled out by the Manager/Coordinator to identify the urgency of the training.
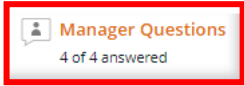
4.0 Employee Probation Process

4.1   Initial Probation Assessment

Return to the Probation Assessment by following the steps in '2.0 Completing a Probation Assessment'.

> In the initial probation stage, there is a list of generic questions that need to be answered by the manager. These relate to whether the employee was provided key documents (policies/procedures, position description etc.) and advised of the various administrative processes in the team/area. It is key that these are provided to the employee so the requirements of their role are known.

① The Employee will receive a Task and notification email to sign-off the Initial Probation.
- **Click** on the task.
- Click **View Appraisal** to open the Probation.
- **Click** on Manager Questions.
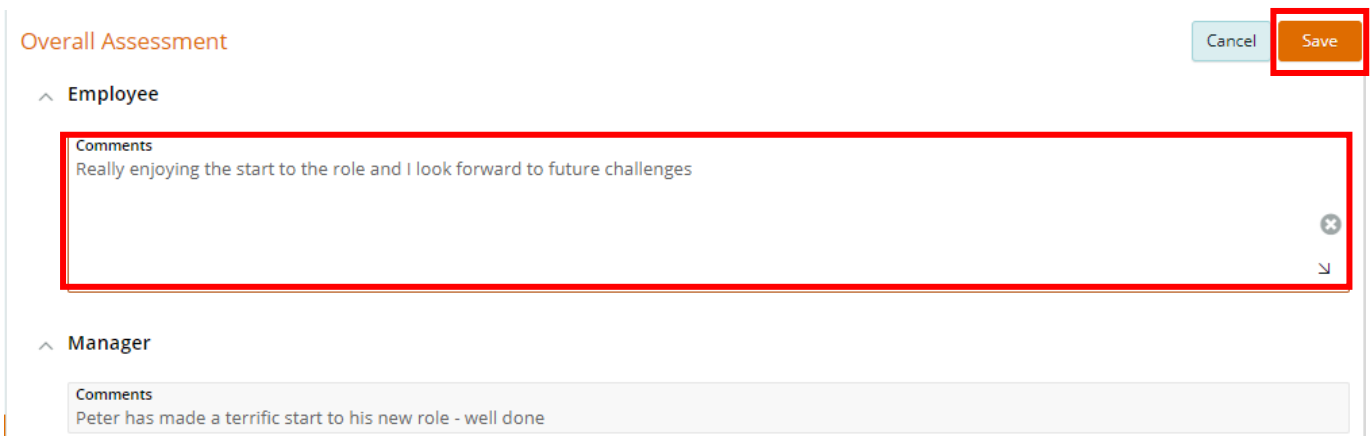- **Review** the Answers.
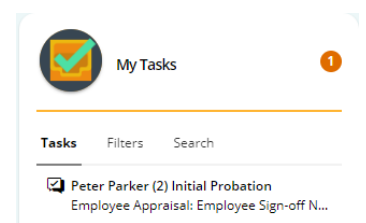
Note: Employees are not able to change any of the responses to the 'Manager Questions' but are able to make a comment in the following 'Overall Assessment' section of the process.

② **Click** on the 'Overall Assessment' section.

- Select **Edit**.
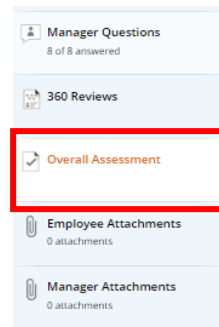
- **Review** your Managers Overall Assessment comment.
- Enter a comment that summarises your experience in the role so far (note that this is not mandatory).
- Select **Save.**

Overall Assessment

Cancel   Save

∧ **Employee**

Comments
Really enjoying the start to the role and I look forward to future challenges

∧ **Manager**

Comments
Peter has made a terrific start to his new role - well done

③ After the employee has reviewed the 'Managers Questions' and 'Overall Assessment', the employee needs to 'sign-off' the Initial Probation.

- The employee can either select '**Sign-Off'** or '**Return without Sign-Off'** from the action menu.
- **Sign-Off** will return the Probation to the manager to complete.
- No further action is required by the employee until the next part of the probation process.

Or
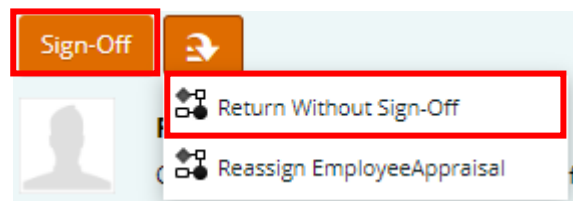
- **Return without Sign-Off** – The employee can return the Probation without accepting the managers comments/answers but will be required to add a comment.
    o The probation will be returned to the manager by email and task, this will prompt a conversation to be had with the Manager/Employee.
    o The manager can then review the probation and make any changes that are required.

4.2   Interim & Final Probation Assessments

①   An **Interim Probation** assessment will be issued at **4 weeks**.

- As per previous stages of the probation process, the employee's manager will receive the prompts to complete the 'Interim Probation Assessment'.
- Although this if for a different part of the probation process, complete the steps '①' to '③' as per '4.1 Initial Probation Assessment' above as the steps are very similar.

Note: the steps to complete the Interim Probation Assessment is the same as the Initial Probation Assessment.

②   A **Final Probation** Assessment will be issued at **10 weeks**.

- As per previous stages of the probation process, the employee's manager will receive the prompts to complete the 'Final Probation Assessment'.
- This part of the entire probationary process will also be signed-off by the employee's Director.
- Although this if for a different part of the probation process, complete the steps '①' to '③' as per '4.1 Initial Probation Assessment' above as the steps are very similar.
- As part of the Overall Assessment in the Final Probation Assessment, the Manager will indicate whether:
    - the probation period will be end and the employee's employment will be confirmed (meaning <u>the employee successfully completes the probation</u>); or
    - the probation period will be end and the employee's employment will not be confirmed (<u>meaning the employee does not pass the probationary period</u>); or
    - the probationary period will be extended.
- If the employee does not successfully complete their probation or their probation period is extended, this will be discussed with employees <u>prior</u> to them receiving a notification to compete the Final Probation Assessment.

③   **Confirmation** of the Probation outcome will be sent by HR once the Probation has been finalised by the Director.
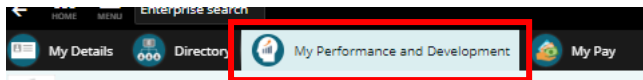
FAQs

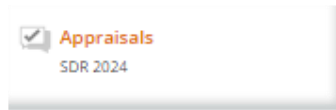## As an Employee where can I view my completed Probation?
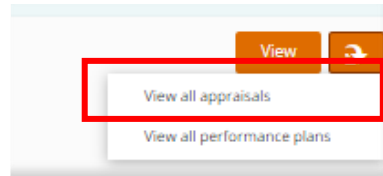
①   **Select** 'My HR & Pay' function tile.

My HR and Pay
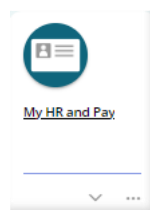
② **Select** 'My Performance & Development'.

③ **Select** 'Appraisals'.

④ **Click** on the Action Menu.
- **Select** 'View all Appraisals'.

⑤ All appraisals will be displayed here.
- **Select** the Appraisal you would like to view.
- **Click** on 'View' [View] to open the appraisal.