



One **Council**

Talent Management
Managing Employee's Probations
User Guide

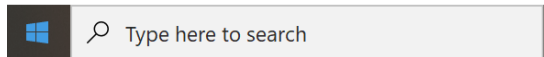
OneCouncil

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
Type OneCouncil in the search bar



Double click on the OneCouncil icon



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

Log on from your own device

Open your web browser

Enter URL: <https://kwinana.t1cloud.com/>

Click on Office 365 and add your @kwinana.wa.gov.au email account and network password

Log on by Personal Email

Open web browser

Enter URL: <https://kwinana.t1cloud.com/>

Forgotten Password? Select:

- to reset your password or
- First time logging on (password reset is required)

Username: personal email address

Password: personal email password

Using this Guide



Notes for extra information.



Tips for handy hints.



Cautions before proceeding.

Need extra help?

[Support Page](#)



MENU



Help & Assistance



OneCouncil Support page

Look for the OneCouncil Change Champion sign on their desk.



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Contents

Log on from your work computer	2
1.0 Overview	4
2.0 Completing a Probation Assessment.....	7
3.0 Training Matrix Form	8
4.0 Employee Probation Process.....	10
FAQs.....	16
As a manager, where can I view my employees Probation.....	15
As an employee, where can I view my Probation.....	16

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.

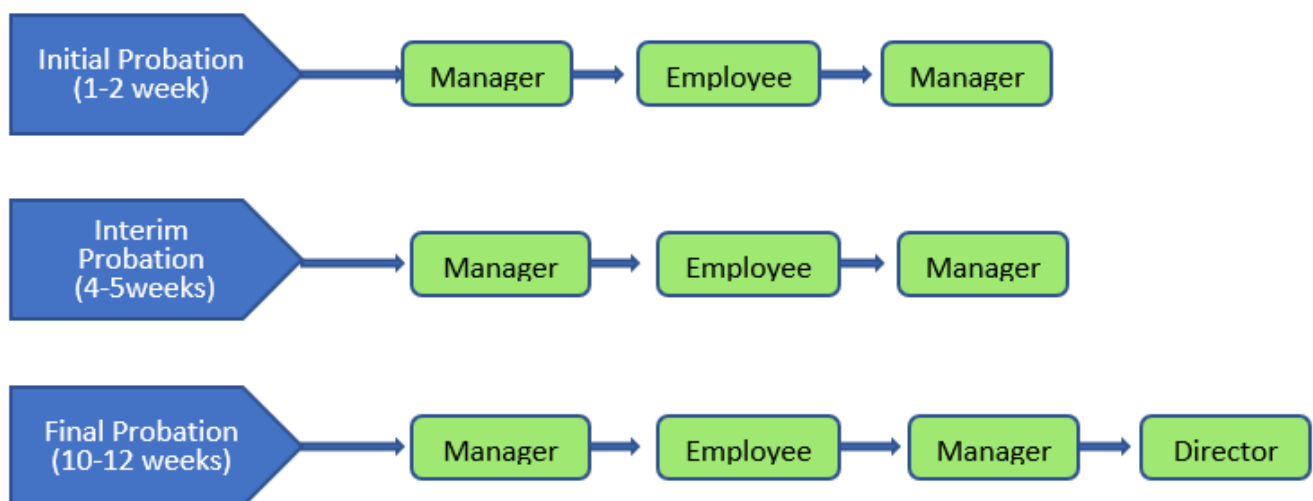
Summary of the purpose of a probationary period:

- * 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:

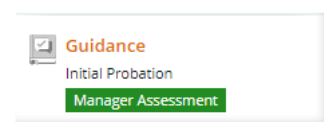
A. Guidance

Information on the Probation for employee and manager.

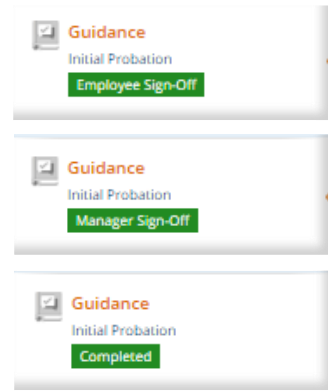
B. Status of Probation

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

- o Manager Assessment



- Employee Sign-Off
- Manager Sign-Off
- Completed




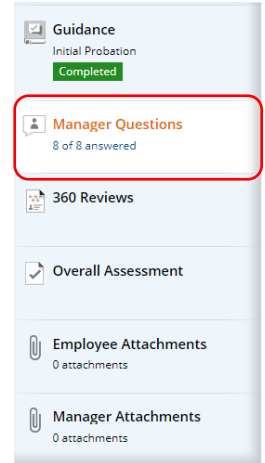
C. Manager Questions

These are set questions the managers will answer.

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

Rating *	
3	
Rating	Description
1	Not Applicable
2	No
3	Yes

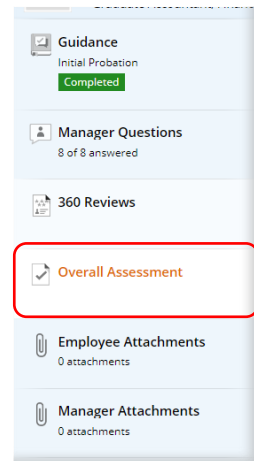
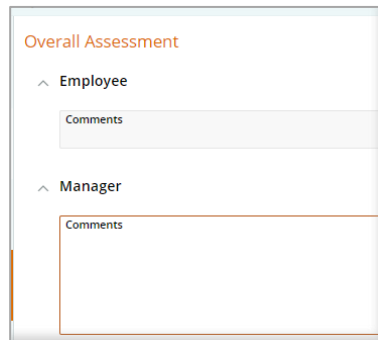
 If the field has a red Asterisk (*) against it, this will indicate that it is a mandatory field.



D. **360 Reviews** - Note: The City of Kwinana are not utilising 360 reviews.

E. Overall Assessment

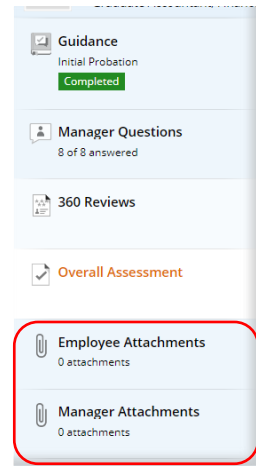
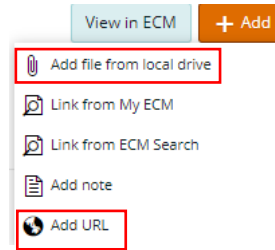
This section gives the employee and manager the opportunity to provide an overall comment on each Probation assessment.



F. Employee and Manager attachments and notes

These sections are for any applicable attachments or notes to be saved.

- 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**.

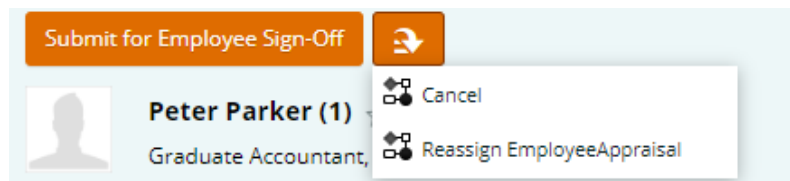


G. Functions and Action Menu's

Depending on what stage the Probation assessment is, this will determine which

functional buttons are visible on display, such as:

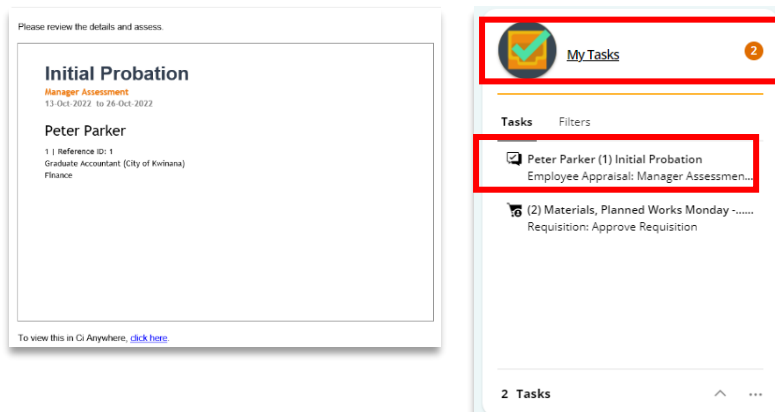
- **Submit for Employee Sign-Off** - Manager will use this function to progress the Probation to the next stage
- **Sign off** – Employee will use this function to sign off the Probation and return to Manager.
- **Return Without Sign-Off** – Employee can return Probation without signing, and will have 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 probation appraisals are due.

Click on the specific notification under the sub-heading 'Tasks' 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.

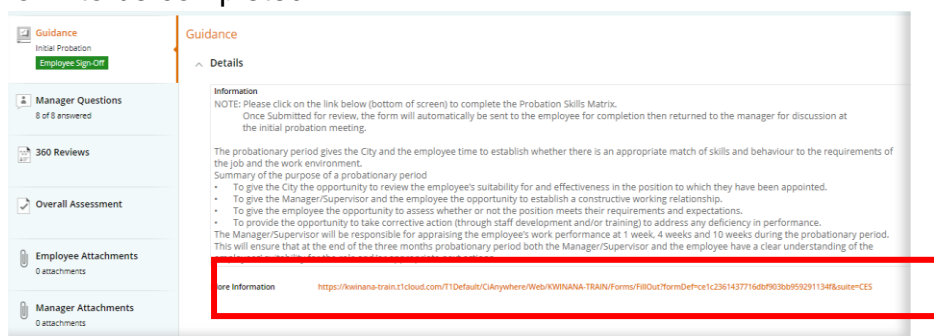
When each stage of the probation process needs to be completed, each manager and probationary employee will receive a new notification in OneCouncil.


2.0 Completing a Probation Assessment

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



- 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. **Select** the employee by entering their name and selecting from the drop-down box (the next three boxes will automatically fill).
 - E. **Select** 'Add' to add a skill required for the role.

Page

Submit

Section

The Training Matrix form has a list of competencies/skills which can be used for the employee to rate their level of expertise from a generic list. Starting with this list can further develop the conversation around their individual requirements.

You may like to add your own skills:

Employee: *
Peter Parker (2)

Employee Name
Peter Parker

Employee Position
Graduate Accountant

Supervisor Name
Bruce Banner

Manager: Please select the skills relevant to the employee's role and rate the skill level associated with the Position.

Employee: Please rate your knowledge on the skills selected by your manager.

Training Matrix

+ Add

Skills/ Knowledge	Position Rating	Employee Rating

- ② The manager can choose from a generic list of skills required for the position, from the drop down, choose the Skill.



There are specific skills listed for City Operations only. These will have (City Ops) in the heading.

Training Matrix

Skills/ Knowledge

- Asset Management
- Business planning & reporting
- Chairing meetings
- Code of Conduct
- Conflict management
- Customer request system
- Customer service standard
- Equal employment opportunity

Note: Only list training for skills that are relevant to the position



If the skill is not listed in the drop-down, you can choose a relevant 'OTHER' Skill and record the skill in the comments box.

③ **Position Rating** - Select the skill level required for the position

- Beginner
- Intermediate
- Advanced / Coach
- Click **Save &** then continue to **ADD** other skills (if applicable)



IMPORTANT: This rating is not the employee skill level, it is the skill level required for the position. The employee will rate their skill level once the form is completed by the manager.

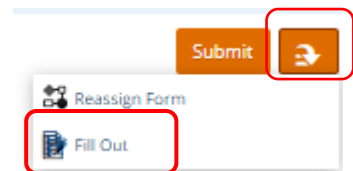
④ Once all applicable skills have been chosen, rated and any additional comments have been inserted (make them so they can be identified as coming from the manager), **Submit** the form for review. This will automatically send the form to the employee for completion.



Note: The ranking of the training requirement (performed by nominating the 1st to 5th preference in the form) will require a task and a notification until after the employee has rated their skill level in the 7th step below.

⑤ The employee will receive a task and a notification email.

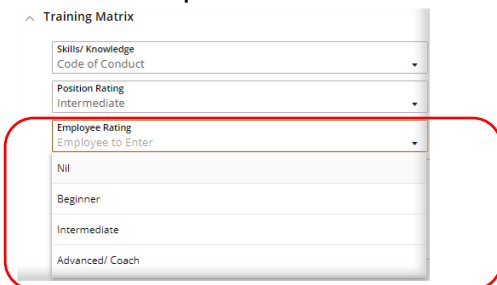
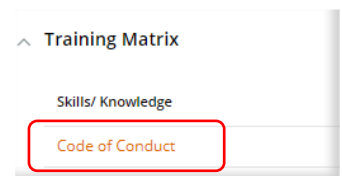
- Click on the **Task**
- Click on the **Action Menu**
- Select **Fill Out** from the drop-down in the Action Menu.



 To fill out the form - Click on the Action Menu to select Fill Out.



⑥ Click on the Orange Skill in the training matrix section to open.

- Employee Rating - employee to rate their skill level from the drop-down box.



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

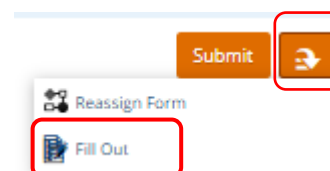


- Then, **Save** 
- Once all skills have been rated, select **Save**.
- Then select **Submit**. 
- The form will then be sent back to the manager for completion.

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.

⑦ The manager will then receive the form back to rank the top 5 skills that may require training.

- Click on the Task
- Click on the Action Menu, select **Fill Out**.
- Select the orange skills and rank the preference from 1 to 5. 1 being the first preference.
- Once these have been rated, click **Save**, then **Submit**.



With your manager please rank your top 5 using the ratings


Rank Top 5	First Preference	Second Preference	Third Preference	Fourth Preference	Fifth Preference
	1	2	3	4	5

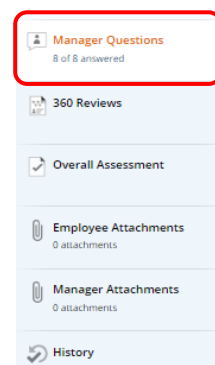
4.0 Employee Probation Process

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

4.1 Initial Assessment – Manager Questions

① Click on the Manager Questions Section in the Probation assessment (repeats steps '1.3' and '2' to enter into the employee probation process again if needed).

- Select the  **Answer** button on each Question.
- **Type** an answer in the Answer box (optional).
- **Select** a rating – (mandatory) selection.
- Select **Save and Next** to progress to the next question.



If you click on 'Save and Next' you will progress to the next question automatically. If you click on 'Save' only, you will then need to click on every question to answer them from the main 'Manager Questions' menu.

Manager Question Cancel Save Save and Next

^ Question

Question
Discuss the employees progress and performance.

More Information

Answer

Rating +

Rating	Description
1	Not Applicable
2	No
3	Yes

Advanced search



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.

② After the first four questions (generic questions relating to key documents), the manager will be asked another four questions relating to the employee's area of responsibility, agreed actions and target dates.

- **Answer** the question by addressing the criteria.
- **Rate** the priority of the agreed actions.
- Select **Save and Next**

< Manager Questions

Manager Question Cancel Save Save and Next

^ Question

Question
List a major area of responsibility and the agreed actions - A

More Information
Provide specific details of a major area of responsibility, and the agreed actions.

- Major area of Responsibility :
What are your goals for the next performance period (max 12 months)?
- Agreed Actions:
What action will you need to take place, and by whom to achieve these goals?
- Target Date:
Date that The Goal will be met.

Ratings indicate the priority of the agreed actions.
Note: If there are less than 4 agreed actions the rating will need to indicate (N/A - Not applicable)
Note: Make sure objectives are SMART - Specific, Measurable, Agreed, Realistic, Trackable and Timeframed.

Answer

Rating +
3 (Medium)



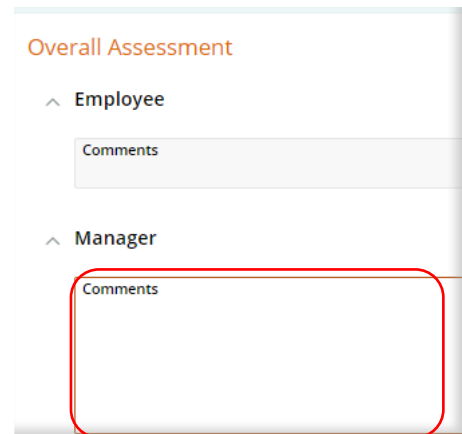
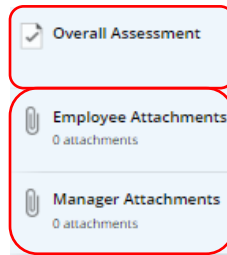
Note 1: Make sure objectives are SMART – Specific, Measurable, Agreed, Realistic, Trackable and Timeframed.
Note 2: If there are less than 4 agreed actions the rating will need to indicate (N/A - Not applicable)

Note: The City of Kwinana are not utilising 360 reviews (this has not been removed from the probation menu but is inactive).

4.2 Initial Probation Assessment – Overall Assessment

① Click on Overall Assessment

- Select **Edit**
- **Enter** a comment relating to the employee's overall performance
- Select **Save**
- The Manager or employee can add an attachment at any stage.



Once all questions have been answered and Overall Assessment has been completed:

②

- Select **Submit for Employee Sign-Off**
- This will send the Probation to the Employee for Review and Sign-Off.

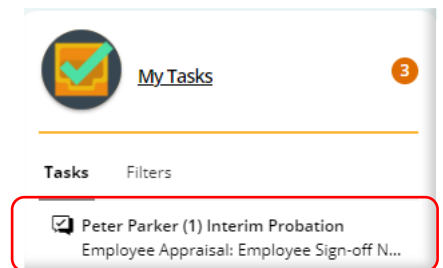
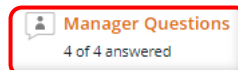
Submit for Employee Sign-Off

4.3 Initial Probation Assessment – Employee Sign-Off

①

The Employee will receive a Task and notification email to sign-off the Probation.

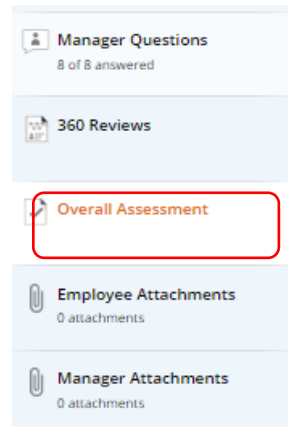
- **Click** on the task,
- Click **View Appraisal** to open the Probation.
- **Click** on Manager Questions.
- Review the Answers



An overall natural view of the Probation questions and answers can be found on the right-hand side of the screen or under the Summary Section of the Probation – depending on what size your screen is.

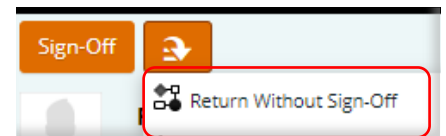
② Click on the Overall assessment section.

- Select **Edit**
- **Enter** a comment if applicable.
- Select **Save**



③ Employee Sign-Off

- 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 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.
 - The probation will be returned to the manager by email and task, this will prompt a conversation to be had with the Manager/Employee.
 - The manager can then review and make any changes agreed upon.

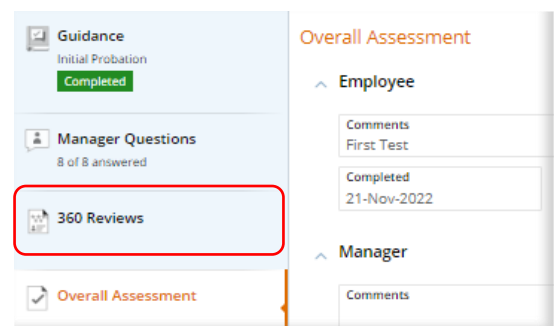


4.4 Initial Probation Assessment – Manager Sign-Off

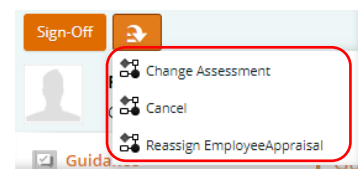
① The Manager will receive a task and email once the employee has signed-off, to complete the Probation assessment.

Click on the task

- Click **View Appraisal** to open the Probation.
- Review the **Overall Assessment** section (this is where the employee will enter their comment if applicable).
- Click **Sign-Off**
- The initial Probation assessment will now be **complete**.



- Or select **Change Assessment** from the action menu. This enables the manager to change the assessment, the Probation will then be sent back to the employee for reviewing and sign-off once more.

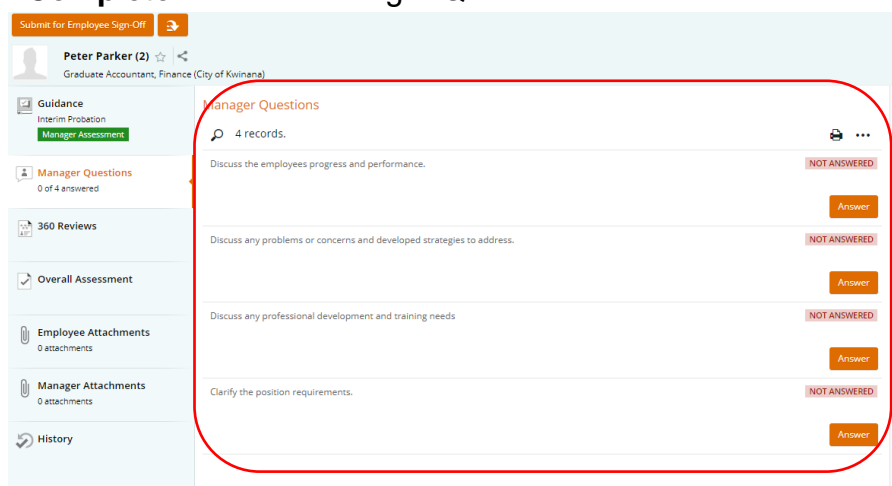


4.5 Interim & Final Probation assessments

- ① An **Interim Probation** assessment will be issued at **4 weeks**.
 - The manager will receive a new task and email to notify when this is due (as per section 1.3 of this User Guide above).
 - **Open** the Task or email.
 - **Follow** the same probation process instructions to complete this probation assessment (as per sections 4.1 to 4.4 of this User Guide above).

The Training Matrix form is NOT included in the Interim Probation assessment and only needs to be completed during the Initial Probation Process Assessment stage.

- **Complete** the four 'Manager Questions'.



- **Complete** the Overall Assessment and attach any document if needed.
- **Submit** the Interim Probation Assessment for employee sign-off followed by the final Manager sign-off.

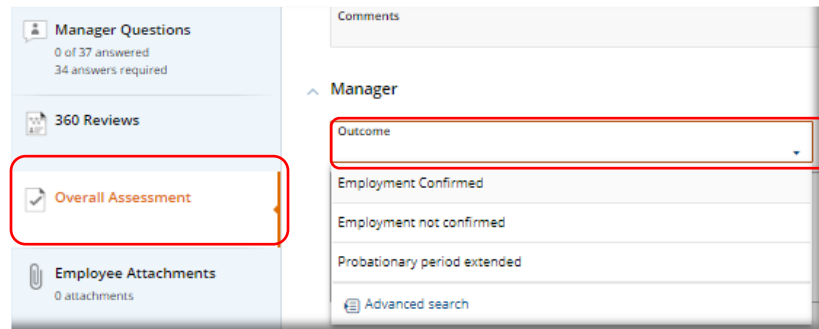
- ② A **Final Probation** assessment will be issued at **10 weeks**.
 - The manager will receive a new task and email to notify when this is due.
 - **Open** the Task or email.
 - **Follow** the same process instructions to complete the Final Probation assessment (as per sections 4.1 to 4.4 of this User Guide above).

The Training Matrix form is NOT included in the Final Probation assessment and only needs to be completed during the Initial Probation Assessment stage.


- **Complete** all 38 'Manager Questions'.

Note: The last 'Manager Question' asks whether the employee will pass their probation period. If the Manager wishes to extend the probation period or not confirm employment, this needs to be immediately discussed with HR and the relevant Director.


- **Complete** the Overall Assessment and attach any document if needed.
 - i. There is one additional step for the Final Probation assessment:
 - ii. Click on the **Overall Assessment** section.
 - iii. Click **Edit**
 - iv. Enter a comment as per the previous Probation assessments.
 - v. Click on the **Outcome** box, choose an outcome from the drop-down menu.

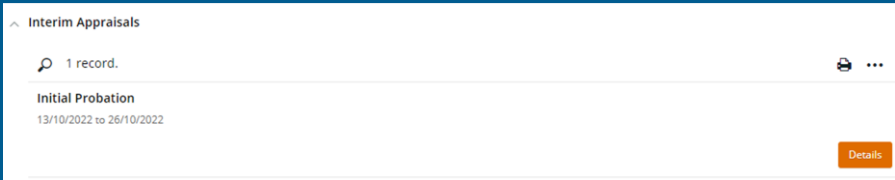


- **Submit** the Final Probation Assessment for employee sign-off and comment.
- Once the employee has signed off the Final Probation Assessment, the Manager will receive another task/email notification in OneCouncil.
 - **Open** the Final Assessment.
 - Click on the **Overall Assessment** section.
 - **Review** the employee's comment.
- Click **Save**.
- Click **Submit** for Employee Sign-Off.
- Once the Final Probation assessment has been signed off, the Probation will automatically be sent to the Director via an email and task to sign off and approve.

 If a Manager and Director wishes to extend an employee's probationary period, the HR Manager will need to be consulted prior to advising the employee. If a probation period is to be extended, it should be clearly evident that the employee is not performing adequately – this should be discussed with the employee at all stages of the probation period.

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

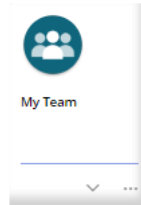
 If there are other interim Probations completed, you will find a copy of the comments from these meetings in Overall Assessments. Click on Details to view these.



FAQs

As a Manager, where can I view each stage of my employees completed Probation?

- ① Select the My TEAM function Tile.

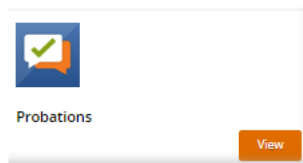


- ② Select Team Analysis



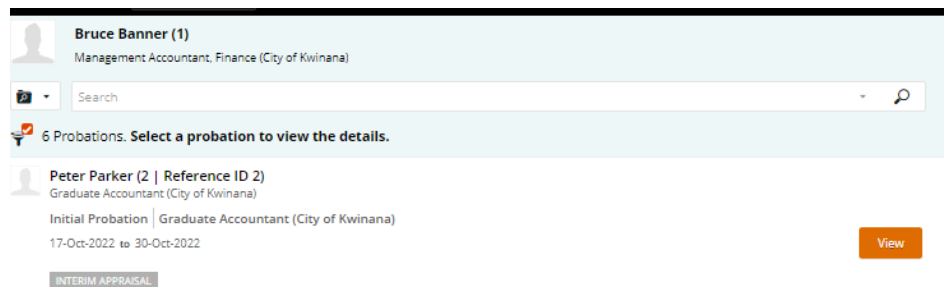
- ③ Select the Probations tile

- Click on View

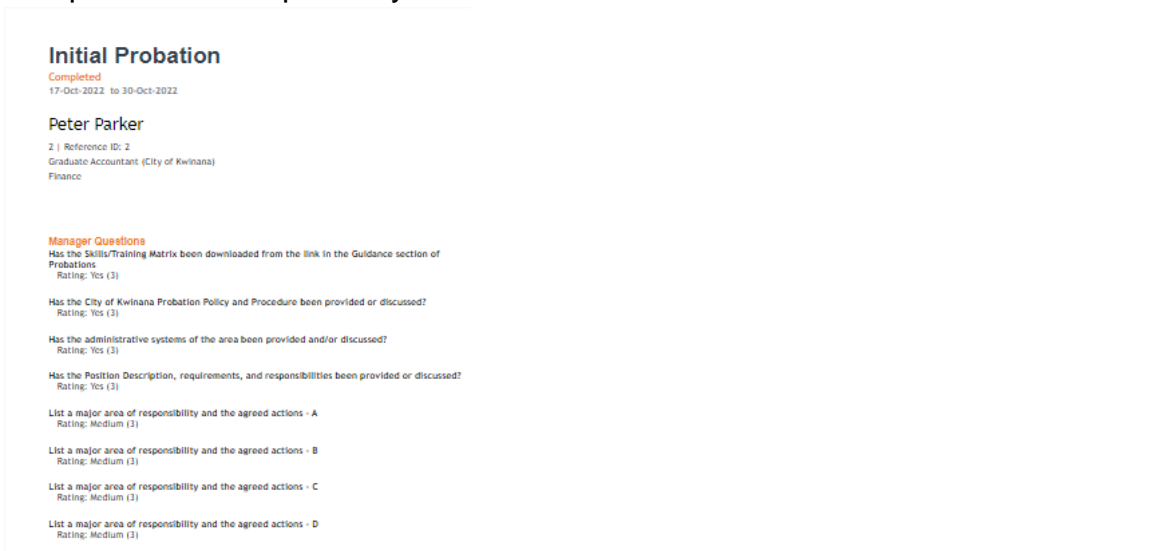


- ④ This will display all your employees' probations.

- Click on the Probation you would like to view.
- Click view.

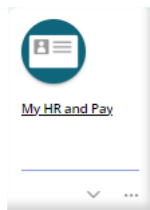


- ⑤ The probation will open for you to view.

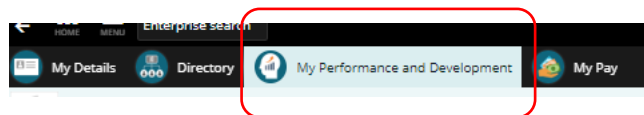


As an Employee where can I view my completed Probation?

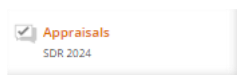
- ① Select My HR & Pay function tile.



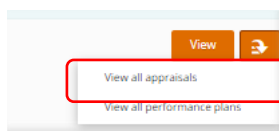
- ② Select My Performance & Development.



- ③ Select Appraisals



- ④ Click on the Action Menu
- Select View all Appraisals

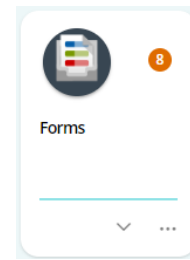


- ⑤ All Appraisal will be displayed here.
- Select the Appraisal you would like to view
 - Click on View  to open appraisal.

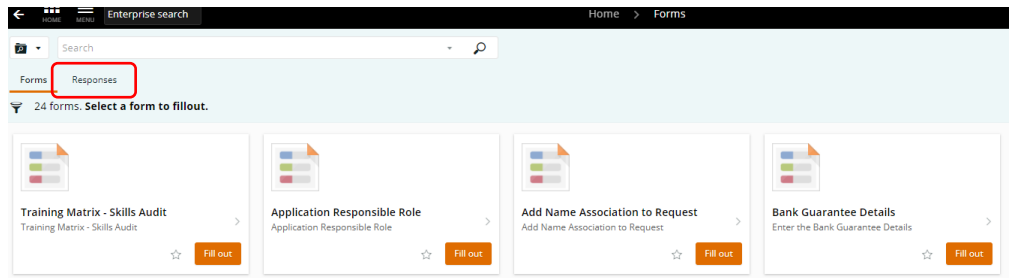


As a Manager, where can I view completed Training Matrix/Audit forms?

- ① In OneCouncil, click on Forms in your home page.



- ② Select Responses



- ③ Select the Training Matrix form that you have previously submitted (Note: previously submitted forms can be identified by being labelled "Submitted")



- ④ Select View



There is an option to download the completed form by clicking on the drop down menu

