Employee Probation

About this automation:

Use this process to send a reminder task and create documents required for employee probation period review.

⚙️ Simply import the sample automation, customise to suit your practice, test and activate!

Performance & Development Program

Employee name:	«ClientName»
Position:	«FYI_custom_Employee_Role»
Manager:	«Managers»
Review date:	To be scheduled shortly

Review

The employee should complete the questions performance feedback prior to the appraisal meeting, then submit to their leader. The leader will add their comments to feedback provided by the employee. This is an opportunity to provide feedback, set goals for the next 6 months and discuss career aspirations.

1. **Overall, how are you going in your role?**
   What areas of your job do you enjoy? What areas do you enjoy the least? Do you have any roadblocks or concerns?
   Employee Comments:

2. **What do you think you do well?**
   Employee Comments:

   Manager comments/feedback:

3. **What areas do you think you could improve?**
   Reflect on tasks/projects/areas of your job that have not been as successful or have room for development
   Employee Comments:

What's included:

- ✅ Probation performance Review Document & Email Templates
- ✅ Automation Process Steps

FYI: Employee Probation Period 🕐
This process will trigger the probation documents and meetings required to review employee performance over the course of their first 6 months with the practice.

Knowledge

Templates · Directors Files & Papers · Knowledge Base · Policies & Procedures · Task Templates

Type	Template Name	Name	Modified by	Modified on ↓	Status
✉️	FYI: Probation Confirm...	FYI: Probation Confirm...	Cathy Woods	09 Feb 2024 15:43	Active
📄	FYI: Probation Passed ...	FYI: Probation Passed C...	Cathy Woods	09 Feb 2024 15:30	Active
📄	FYI: Performance and ...	FYI: Performance and D...	Cathy Woods	09 Feb 2024 15:26	Active
✉️	FYI: Your first 6 Months	FYI: Your first 6 Months	Cathy Woods	09 Feb 2024 15:21	Active

Step	Application	Action	
#1	FYI Actions	**Create Meeting** • A meeting will be created • The document will be filed as "6 Month Probation Review" in the Employees cabinet • A task will be created with the subject "Schedule 6 month review with employee" *Notes* *Consider updating the task assignee to the appropriate User or User Role*	✏️
#2	FYI Actions	**Create Word** • A Word document will be created from the "FYI: Performance and Development Program Template" template • The document will be filed as "FYI: Performance and Development Program Template" in the Employees cabinet • A task will be created with the subject "Review and complete P&D document for probation period meeting" *Notes* *Consider updating the task assignee to the appropriate User or User Role*	✏️
#3	FYI Actions	**Create Email** • An Email will be created from the "FYI: Your first 6 Months" template ○ Created email will be **immediately** sent • The document will be filed as "FYI: Your first 6 Months" in the Employees cabinet *Notes* *Consider updating the sender of the email and task assignee to the appropriate User or User Role*	✏️

How to import:
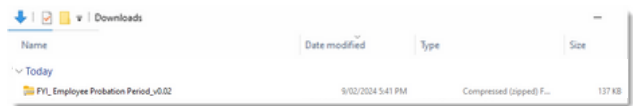
Before you begin - ensure your **Employee View** has been saved.
- Employee Status = Active

Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You **do not** need to extract the files.
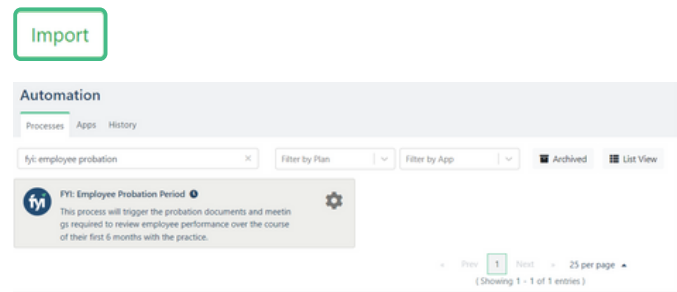
Step 2 - Import the files into FYI

Navigate to the **Automations** screen and click the **Import** button on the right-hand side of the screen.

Locate and select your saved "Employee Probation Period" file and click **Open** to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.

## Step 3 - Review the process

Review the Templates
Locate the templates in **Knowledge** - **Templates**. The templates will import with the prefix FYI making them easy to locate.

- Review and personalise the imported templates
- Update the template **Status** to Active.

Edit and Review Each Process Step
The Custom Process is imported with the **Status** set to Draft. You can locate the process by searching in the "Search processes" field.

- Review the schedule and owner
- Review and update each **process step.** Specific comments have been added to the steps where action is required. These will display in blue.
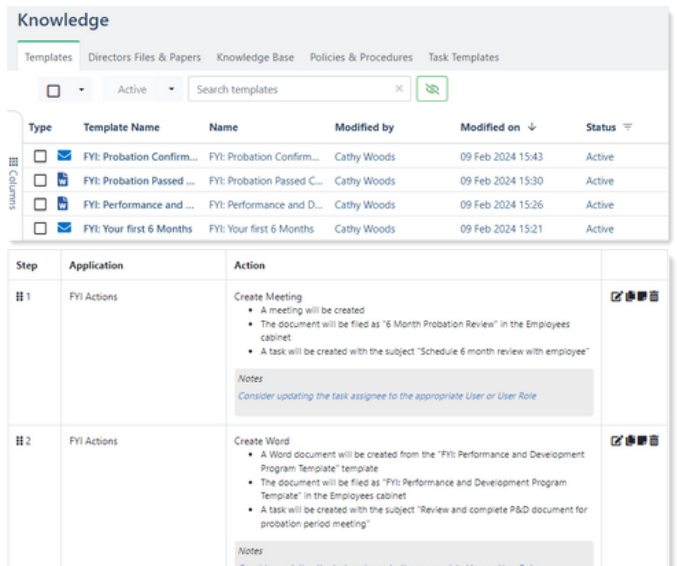
Step 4 - Test and run the automation

Click the **Test** button to display a list of Employees.

From Select Test Employee, search and select a specific employee to run the test for and select **Run Test**. A Test Employee is handy for testing scheduled automations.

Review the test by clicking the **View History link**, or from the Employee workspace.

When ready, set the **Status** to Active. The process will run automatically according to the schedule.