Employee Probation Process Automation

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:	«Manager»
Review date:	To be scheduled shortly

Review

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

 Overall, how are you going in your row? What areas it your job do you enjoy? What areas do you enjoy the least? Do you have any readdocks or concerns?
 Employee Comments:

 What do you think you do well' Employee Comments:

3. What areas do you think you could improve?

Reflect on tasks/projects/areas of

What's included:

 Probation performance Review Document & Email Templates
 Automation Process Steps

FYI: Employee Probat	ion Period	-	Kn	owl	edge				
		U	Теп	nplates	Directors Files & Papers	Knowledge Base Poli	cies & Procedures	Task Templates	
	er the probation documents and meetin								
	employee performance over the course				 Active Set 	arch templates	×	R.	
first 6 months	with the practice.		Ту	pe	Template Name	Name	Modified by	Modified on \downarrow	Status =
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					FYI: Your first 6 Months	FYI: Your first 6 Months	Cathy Woods	09 Feb 2024 15:21	Active
_	eClientNames								
	«FYI_custom_Employee_Role» eManagers		Step		Application	Action			
	To be scheduled shortly		H 1		FYI Actions	Create Meeting			K B B B
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How to import:

Before you begin - ensure your **Employee View** has been saved.

• Employee Status = Active

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ctivity Reports Time Invoices (n	iployees			
Active Employees	Search employees ×			
Name	Email	Partner	Manager	Active 👻
Carl Davies	carl.davies@thegrowth.partners	Olivia Williams		0
Cathy Woods	cathy woods@thegrowth.partners	Harry Spins	Liz Hurst	0
		Crystal Rich		

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.

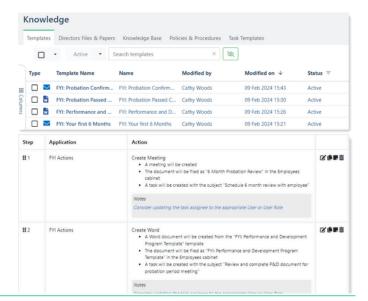
From Select Test Employee, search and select a specific employee to run the test for and select Run Test. A Test Employee is handy for testing scheduled automations.

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.

	~			
Name	Date modified	Type		Size
~ Today				
PYI_Employee Probation Period_v0.02	9/02/2024 5:41	PM	Compressed (zipped) F	137 KE





Select Test E	Imployee
Employee Name	
Ignore Process Filter	NO
	Employee
0	Aaron Test
0	Amanda Bailey
0	Anna Jordan