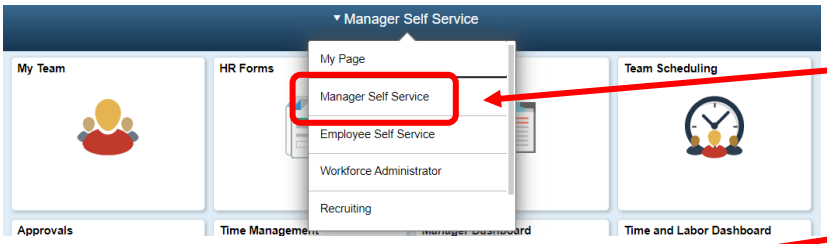
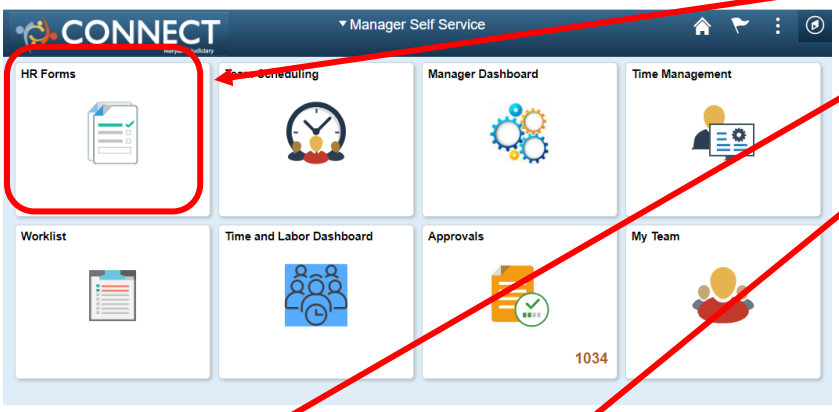
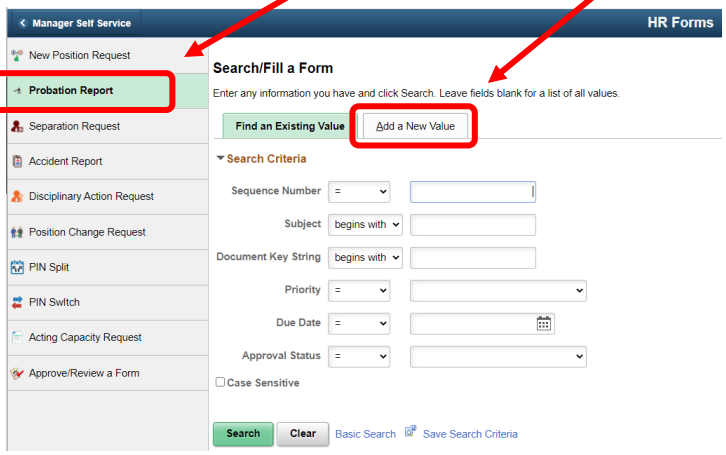
1 How to Complete a Probation Report

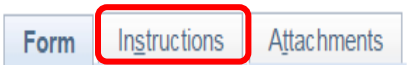






1. Once logged into CONNECT, click “Manager Self Service” from the page menu.
2. Click the “HR Forms” tile.
3. Click “Probation Report” from the left panel.
4. Click the “Add a New Value” tab. This will open to the form.

PROBATION REPORT INSTRUCTIONS - To view complete instructions, Click the "Instructions" Tab.



Probation Report

The online form and any attachments must be submitted to the Judiciary Human Resources Department on or before the probation period end date to be included in the employee's personnel record. If the probation report is not completed and provided to the employee on or before the specified probation expiration date the probation period will end by default automatically.

The following information is required in order to complete the probation report.

Employee ID: Managers can find the employee ID number for direct reports on the Manager Dashboard under Manager Expiration Dates.

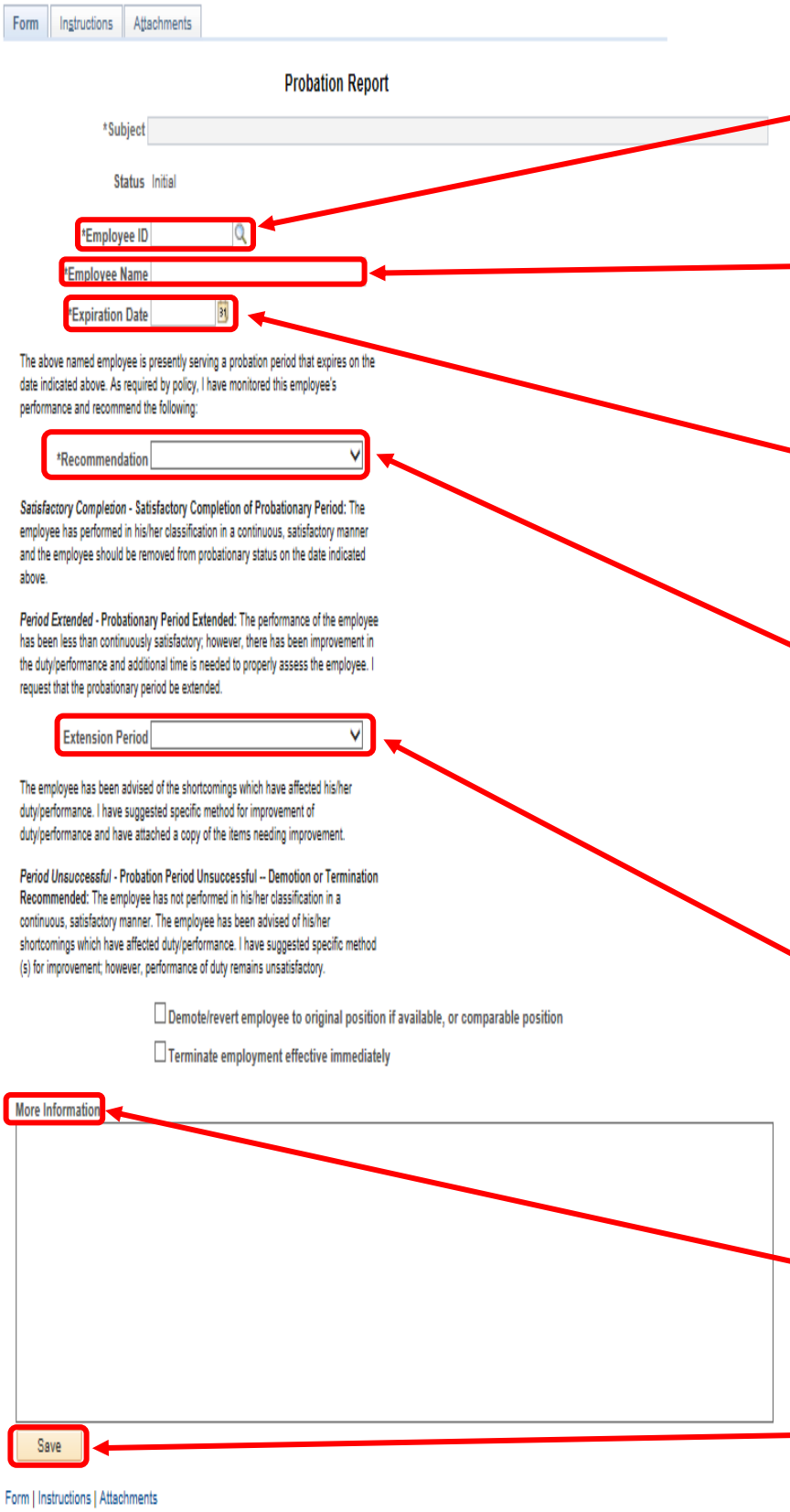
Probationary Period End Date: The probation period end date for the employee is located on the Manager Dashboard under Manager Expiration Dates.

Complete the following sections of the probation report.

Form Tab: Click on the Form Tab

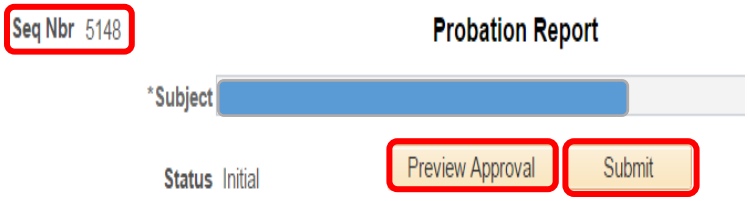
1. **Subject:** The system will default this information using the employee's name and work location once the employee id is selected. The subject line will help to track the transaction.
2. **Employee ID:** Enter the employee ID
   - Click on the search icon
   - Look up employee ID by entering employee name
   - Click on the employee ID number to add
5. **Employee Name:** The employee name will default once the employee id is selected.
6. **Expiration Date:** Enter the date the probationary period will expire.
7. **Recommendation:** Select one of the items listed in the dropdown box.
   - Period Extended
   - Period Unsuccessful
   - Satisfactory Completion
8. **Extended Period:** If the probation period is being extended, select the number of days to extend from the dropdown box.
   - 30 Days
   - 60 Days
   - 90 Days
   - 120 Days
   - 150 Days
   - 180 Days
9. **Period Unsuccessful:** if the probationary period is unsuccessful select one of the options listed.
   - Demote/revert employee to original position if available, or comparable position
   - Terminate employment effective immediately
10. **Save:** Click the save button
11. **Submit:** Click the submit button

Form | Instructions | Attachments



After reviewing the "Instructions":

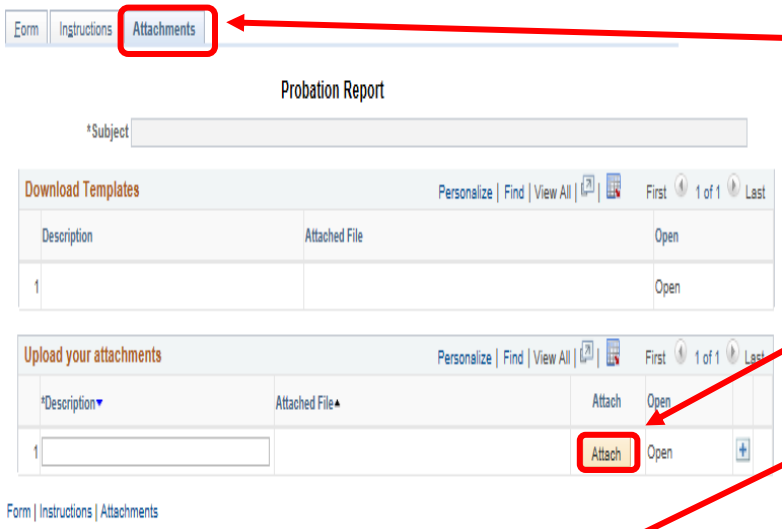
5. Enter Employee ID or click the search icon to find the Employee ID Number.
6. Hit the TAB button on the keyboard. The Employee Name will auto populate along with the Subject Line.
7. Expiration Date – This can be found on the Manager's Dashboard under the "Employment Related Exp Dates" pagelet.
8. Recommendation - Click the drop-down menu and select the option that applies:
   A. **Period Extended**
   B. **Period Unsuccessful**
   C. **Satisfactory Completion**
9. Extension Period - If extending a probation period, click on the drop-down menu and select the appropriate extension period.
10. More Information - Provide any necessary details in this area.
11. Click "Save".



Upon clicking the "Save" button, the top of the Probation Form will show a Sequence Number, a Preview Approval button and Submit button.

The Preview Approval will show you the approval path for the probation form.

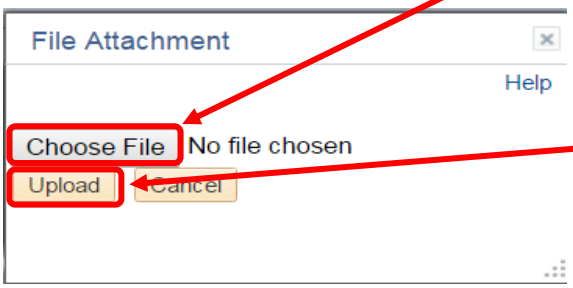
Submit will submit the probation form for Approval.



12. Before submitting for approval click the Attachments tab to attach any supporting documentation (i.e. extending probation).

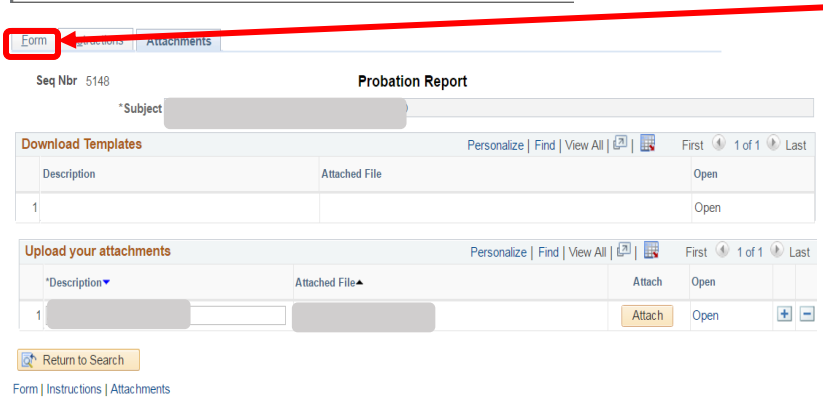
13. Click "Attach" to open the File Attachment box.

14. Click "Choose File" to search your computer for the file you saved for the probation report (Save as a PDF).

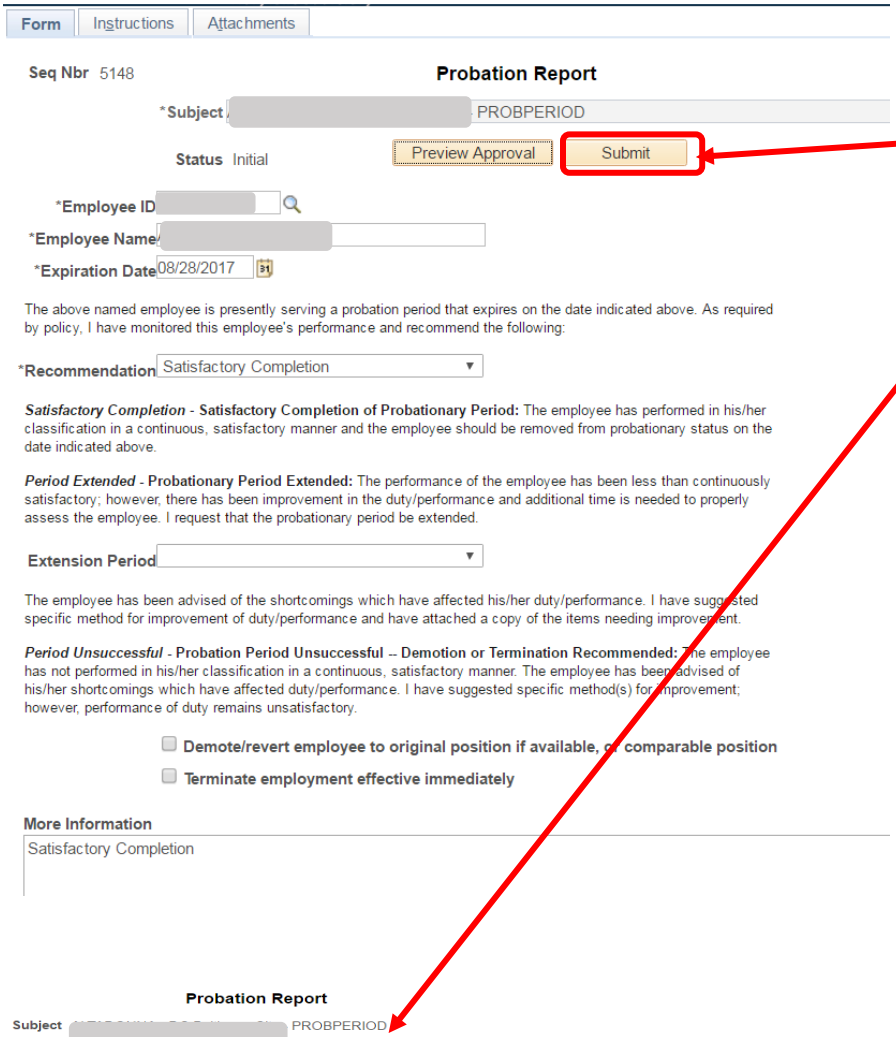


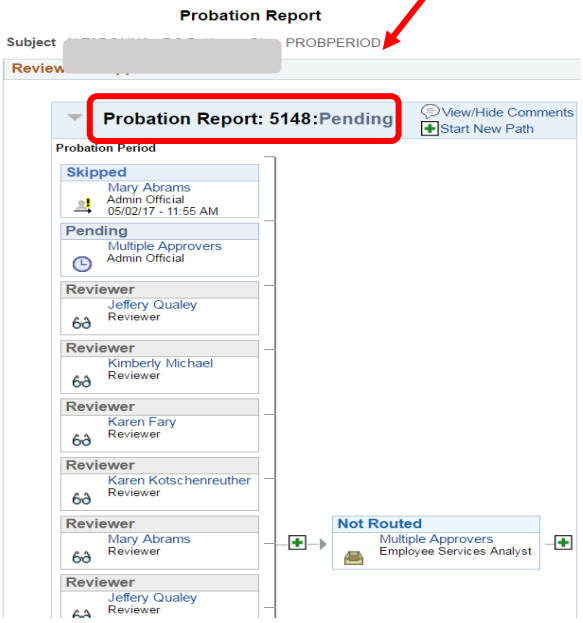
15. When you have located the file, double click on the file name to attach it.

16. Click "Upload" to upload the PDF document to the probation form.



17. Click the "Form" tab to return to the main page.





You should now be back on the Probation Report page.

18. Click "Submit" to send for approval.

19. Upon submitting, you will see that the report is pending approval, and who it is routing to for approval.