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.

| Form | Instructions | Attachments |

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

| Form | Instructions | Attachments |

Probation Report

*Subject

Status Initial

*Employee ID 🔍

*Employee Name

*Expiration Date 📅

The above named employee is presently serving a probation period that expires on the date indicated above. As required by policy, I have monitored this employee's performance and recommend the following:

*Recommendation ⌄

Satisfactory Completion - Satisfactory Completion of Probationary Period: The employee has performed in his/her classification in a continuous, satisfactory manner and the employee should be removed from probationary status on the date indicated above.

Period Extended - Probationary Period Extended: The performance of the employee has been less than continuously satisfactory; however, there has been improvement in the duty/performance and additional time is needed to properly assess the employee. I request that the probationary period be extended.

Extension Period ⌄

The employee has been advised of the shortcomings which have affected his/her duty/performance. I have suggested specific method for improvement of duty/performance and have attached a copy of the items needing improvement.

Period Unsuccessful - Probation Period Unsuccessful – Demotion or Termination Recommended: The employee has not performed in his/her classification in a continuous, satisfactory manner. The employee has been advised of his/her shortcomings which have affected duty/performance. I have suggested specific method (s) for improvement; however, performance of duty remains unsatisfactory.

☐ Demote/revert employee to original position if available, or comparable position

☐ Terminate employment effective immediately

More Information

[text box]

Save

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".

Seq Nbr 5148

Probation Report

*Subject

Status Initial

Preview Approval   Submit

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.

Form Instructions Attachments

Probation Report

*Subject

Download Templates   Personalize | Find | View All | 🗗 | 🖪   First 🕢 1 of 1 🕟 Last

Description	Attached File	Open
1		Open

Upload your attachments   Personalize | Find | View All | 🗗 | 🖪   First 🕢 1 of 1 🕟 Last

*Description▼	Attached File▲	Attach	Open
1		Attach	Open ➕

Form | Instructions | Attachments

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.

File Attachment   ✕

Help

Choose File No file chosen
Upload   Cancel

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

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

Form Instructions Attachments

Seq Nbr 5148   **Probation Report**

*Subject

Download Templates   Personalize | Find | View All | 🗗 | 🖪   First 🕢 1 of 1 🕟 Last

Description	Attached File	Open
1		Open

Upload your attachments   Personalize | Find | View All | 🗗 | 🖪   First 🕢 1 of 1 🕟 Last

*Description▼	Attached File▲	Attach	Open
1		Attach	Open ➕ ➖

🔁 Return to Search

Form | Instructions | Attachments

| Form | Instructions | Attachments |

Seq Nbr 5148   **Probation Report**

*Subject ▢▢▢▢▢▢▢▢   PROBPERIOD

Status Initial   [Preview Approval]   [Submit]

*Employee ID ▢▢▢▢▢ 🔍
*Employee Name ▢▢▢▢▢▢
*Expiration Date 08/28/2017 📅

The above named employee is presently serving a probation period that expires on the date indicated above. As required by policy, I have monitored this employee's performance and recommend the following:

*Recommendation Satisfactory Completion   ▼

Satisfactory Completion - Satisfactory Completion of Probationary Period: The employee has performed in his/her classification in a continuous, satisfactory manner and the employee should be removed from probationary status on the date indicated above.

Period Extended - Probationary Period Extended: The performance of the employee has been less than continuously satisfactory; however, there has been improvement in the duty/performance and additional time is needed to properly assess the employee. I request that the probationary period be extended.

Extension Period _____   ▼

The employee has been advised of the shortcomings which have affected his/her duty/performance. I have suggested specific method for improvement of duty/performance and have attached a copy of the items needing improvement.

Period Unsuccessful - Probation Period Unsuccessful -- Demotion or Termination Recommended: The employee has not performed in his/her classification in a continuous, satisfactory manner. The employee has been advised of his/her shortcomings which have affected duty/performance. I have suggested specific method(s) for improvement; however, performance of duty remains unsatisfactory.

☐ Demote/revert employee to original position if available, or comparable position

☐ Terminate employment effective immediately

More Information

Satisfactory Completion

                    Probation Report

Subject ▢▢▢▢▢▢▢ PROBPERIOD

Review

| ▾ | **Probation Report: 5148:Pending** | 💬 View/Hide Comments ➕ Start New Path |

Probation Period

Skipped
Mary Abrams
Admin Official
05/02/17 - 11:55 AM

Pending
Multiple Approvers
Admin Official

Reviewer
Jeffery Qualey
Reviewer

Reviewer
Kimberly Michael
Reviewer

Reviewer
Karen Fary
Reviewer

Reviewer
Karen Kotschenreuther
Reviewer

Reviewer
Mary Abrams
Reviewer

Reviewer
Jeffery Qualey
Reviewer

Not Routed
Multiple Approvers
Employee Services Analyst

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.