



Parliamentary
and Health Service
Ombudsman

Probation policy & procedure

Version 0.1 | June 2023

1 Policy

We want to give colleagues who join PHSO every opportunity to succeed in their new role. This means clear and regular communication and feedback with clarity of expectations and the right support and guidance to help achievement in role. The organisation believes that the use of probationary periods increases the likelihood that new colleagues will perform effectively in their role. The length of probationary period is ten months.

Who this policy applies to

This policy and procedure applies to all permanent and fixed-term colleagues. It does not cover consultants or agency staff. This policy is not part of the employment contract and may be amended at any time in line with legislation or to reflect best practice.

2 Ongoing feedback and support

Colleagues should receive on-going feedback throughout their career at PHSO, however more so during their probationary period. Regular 121s support this two way feedback so there is a clear understanding of what is going well and any areas where improvement is needed and additional training and support may benefit.

If managers have any concerns about a new colleague's performance, conduct or attendance, they should not wait for a probationary review but should discuss things informally with the colleague as soon as possible and agree the steps they need to take to improve.

2.1 Probationary review meetings

As well as regular 121 discussions, probationary review meetings should take place during the probationary period. These reviews are a structured opportunity to talk about progress, and make sure both parties are happy with how things are going, identifying and recording any actions that will support the success in role.

Review meetings should happen:

- First Probationary Review meeting - at around five months
- Final Probationary Review meeting - at around nine months

Probationary Review meetings can be held at an earlier point if there are serious concerns that haven't been resolved informally.

A first Probationary Review meeting should be recorded using the [Probationary Review Form](#).

Final Probationary Review meeting

At the end of the probationary period, ideally colleagues are successful in their new role. A final probationary review meeting will take place to discuss this.

If all has gone well, successful outcomes should be recorded using the [Probationary Review Form](#), then sent to [HR via HelpHub](#) who will confirm successful completion of the probationary period in writing.

An extension to a probationary period may happen in circumstances where performance, conduct or attendance has not been entirely satisfactory, but it is thought likely that an extension may lead to an improvement.

Extensions will usually be for two months.

If an extension is confirmed, the manager should reflect the conversation on the [Probationary Review Form](#), detail any action plan or support and confirm the extension in writing. All documents are then sent to the colleague and a copy to [++HRSharedServices](#).

At the end of an extension period, if all is satisfactory another final probationary review meeting will be arranged, and employment confirmed. Managers should reflect the conversations on the [Probationary Review Form](#), and then send to [++HRSharedServices](#) who will confirm this in writing.

2.2 Consideration of dismissal

At a final probationary review, in the event that the line manager believes it is unlikely that the colleague will meet the required standards for the role, this should be clearly discussed, reflecting on previous conversations and expected standards.

A decision can be made to end the colleague's probationary contract of employment. To ensure full consideration and discussion a formal meeting will be arranged where the probationary contract is considered. As this is a formal meeting, the line manager will first discuss with HR and the colleague will be invited in writing and will receive five days' notice. They can be supported by a colleague or union representative.

At the meeting the manager will clearly set out the reasons why the colleague has not reached expected level of performance, attendance or conduct, and will give the employee the opportunity to present their case including any mitigating circumstances.

The outcome including if a decision to dismiss, will be given verbally and also in writing, this will include the right of appeal.

Appeals should be sent in writing to [++HRSharedServices](#) within five working days of receiving the decision letter, setting out the grounds of appeal. An appeal meeting will be arranged, colleagues will be invited in writing, and can be supported by a work colleague or union representative.

Outcomes will be given within five working days, should this not be possible, the appeal manager will keep the colleague informed and will do all they can to communicate the outcome as soon as is practicable.

Related policies and guidance:

[Employee Assistance Programme \(EAP\)](#)
[Code of Conduct](#)
[Wellbeing Hub](#)

Version control

Date	Author	Version	Content/changes made	Review and Approval
June 2023	HR Business Partner	1.0	New P&P	AD of People and Talent

Review Date

Date	Owner of review
April 2026	HR Business Partner