

Hannah Mercer
HR Generalist
Employer HR file

Date: 14 July 2026
Our Reference: POR/A2A492CB
Document Type: HR record

Probation Outcome Record

1. CASE SUMMARY

This document summarises the outcome of Hannah Mercer's probationary period as an HR Generalist at HRHeaven QA Sample Employer, based in the Cambridge office with remote HR team support. The probation period ended on 22 January 2025 and a review meeting was held to assess performance and suitability for continued employment in the role. The probation has been formally confirmed with specified follow-up development actions.

2. BACKGROUND

Hannah Mercer joined HRHeaven QA Sample Employer under the probation and performance arrangements outlined in the Probation and Performance Review Procedure v2.1. Throughout the probation period, Hannah demonstrated reliable and thorough casework within her role. The Cambridge office team, augmented by remote HR support, has managed her induction and work assignments.

HR RECORD DETAILS

Employee
Hannah Mercer

Role
HR Generalist

Case type
Probation Confirmation

Reference
HRA-A2A492CB

KEY DATES

Completed
14 July 2026

Owner
Tom Richardson

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3. INFORMATION CONSIDERED

The probation review meeting was conducted on 22 January 2025. Management observations noted Hannah's dependable performance but highlighted areas for growth, specifically regarding clearer handover protocols for onboarding sessions and establishing a more consistent cadence for analytics reporting.

Supporting documents reviewed include training logs, onboarding metric exports, HRIS ticket history, and minutes from the probation review meeting held on 22 January 2025.

Hannah welcomed the confirmation of her probation completion and concurred with the proposed development actions. Her positive engagement with the feedback was noted.

Support provided during probation comprised access to relevant course subscriptions, weekly one-to-one coaching sessions with the HR Director, and temporary administrative assistance during system migration.

4. DECISION

Following the completion and review of Hannah's probation period, the decision was made to confirm her appointment as an HR Generalist. This decision is subject to the successful completion of the agreed follow-up actions to support her ongoing development.

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5. REASONS

The probation period established that Hannah consistently delivered reliable and diligent work within her scope of responsibilities. However, management identified opportunities to enhance the delegation and handover of onboarding tasks to improve operational efficiency.

Further, the need to strengthen the analytical reporting function was recognised, with expectations set for Hannah to complete an intermediate HR analytics course and enhance the workforce reporting process.

Hannah's commitment to personal development and her proactive approach during probation contributed positively to the confirmation recommendation.

6. FOLLOW-UP ACTIONS

1. Completion of the intermediate HR analytics course, with a requirement to produce the first workforce report by 15 April 2025. Hannah will be responsible for this action.

2. Implementation of a delegation plan for onboarding tasks, including the identification of at least one deputy to support these activities. The deadline for appointing a deputy is 1 March 2025. Hannah has committed to confirming her deputy by 29 February 2025.

Oversight for these actions will be provided by Tom Richardson, ensuring progress and providing support as necessary.

The next formal review to assess progress on these follow-up actions is scheduled for 1 March 2025.

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7. AUDIT INFORMATION

Document reference: HRA-A2A492CB

Date of probation confirmation: 14 July 2026

Probation review meeting date: 22 January 2025

Decision authority: Management of HRHeaven QA Sample Employer

Policy referenced: Probation and Performance Review Procedure v2.1

Document issued to employee as a PDF via email.

The employee's written acceptance of the follow-up actions is appended to this record. Employers should verify that the acceptance is attached prior to filing.

Action owner: Hannah Mercer (development tasks) with oversight by Tom Richardson.

Next review date diarised for 1 March 2025.