

Marcus Finch
Operations Manager
Employer HR file

Date: 14 July 2026
Our Reference: EPC/B829B1ED
Document Type: Checklist

Probation Outcome Checklist

1. EXECUTIVE SUMMARY

This checklist summarises the key tasks and actions required to successfully complete the probation period for Marcus Finch, Operations Manager, as of 14 July 2026.

A probation review took place on 10 July 2025, assessing progress against agreed objectives including vendor consolidation, procurement turnaround and the implementation of a new term-time rostering system.

The vendor consolidation objective was achieved; procurement turnaround was partially met; and the rostering system project has been delayed due to IT integration challenges. These factors were discussed to identify causes and plan ongoing support.

The decision is to complete this probation stage with a follow-up review scheduled for 10 October 2025.

This document serves to guide the employer and reviewing manager through the essential procedural steps to close the probation period while ensuring compliance with internal policies and HR best practices.

CHECKLIST DETAILS

Employee
Marcus Finch

Role
Operations Manager

Case type
End Probation

Reference
HRA-B829B1ED

KEY DATES

Completed
14 July 2026

First review
10 July 2025

Continued
Probation Outcome Checklist

2. PROBATION REVIEW COMPLETION TASKS

Task: Review and confirm probation outcome facts and status.

Owner: Assigned HR lead or line manager responsible for probation oversight.

Priority: High

Due date: Immediate

Evidence required: Meeting notes from 10 July 2025 review, documented objectives, any correspondence on performance and support plans.

Status: Pending

Completion notes: Verify accuracy of objectives reviewed and outcome stated before proceeding.

Follow-up Action Plan

Action	Owner	Due Date	Evidence Required	Status
Review the probation outcome record and confirm it reflects the agreed facts.	HR	10 July 2025	Completion note or supporting evidence	Open
Probation Outcome Follow-up is due on 10 October 2025.	HR	10 July 2025	Completion note or supporting evidence	Open
Record a clear owner and review point for the probation outcome.	HR	10 July 2025	Completion note or supporting evidence	Open
Review the End Probation record for missing facts, evidence, follow-up ownership or review safeguards before completion.	HR	10 July 2025	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	HR	10 July 2025	Completion note or supporting evidence	Open
File the final documents in the employee's personnel record.	HR	10 July 2025	Completion note or supporting evidence	Open

Continued

Probation Outcome Checklist

3. PROBATION OUTCOME DOCUMENTATION

Task: Finalise and archive probation outcome documentation in Marcus Finch's personnel file.

Owner: HR Administrator or designated record keeper.

Priority: Medium

Due date: 14 July 2026

Evidence required: Signed probation review summary, any supporting evidence of performance or mitigation plans.

Status: Not started

Completion notes: Confirm all necessary documents are complete, factually accurate, and appropriately authorised prior to filing.

4. PROBATION OUTCOME COMMUNICATION

Task: Communicate the probation outcome to Marcus Finch in a clear, documented manner.

Owner: Line Manager or HR Business Partner.

Priority: High

Due date: 14 July 2026

Evidence required: Copy of formal notification, acknowledgment of receipt by employee if applicable.

Status: Not started

Completion notes: Tailor communication to reflect discussed facts and planned follow-up; ensure opportunity for employee feedback.

Continued

Probation Outcome Checklist

5. SCHEDULE AND PREPARE FOLLOW-UP REVIEW

Task: Plan the probation outcome follow-up review for 10 October 2025, addressing partially met and delayed objectives.

Owner: Line Manager.

Priority: Medium

Due date: 10 October 2025

Evidence required: Follow-up meeting agenda, updated objectives progress records, support plan documentation.

Status: Overdue

Completion notes: Initiate preparations immediately to address delayed follow-up and maintain support continuity.

6. COMPLIANCE AND RISK REVIEW

Task: Conduct a final compliance check confirming adherence to internal policy and legal standards before closing probation.

Owner: HR Lead or Compliance Officer.

Priority: High

Due date: Prior to probation completion date.

Evidence required: Review notes on procedural correctness, risk assessments or flags related to probation ending.

Status: Pending

Completion notes: Consult relevant policies and ensure all safeguarding steps are completed, noting that no legal advice is provided herein.

Continued

Probation Outcome Checklist

7. AMENDMENT LOG

Record any changes made to this checklist or probation outcomes after the initial completion date.

Owner: HR Administrator

Priority: Low

Due date: As necessary

Evidence required: Documentation of amendments with dates and reasons.

Status: Open

Completion notes: Maintain a clear log for audit trail continuity.