

Oliver Bennett
Finance Analyst (Contractor)
Employer HR file

Date:14 July 2026
Our Reference:PRR/8EF9BA1C
Document Type:HR record

Probation Review Record

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 CASE SUMMARY

This document summarises the probation review outcome for Oliver Bennett, working as a Finance Analyst (Contractor) within the Finance team supporting clinic operations at the Leeds community health hub. The current probationary period was due to end on 31 January 2025.

Following a thorough review, a probation extension has been agreed, extending the probation period to 30 April 2025. This decision reflects the need for further assessment of Oliver's performance in key areas alongside specific support measures, with a follow-up review scheduled for 15 April 2025.

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 BACKGROUND

Oliver Bennett joined HRHeaven QA Sample Employer as a Finance Analyst (Contractor), working primarily in the Finance team that supports clinic operations at the Leeds community health hub.

The role involves hybrid working, with two days per week in the office. The probation period commenced prior to 31 January 2025, initially set to conclude at that date in accordance with the organisation's Probation and Fixed-Term Worker Policy v3.1.

During the probation period, Oliver received informal feedback in November 2024, including coaching support and mandatory training access.

The purpose of this review was to evaluate overall performance and determine suitability for continued employment beyond probation.

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 HR RECORD DETAILS

Employee

Oliver Bennett

Role

Finance Analyst (Contractor)

Case type

Probation Extension

Reference

HRA-8EF9BA1C

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 KEY DATES

Completed

14 July 2026

Final review

30 April 2025

Owner

Priya Desai (Finance Lead)

Continued

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3. INFORMATION CONSIDERED

Manager observations noted that while Oliver demonstrates strong accuracy in financial tasks, there is inconsistency in stakeholder-facing delivery and meeting deadlines.

A proposal has been made for weekly 30-minute check-ins and appointing a mentor from the senior analyst team to support Oliver's development.

Oliver has acknowledged the need for clearer expectations and requested specific measurable objectives, examples of required storytelling, and confirmation of available training days.

Supporting materials reviewed include probation review notes, email threads from December 2024 to January 2025, versioned reports with timestamps, and training completion certificates.

Previous support during probation comprised informal verbal feedback, a coaching session on 5 December 2024, and completion of standard mandatory training.

4. DECISION

After consideration, the decision is to extend Oliver Bennett's probationary period until 30 April 2025.

This extension allows additional time for performance review focused on meeting clear objectives and utilising agreed support mechanisms.

A follow-up probation review is scheduled for 15 April 2025 to assess progress and determine recommendations regarding continued contract engagement until 1 August 2025.

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5. REASONS

The extension follows observations that although Oliver's work is accurate, there remains a need for improvement in consistently delivering to stakeholders and adhering to deadlines.

Extending the probation period provides an opportunity to address these areas through targeted training, regular check-ins, and mentorship support.

Oliver's acceptance of clearer expectations and measurable objectives supports a constructive approach to his development.

This action aligns with the Probation and Fixed-Term Worker Policy v3.1 and the Appraisal and Performance Improvement Procedure.

The objective is to confirm Oliver's capability to meet the role's requirements and the employer's expectations before confirming contract continuation.

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Probation Review Record

6. FOLLOW-UP ACTIONS

Priya Desai, Finance Lead, will oversee implementation of support measures including arranging training, scheduling weekly check-ins, and facilitating mentorship from a senior analyst.

Clear, measurable objectives will be agreed with Oliver prior to the follow-up review.

The next probation review is to be conducted by 15 April 2025, with interim progress updates expected by 28 February 2025.

It is essential to verify dates, the list of measurable objectives, the appointed mentor's name, and agreed training arrangements before issuing this record.

Should Oliver meet the agreed objectives by the extended probation period's conclusion, a recommendation will be made to continue the contractor engagement to 1 August 2025.

Continued

Probation Review Record

7. AUDIT INFORMATION

Document reference: HRA-8EF9BA1C.

Date of creation and review scheduling: 14 July 2026.

Issued by HRHeaven QA Sample Employer as formal probation review record for Oliver Bennett.

This document will be issued as a PDF by email, requiring signatures from the Finance Lead and Oliver Bennett to confirm acknowledgement.

All decisions and actions comply with relevant organisational policies and procedures.

Employer review of factual details, dates, and documented objectives prior to issue is required to ensure accuracy and compliance.