

Probation Meeting Step-by-Step Guide for Simitive

First Probation Meeting

1. Please log into the reviewee's Simitive account here: <https://paediatricspdr.simitive.com/>
2. In the "My Reviews" area, click on the one that states "probation start"
3. Please log in the goals discussed in the meeting in the "Introduction" tab, using your job description.
4. Complete the three boxes at the top (Meeting date and time: use date for mid probation, Commenters (can skip), Share with reviewee
5. Click on "Share and close" to share the form with the line manager.
6. Now, please log into the line manager's Simitive account.
7. They can find the review form in the "Action" tab. Click on "Go to the review form".
8. They can edit the reviewee's goals if necessary. Please only do this with the reviewee's approval.
9. Confirm the review form by clicking on the blue "Viewed" button at the top.
10. Click: "Share and close" (the grey button), DO NOT FINALISE the form (i.e. do not press the green button). If you click "finalise and share", the form will be archived and cannot be used for the mid-probation meeting).

Mid-Probation Meeting

1. Please log into the reviewee's Simitive account here: <https://paediatricspdr.simitive.com/>
2. In the "My Reviews" area, click on the one that states "probation start"
3. Please click on the "Mid-Probation" tab.
4. Please copy and paste the goals used in the first review. You can now review those goals and the first few months in your new role and add new ones.
5. Click on "Share and close" to share the form with the line manager.
6. Now, please log into the line manager's Simitive account.
7. They can edit (if necessary), add the reviewer's comments at the bottom of the page
8. At the top of the page, please save a PDF of the review form ("save as print-friendly PDF") and send it to hr@paediatrics.ox.ac.uk
9. Finally, "share and finalise" the review (i.e. press the green button).

10. Now, please log into the reviewee's Simitive account again. In the "My Reviews" section, please click on the Action box that says "the reviewer has shared changes with you" (not the Review Title!). You then need to approve the changes made by the line manager.

11. This will now unlock the final probation form you will use on your next meeting.

Final Probation Meeting

1. Please log into the reviewee's Simitive account here: <https://paediatricspdr.simitive.com/>

2. In the "My Reviews" area, click on the one that states "final probation"

3. Please click on the "End of Probation review" tab.

4. The goals logged in the last meeting should be visible here (if not, please copy them in manually from the PDF created in the last meeting). You can now review those goals.

5. Please also complete the "Planning ahead" tab to prepare for Personal Development Reviews (which are also completed using Simitive).

6. Click on "Share and close" to share the form with the line manager.

7. Now, please log into the line manager's Simitive account, there should be an Action highlighted in the tabs. Click on "go to the review form"

8. Confirm you have viewed the entries and at the bottom, add Reviewer's comments and confirm whether they have passed their probation. Click "Share and close"

9. Now, please log into the reviewee's Simitive account again. In the "My Reviews" section, please click on the Action box that says "the reviewer has shared changes with you" (not the Review Title!). You then need to approve the changes made by the line manager. You can now save and then "Finalise" the review form.

10. Finally, log into the reviewer's Simitive account again and select the Action to "Go to the review form". Please "approve" and thereby finalise the form.

11. HR do not get notified of finalised reviews. Therefore, please remember to save the PDF form and send it to hr@paediatrics.ox.ac.uk with the outcome of the final probation review. Thank you ☺