


In situations such as redeployment, a trial period within an alternative post may be agreed.

This summary guide is divided between the **Originating Department** and the **Receiving Department**, and covers the following process steps:

Originating Department	1
A. Start of trial period.....	1
B. Extension of Trial Period	2
C. End of Trial Period.....	2
Receiving Department	3
A. Start of trial period.....	3
B. Extension of Trial Period	5
C. End of Trial Period.....	5
Flow Diagram	7

The guide refers you to the appropriate detailed guides, providing specific data where relevant.



Note: It is expected that the Personnel Administrators from both departments will communicate off-system regarding the move to agree the details before processing the move through CoreHR.

Originating Department

A. Start of trial period

1. Amend Appointment – see **QRG: CH6_ Change in Appointment**.

Specifically:

Field Name	Description
Hours	Change to 0 .
FTE	Change to 0 .
Multiplier	Change to 0 .
Action	Select Trial Period .
Reason Code	Select Trial Period Start (Out) .

2. If required end allowances – see **QRG: CH12_End Allowances**.

3. Contact facilities, IT etc. to amend access for the employee.

B. Extension of Trial Period

No action required.

C. End of Trial Period

At the end of the trial period, either:

- Employee returns to previous post – **Go to C1** →
- Employee is transferred to trial post (where the post is permanent/fixed term – i.e. no longer a trial period) – **Go to C2** →
- Employee leaves – **Go to C3** →

C1. Employee is returning to previous post



Note: Only follow these steps if the employee is returning to their original post and will continue to be employed for a day or more. If the employee will be leaving immediately go straight to **C3** and process them as a leaver.

1. Amend Appointment – see **QRG: CH6_Change in Appointment.**

Specifically:

Field Name	Description
Hours	Change back to previous level.
FTE	Change back to previous level.
Multiplier	Change back to previous level.
Action	Select Trial Period.
Reason Code	Select Trial Period Return.

2. Set up/change allowances

If required re-add allowances – see **QRG: NS0_New Starter (Section E).**

3. **Approve allowances** - Approve new allowances if applicable– see **QRG: NS0_New Starters (Section F)**.
4. Contact facilities, IT etc. to re-activate access for the employee.
5. Issue appointment amendment letter to confirm change.

C2. Employee is transferred to trial period post

As per the transfer process:

1. Approve the transfer request. See **QRG: PA2e_Appoint Transfer (new department)**.

C3. Employee is processed as a Leaver

See **QRG: EA1_End Appointment(s)** for guidance.

The **Leaving Code** and **Destination Code** will depend on the specific circumstances.



Note: It is important for statutory reporting purposes that the correct leaving code and destination are selected and should be based on the reason for leaving their substantive post, e.g. end of FTC. You should NOT select Trial Period End as the leaving code.

Receiving Department

A. Start of trial period

Unless there is already an existing vacancy to be filled on a trial basis:

1. Request a New Appointment
 - 1.1. Complete and submit a staff request – see **QRG: RQ1a_Create Staff Request (New Post)** or **QRG: RQ1b_Create Staff Request (Existing Post)** as appropriate.

Specifically:

Field Name	Description
Planned End Date	Enter the planned end date (trial periods should be fixed term).
Contract Duration	Enter the contract duration.
Additional Information	Enter any additional information as required. E.g. name of employee and that this is a trial period.

1.2. Request Approval - see **QRG: RQ2_Approve or Reject Staff Request.**

1.3. Agree details of start date, handovers etc with the originating department, and contact facilities, IT etc. to arrange new access for the employee.

2. Appoint the individual

The employee should be appointed as an additional appointment. See **QRG: PA2b_Appoint - Additional Appointment.**

Specifically:

Field Name	Description
Target End Date	Enter end date for fixed term post.
Employee Status	Check/select Fixed term.
Action	Select Trial Period.
Reason Code	Select Trial Period Start.

3. Commence employee in CoreHR – see **QRG: NS0_New Starter (Section D).**

Issue appointment amendment letter to confirm change.

4. Set up new allowances

Set up new allowances if applicable – see **QRG: NS0_New Starter (Section E).**

5. Approve allowances

Approve new allowances if applicable – see **QRG: NS0_New Starters (Section F).**

B. Extension of Trial Period

If relevant, the trial period can be extended:

1. Amend Appointment_ – see **QRG: CH6_Change in Appointment.**

Specifically:

Field Name	Description
Target End date	Update as required.
Action	Select Trial Period.
Reason Code	Select Trial Period Extended.

2. Issue appointment amendment letter to confirm change.

C. End of Trial Period

At the end of the trial period, either:

- Employee returns to previous post – **Go to C1** →
- Employee is transferred permanently to trial post (where the post is permanent/fixed term – i.e. no longer a trial period) – **Go to C2** →
- Employee leaves (*This must be processed from the substantive post by the Originating Department*) – **Go to C3** →

C1. Employee is returning to previous post

1. End trial period appointment – see **QRG: EA1_End Appointment(s).**

Specifically:

Field Name	Description
Leaving Code	Select Trial Period Ended.
Leaving Destination Code	Select Not Applicable/ Not Required.
Ending Reason	Free text field, enter any additional information.

Note: Ending the appointment will automatically end any allowances.

C2. Employee is transferred permanently to trial period post

Assuming that the post is a permanent one, as per the transfer process:

1. Raise staff request for new planned appointment/post as relevant.
2. Initiate a transfer request from the originating department. See **QRG: PA2e_Appoint Transfer (new department)**.
3. Appoint the individual.

Specifically:

Field Name	Description
Action	Select New Appointment .
Reason Code	Select Trial Period made Permanent .

4. End the trial period appointment – see **QRG: EA2_End Appointment (one of multiple)**.

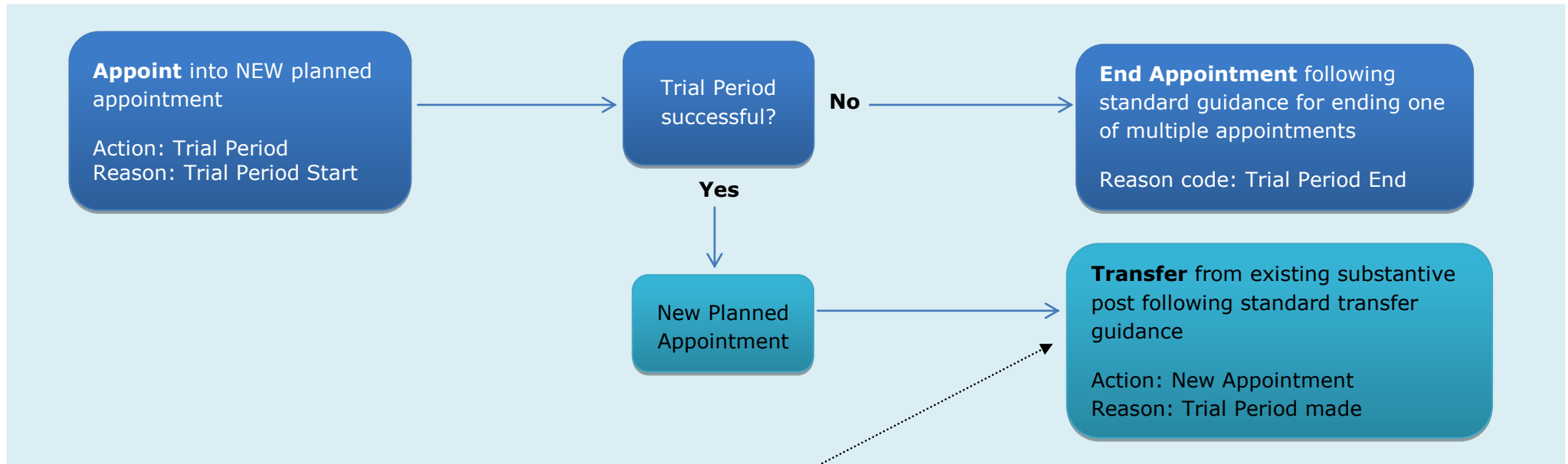
Specifically:

Field Name	Description
Leaving Code	Select Trial Period Ended .
Leaving Destination Code	Select N/A .
Ending Reason	Free text field, enter any additional information.

Note: Ending the appointment will automatically end any allowances.

Flow Diagram

Trial Post



Substantive Post

