

Probation Policy & Procedure

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Introduction

At BrisDoc, we recognise that welcoming and supporting new co-owners effectively is essential to delivering safe, high-quality patient care and maintaining a respectful, inclusive working environment.

Starting a new role can involve learning, adjustment and challenge. Most issues that arise during probation are likely to relate to unfamiliarity with systems, expectations, standards, ways of working or role requirements, rather than any lack of commitment or intent. BrisDoc's approach to probation is therefore supportive, developmental and fair.

Probation provides a structured period in which BrisDoc and the co-owner can assess whether the role is the right fit, whether the required standards are being met, and whether any additional support, training or adjustment is needed. It also enables BrisDoc to ensure that co-owners are able to work safely, reliably and effectively in line with the needs of patients, colleagues, services and the organisation.

This policy sets out a clear and consistent framework for managing probation periods in a fair, transparent and lawful way. Wherever possible, issues should be addressed early through guidance, feedback, coaching, training and appropriate support. Decisions relating to confirmation, extension or unsuccessful completion of probation should be based on evidence gathered throughout the probation period and should not come as a surprise to the co-owner.

This policy should be read alongside BrisDoc's Disciplinary Policy, Sickness and Wellbeing Policy, Capability Policy or guidance where applicable, Equality, Diversity and Inclusion commitments, Reasonable Adjustments guidance and relevant contractual terms.

Probation at a Glance

Standard probation period	Four months
Review points	Day 1, Month 1, Month 2, Month 3 and Month 4
Concerns at Month 2	Support and improvement plan agreed and recorded in Perform
Concerns at Month 3	People Team advice required
Extension	Normally one month; total probation should not normally exceed six months
Unsuccessful probation	Formal meeting, written outcome and right of appeal
Records	Managed through Perform

Scope

This policy applies to employees appointed to roles within BrisDoc Healthcare Services, unless otherwise stated in their contract of employment.

For the purposes of this policy, BrisDoc uses the term co-owner to refer to employees. Where this policy refers to co-owners, it means employees who are subject to BrisDoc's employment policies and contractual arrangements.

Bank workers, self-employed contractors, honorary contract holders and individuals engaged under non-employment arrangements are not subject to the formal probation arrangements in this policy. However, BrisDoc's expectations relating to safe practice, conduct, capability, attendance, professionalism, values and respectful behaviour apply to all individuals working on behalf of BrisDoc.

Where concerns arise in relation to bank workers, self-employed contractors or individuals under other working arrangements, these will be managed in line with the relevant terms of engagement and with advice from the People Team.

Principles of Fair Probation

BrisDoc is committed to managing probation fairly, consistently and with compassion. Decisions during probation will be guided by the following principles:

- **Support first:** probation is intended to support successful induction, learning and integration into the role.
- **Clarity:** role expectations, objectives, standards and behaviours should be explained from the outset.
- **Early feedback:** concerns should be raised promptly, constructively and honestly.
- **No surprises:** decisions to extend probation or end employment should not come as a surprise to the co-owner.
- **Proportionality:** action taken during probation should be reasonable and proportionate to the concerns identified.
- **Evidence-based and documented decision-making:** outcomes should be based on clear evidence, not assumptions or general impressions. Probation reviews, support plans, outcomes and key decisions should be recorded through Perform, or any successor system.
- **Consistency:** similar situations should be managed consistently, while taking account of individual circumstances.
- **Equality and inclusion:** managers must consider BrisDoc's responsibilities under the Equality Act 2010, including reasonable adjustments where health or disability may be relevant.
- **Safe service delivery:** BrisDoc must balance support for the individual with its responsibilities to patients, colleagues, service quality, professional standards and organisational risk.
- **Fair process:** where probation may be extended or employment may be ended, the co-owner will be given the opportunity to respond before a final decision is made.

Roles and Responsibilities

Co-owners

Co-owners are expected to:

- engage actively with induction, training and probation support
- understand the requirements of their role
- ask questions where expectations are unclear
- take on board feedback and guidance
- demonstrate BrisDoc's values, behaviours and standards
- raise any concerns, support needs, health issues, wellbeing concerns or adjustment needs at an early stage
- attend probation review meetings, contribute constructively and engage with agreed actions recorded through Perform
- complete required training, declarations, checks and role-specific requirements within agreed timescales

Line managers

Line managers are responsible for:

- providing a structured induction appropriate to the role
- setting clear expectations from the outset
- explaining key standards, objectives, values and behaviours
- holding probation review meetings at the required stages
- giving timely, honest and constructive feedback
- identifying and addressing concerns early
- recording discussions, agreed actions, support, review outcomes and decisions in Perform, or any successor system
- ensuring the co-owner has reasonable opportunity to improve where concerns arise
- involving the People Team at the required points
- considering health, wellbeing, equality and reasonable adjustment responsibilities throughout probation
- ensuring probation decisions are fair, evidence-based and proportionate

Managers must not wait until the end of probation to raise concerns that could reasonably have been identified earlier.

People Team

The People Team is responsible for:

- providing advice and guidance to managers on probation management
- supporting fair and consistent application of this policy
- advising where probation extension or unsuccessful probation is being considered
- advising on Equality Act considerations, Occupational Health referrals and reasonable adjustments

- supporting managers to identify the most appropriate process where concerns may be better addressed through another policy
- helping ensure decisions are lawful, proportionate, evidence-based and aligned with BrisDoc values
- supporting effective and consistent use of Perform for probation, where required

Probation Period

Standard Probation Period

The standard probation period at BrisDoc is four months.

The probation period begins on the co-owner's first day of employment.

During probation, the co-owner's performance, conduct, attendance, capability, values, training completion, role suitability and ability to meet the requirements of the post will be reviewed on an ongoing basis.

If the required standards are met, probation will normally be confirmed at the four-month probation outcome review.

The four-month period is intended to allow a fair assessment of role suitability while ensuring that any concerns are addressed well before the six-month ordinary unfair dismissal threshold due to apply from January 2027.

Probation Review Meetings

Managers must meet with co-owners at the following stages:

- Day 1: welcome, induction and expectations
- Month 1: early check-in
- Month 2: progress review
- Month 3: developmental review
- Month 4: probation outcome review

These meetings should be proportionate to the role and circumstances, but they must be documented.

Where the co-owner is working irregular shifts, part-time hours, remote or hybrid arrangements, the manager should still ensure that meaningful review conversations take place at the required stages.

Shadowing, Induction and Supervised Practice

Some roles may require a period of shadowing, induction, supervised practice, training or familiarisation before the co-owner begins working independently or undertaking their full duties. This includes roles where shadowing may take place before the co-owner starts their default rota or full working pattern.

This period forms part of the probation period, as probation begins on the co-owner's first day of employment. However, managers should take account of the nature and length of any shadowing, induction or supervised practice when assessing progress during probation.

Where a co-owner has not yet had sufficient opportunity to demonstrate the full requirements of the role, managers should ensure that probation decisions are proportionate and based on the evidence available. It may be appropriate to focus early reviews on engagement, learning, training completion, values, conduct, attendance, feedback from shadowing or supervision, and progress towards independent practice.

Where limited exposure to the full role means that further assessment time is reasonably needed, this may be considered when deciding whether to confirm probation or extend probation in line with this policy.

Recording Probation in Perform

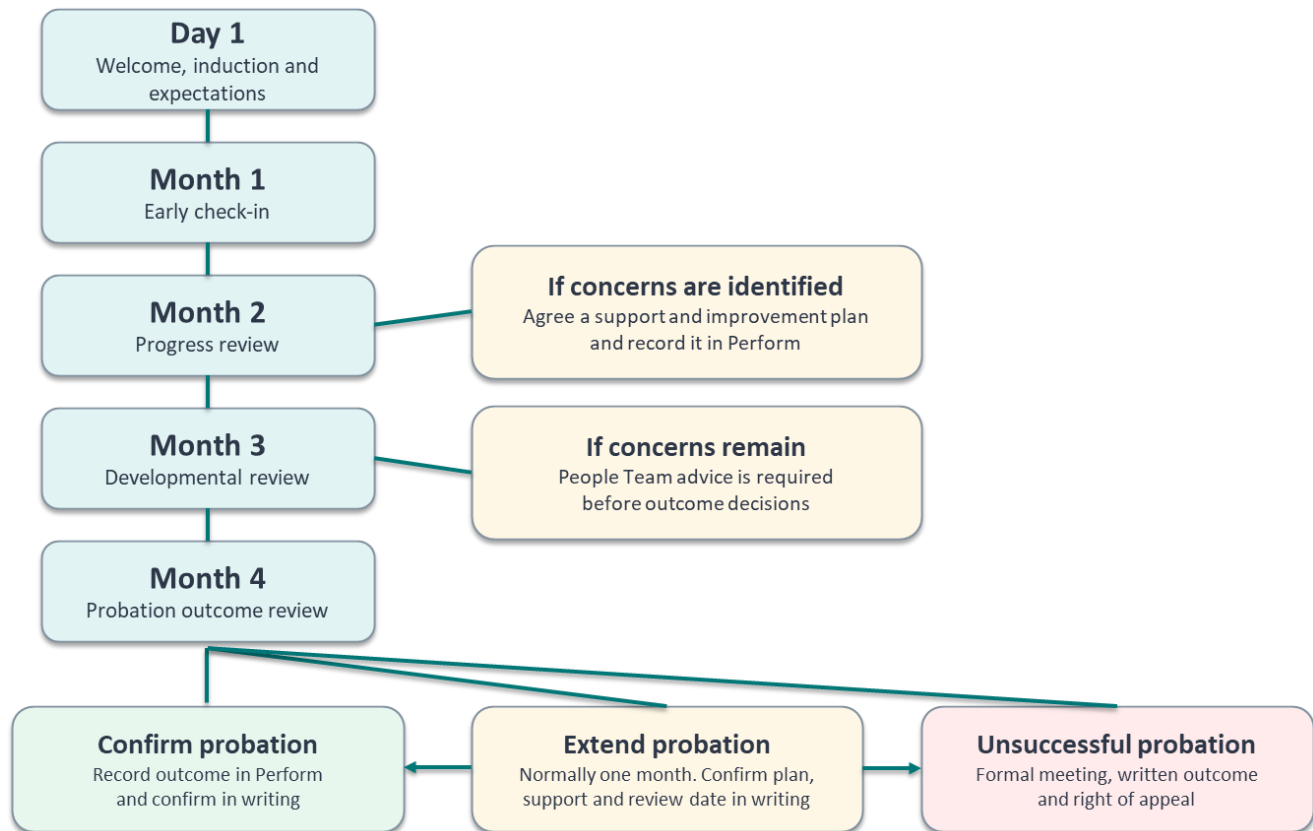
BrisDoc's probation process will normally be managed and recorded through Perform, or any successor system.

Managers are responsible for recording probation reviews, agreed actions, support plans, extensions and outcomes promptly and accurately. Perform supports the probation process but does not replace good-quality management conversations, timely feedback, fair decision-making or People Team advice where required.

Unless stated otherwise, probation documentation should be completed in Perform. Sensitive personal information should only be recorded where necessary and proportionate, with People Team advice sought where needed.

Managers should follow the relevant Perform guidance when completing probation records, including any step-by-step instructions or screenshots provided by the People Team. The guidance will be updated separately from this policy as the system or workflow changes.

Probation Process Flow



Process Overview

Day 1 Welcome, Induction and Expectations

The Day 1 meeting should cover:

- the purpose of probation
- key role requirements
- expected standards of performance, behaviour and attendance
- BrisDoc values and ways of working
- mandatory training and role-specific training requirements
- supervision and support arrangements
- how feedback will be given
- how the co-owner can raise concerns or ask for support
- any known reasonable adjustments, health or wellbeing considerations
- key contacts and sources of help
- how probation reviews and actions will be recorded and accessed in Perform

This meeting does not need to be lengthy, but it should give the co-owner a clear understanding of what is expected and how they will be supported.

Month 1 Early Check-in

The Month 1 review should focus on settling in, early support and initial feedback. The manager should discuss:

- how the co-owner is finding the role
- whether induction and training are on track
- early strengths and positive progress
- any areas requiring further support or clarification
- any concerns raised by the co-owner
- any early concerns identified by the manager
- any wellbeing, health or adjustment needs
- progress during any shadowing, induction, supervised practice or training period

Where minor issues are identified, these should normally be addressed through guidance, coaching, additional training or clarification of expectations.

Month 2 Progress Review

The Month 2 review should provide a clearer assessment of progress against role requirements. The manager should review:

- performance against core duties
- conduct and values
- attendance and reliability
- training completion
- service-specific requirements
- working relationships
- feedback from relevant colleagues, supervisors or trainers
- any support already provided
- any concerns requiring further action
- whether the co-owner has had sufficient opportunity to demonstrate the full requirements of the role

Where concerns are identified at Month 2, the manager should agree a short support and improvement plan with the co-owner. The support and improvement plan does not need to be lengthy, but it must be clear enough for the co-owner to understand:

- the concern or gap in expected standards
- the improvement required
- the support, training or supervision to be provided
- how improvement will be reviewed
- the timescale for review
- the possible consequences if improvement is not achieved

The support plan should be recorded in Perform and shared with the co-owner.

Month 3 Developmental Review

The Month 3 review is a key decision point. The manager should consider whether the co-owner is likely to meet the required standards by the Month 4 outcome review.

If there are no significant concerns, the meeting should focus on consolidation, confidence, ongoing development and preparation for confirmation.

If concerns remain at Month 3, the manager must seek advice from the People Team. This is required where:

- performance standards are not being met
- conduct or behaviour concerns have arisen
- attendance or reliability is affecting the role
- mandatory or role-specific requirements have not been completed
- capability concerns remain despite support
- health, disability or wellbeing factors may be relevant
- extension or unsuccessful probation may need to be considered
- the manager is unsure which process should apply

People Team advice should be sought early enough to allow a fair process before the end of the probation period.

The Month 3 review outcome and agreed next steps should be recorded in Perform. Any confidential People Team advice should be retained in line with BrisDoc's HR record-keeping arrangements.

Month 4 Probation Outcome Review

At the end of the four-month probation period, the manager must hold a probation outcome review. The purpose of the meeting is to:

- review performance, conduct, attendance, capability and role suitability
- review feedback given throughout probation
- review the probation record held in Perform
- consider evidence of progress
- consider whether required training and checks have been completed
- consider any support, adjustments or mitigating circumstances
- explain the proposed outcome
- allow the co-owner to respond
- confirm next steps

The possible outcomes are:

- successful completion of probation
- extension of probation
- unsuccessful completion of probation, which may result in termination of employment
- referral to another appropriate process, such as capability, sickness, disciplinary or another relevant procedure

Where extension or unsuccessful probation is being considered, the manager must consult the People Team before any final decision is made.

The outcome of the Month 4 review must be recorded in Perform and confirmed in writing to the co-owner.

Outcomes of Probation

Evidence and Decision-making

Probation decisions must be based on clear, factual and proportionate evidence. Relevant evidence may include:

- probation review notes, including those recorded in Perform
- induction records
- training records
- supervision notes
- feedback already shared with the co-owner
- examples of work completed
- examples of concerns, errors, omissions or behaviours
- attendance records, where relevant
- records of support, training or coaching provided
- reasonable adjustments considered or implemented
- Occupational Health advice, where applicable
- impact on patients, colleagues, service delivery, safety or professional standards
- the co-owner's explanation, response or mitigation

Managers should avoid relying on vague statements such as “not the right fit” or “not settling in” unless these are supported by specific examples linked to role requirements, behaviours or service needs.

Successful Completion of Probation

Where the co-owner has met the required standards, the manager will confirm successful completion of probation.

The manager should:

- confirm the outcome in writing
- record the outcome in Perform
- thank the co-owner for their contribution
- confirm any ongoing objectives, development or support
- ensure relevant systems and records are updated

Successful completion of probation does not prevent BrisDoc from managing future concerns under the relevant policy where necessary.

Extension of Probation

Probation may be extended where:

- required standards have not yet been consistently met
- improvement is evident but more time is reasonably needed
- absence has limited the opportunity to assess performance
- reasonable adjustments are being considered or trialled
- additional training, supervision or assessment is required
- there is a clear and realistic prospect that the co-owner can meet the required standard within the extension period

Probation extensions should normally be for one month.

A further extension, up to a maximum total probation period of six months, may be agreed only where there is a clear reason and following advice from the People Team.

Probation should not normally exceed six months. Any proposal to extend beyond six months requires approval from the Director of People, or nominated senior People Team representative, and must be supported by clear reasons.

Any extension must be confirmed in writing and must include:

- the reason for the extension
- the length of the extension
- the standards or improvements required
- the support, training, supervision or adjustments to be provided
- how progress will be reviewed
- the date of the further review meeting
- confirmation that failure to meet the required standard may result in unsuccessful probation and termination of employment
- how the extension and review plan will be monitored

The extension plan and review dates should be recorded in Perform.

Extensions must not be used simply because reviews have not taken place or because concerns were not raised early enough.

Unsuccessful Probation

Where the required standards have not been met by the end of probation or any agreed extension, probation may be deemed unsuccessful. This decision may result in termination of employment in line with the co-owner's contract and employment law.

Before any decision is made, the manager must:

- seek advice from the People Team
- ensure concerns have been discussed with the co-owner
- ensure relevant support has been considered
- consider whether reasonable adjustments are required

- consider whether another process is more appropriate
- invite the co-owner to a formal probation outcome meeting
- give the co-owner a reasonable opportunity to respond
- consider any mitigation or explanation
- consider whether extension, redeployment or another reasonable alternative is appropriate
- review the probation record held in Perform

A decision to terminate employment following unsuccessful probation must be confirmed in writing. The letter should include:

- the reason for the decision
- the evidence relied on
- a summary of support provided
- the co-owner's response or mitigation
- the notice arrangements or payment in lieu of notice, where applicable
- the final date of employment
- the right of appeal
- any practical arrangements relating to final pay, equipment, access and handover

Dismissal during or at the end of probation should not be treated as an informal decision. It is a dismissal and must be handled fairly.

Right to be Accompanied

Where a formal probation meeting may result in extension of probation, unsuccessful probation, termination of employment or another significant outcome, the co-owner will be offered the right to be accompanied.

The companion may be:

- a work colleague
- a recognised trade union representative

The companion may support the co-owner, take notes, confer with them and address the meeting, but may not answer questions on their behalf.

This right does not normally apply to routine probation check-ins or informal review conversations. However, managers may allow support at other meetings where this would be reasonable, compassionate or appropriate in the circumstances.

Appeal

A co-owner has the right to appeal against a decision to terminate employment following unsuccessful probation. The appeal should be submitted in writing within five working days of the written outcome letter.

Where employment has been terminated following unsuccessful probation, the dismissal will normally take effect as confirmed in the outcome letter. If an appeal is successful, BrisDoc will

confirm the appropriate remedy, which may include reinstatement, re-engagement or another appropriate outcome.

The appeal should set out the grounds of appeal, which may include:

- the co-owner believes the decision was unreasonable
- relevant evidence was not considered
- the process was not followed
- the co-owner believes support or adjustments were inadequate
- new information has become available
- the co-owner believes the outcome was disproportionate

Where practicable, the appeal will be heard by a manager who has not previously been involved in the decision and who is sufficiently senior to review the matter.

The appeal outcome may:

- uphold the original decision
- overturn the decision
- substitute an alternative outcome
- recommend further review, support, redeployment or another appropriate process

The appeal decision will be confirmed in writing. The appeal decision is final.

Equality, Health and Reasonable Adjustments

BrisDoc is committed to equality, inclusion and the fair treatment of all co-owners.

Where a co-owner discloses a health condition, disability, neurodivergence, pregnancy-related issue, wellbeing concern or other factor that may affect probation, managers must respond sensitively and without assumption.

Where a health condition or disability is known or suspected to be affecting performance, attendance, training, communication, behaviour or ability to meet role requirements, the manager must seek advice from the People Team.

It may be appropriate to:

- discuss support needs with the co-owner
- refer the co-owner to Occupational Health
- consider reasonable adjustments
- adjust training, supervision or communication methods
- adapt review arrangements
- extend or pause decision-making where adjustments are being considered or trialled
- review whether objectives or timescales remain reasonable
- consider whether another policy or process is more appropriate

Pregnancy-related absence, maternity-related factors and disability-related matters must be handled carefully and in line with legal protections.

Probation must not be used to avoid BrisDoc's equality responsibilities.

Information about health, disability, neurodivergence, pregnancy or other sensitive personal matters should only be recorded where necessary and proportionate. Managers should seek People Team advice if unsure what should be recorded in Perform or retained separately on the HR file.

Attendance During Probation

Attendance and reliability may be considered during probation where they are relevant to the role and service requirements. Where absence occurs during probation, the manager should consider:

- the amount and timing of absence
- the reason for absence, where known
- whether the absence is disability-related, pregnancy-related or otherwise protected
- whether sufficient time has been available to assess performance
- whether support or adjustments are needed
- whether probation should be extended to allow a fair assessment
- whether the Sickness and Wellbeing Policy should apply

Managers must seek People Team advice before making any significant probation decision linked to sickness absence, health, disability or pregnancy-related absence.

Any attendance concerns discussed as part of probation should be recorded factually and sensitively, with advice from the People Team where health, disability or pregnancy-related factors may be relevant.

Conduct, Capability and Other Processes

Which Process Should Be Used?

Situation	Usual route
New starter needs more time, training, supervision or feedback to reach the required standard	Probation process
Minor conduct, behaviour or values concern during probation	Probation feedback and support, unless serious
Serious conduct concern or potential gross misconduct	Disciplinary Policy
Health, disability, neurodivergence, pregnancy or wellbeing-related concern	Probation process with People Team advice; consider Sickness and Wellbeing Policy and reasonable adjustments

Attendance concern during probation	Probation process with People Team advice where health, disability or pregnancy may be relevant
Existing co-owner struggling in a new role	Role confirmation period, support, possible return to previous role, redeployment or relevant formal process
Concern continues after probation is confirmed	Relevant formal policy, such as capability, disciplinary or sickness and wellbeing

Conduct Concerns During Probation

Conduct concerns during probation should be addressed promptly. Minor concerns may be addressed through feedback, clarification of expectations, coaching or informal guidance.

More serious conduct concerns may be managed under the Disciplinary Policy, even where the co-owner is still in probation. Examples may include:

- serious breach of policy
- safeguarding concern
- dishonesty
- serious professional misconduct
- bullying, harassment or discrimination
- breach of confidentiality
- serious patient safety concern
- refusal to follow reasonable instructions
- behaviour that undermines trust and confidence

Where there is potential gross misconduct, BrisDoc may move directly to the Disciplinary Policy rather than continuing under the probation process.

Capability and Performance Concerns During Probation

Capability and performance concerns should normally be managed within the probation process where they relate to the co-owner learning or adjusting to the role. Managers should provide reasonable support, which may include:

- clearer objectives
- additional supervision
- coaching
- training
- shadowing
- feedback
- adjustment of workload during induction
- more frequent review meetings
- written support plans
- reasonable adjustments, where applicable

Where capability concerns are complex, health-related, linked to disability, or continue beyond probation, the manager should seek People Team advice on whether the Capability Policy or guidance, or another process is more appropriate.

Existing Co-owners Moving Role or Taking a Second Post

Existing Co-owners Moving Into a New Role

Where an existing co-owner moves into a new role, promotion, secondment or substantive internal transfer, they retain continuity of employment and existing statutory employment rights.

In these circumstances, BrisDoc will normally apply a role confirmation period or trial period to the new role. This is not the same as new-starter probation and does not mean that the co-owner's overall employment with BrisDoc is provisional.

The purpose of a role confirmation period is to assess whether the co-owner can meet the requirements of the new role and to provide structured support during the transition.

The arrangements should be confirmed in writing before the move begins and should include:

- the length of the role confirmation period
- the standards and objectives to be met
- support and training arrangements
- review points
- what may happen if the role is not confirmed
- whether the co-owner has a right to return to their previous role if the role confirmation period is unsuccessful
- whether redeployment may be considered

If the co-owner does not meet the requirements of the new role, BrisDoc will consider reasonable options before dismissal, including:

- extending the role confirmation period
- providing further support or training
- returning the co-owner to their previous role, where this is available and practicable
- redeployment to another suitable role
- adjusting duties, where appropriate
- managing the matter under the relevant formal policy

Dismissal will only be considered where there is a fair reason, a fair process has been followed, and no reasonable alternative is available.

Where a role confirmation period applies, review points and outcomes should be recorded in Perform.

Existing Co-owners Taking on a Second Post

Where an existing co-owner takes on an additional or second post while remaining employed in their substantive role, BrisDoc may apply a trial period to the additional post.

If the co-owner does not meet the required standards for the additional post, BrisDoc may end the additional post arrangement.

Ending the additional post would not normally affect the co-owner's substantive employment, unless the concerns also raise wider issues relating to conduct, capability, attendance, professional standards, safeguarding, patient safety, trust and confidence, or suitability for their substantive role.

Any such wider concerns should be managed under the relevant BrisDoc policy and with advice from the People Team.

Any trial period for an additional post should be documented clearly, including whether the review relates only to the additional post or has wider implications.

Confidentiality, Record Keeping and Notice

Confidentiality and Record Keeping

Probation records will normally be held in BrisDoc's Perform or any successor system. Records may also be held on the co-owner's HR file where required.

Information discussed during probation will be treated confidentially and shared only with those who have a legitimate need to know.

Managers must keep accurate, factual and proportionate records of:

- probation meetings
- feedback given
- concerns raised
- support provided
- adjustments considered or implemented
- agreed actions
- evidence reviewed
- decisions made
- outcomes confirmed

Records will be held in line with BrisDoc's data protection requirements and data retention arrangements.

Managers should ensure that records are factual, proportionate and relevant. Sensitive personal information, including health information, disability-related information, pregnancy-related information or personal circumstances, should only be recorded where necessary and appropriate. Where detailed confidential information is required, managers should seek advice from the People Team on where and how it should be stored.

Failure to Hold Probation Reviews

Managers are responsible for ensuring probation reviews take place on time.

Where a probation review is missed, this should be corrected as soon as possible. A missed review does not automatically mean probation is confirmed.

Where required reviews have been missed and extension or unsuccessful probation is being considered, the manager must seek People Team advice before taking further action.

However, BrisDoc should not rely on missed reviews or poor management of the process to justify an extension or dismissal. Where the organisation has not provided proper feedback, support or review, this must be taken into account before any decision is made.

Failure to complete the required steps in Perform does not remove the need to manage probation fairly and promptly.

Notice During Probation

Notice arrangements during probation will be as set out in the co-owner's contract of employment.

Where employment is terminated following unsuccessful probation, BrisDoc will confirm whether notice will be worked or paid in lieu, in line with contractual terms and legal requirements.

Summary dismissal without notice may only apply in cases of gross misconduct and must be managed under the appropriate process.

Policy Review

This policy will be reviewed regularly and updated in line with legislative changes, Acas guidance, employment law, organisational learning and BrisDoc practice.

The policy will be reviewed before January 2027 to ensure it remains aligned with the implementation of the Employment Rights Act 2025 changes.

Appendices

Appendix 1: Manager Probation Checklist

System setup

- ensure the co-owner is set up correctly in Perform
- check that the probation workflow is visible and review dates are scheduled
- record each probation review in the system
- ensure any support plans, outcomes and agreed actions are updated promptly
- avoid recording unnecessary sensitive personal information in the system
- seek People Team advice where confidential HR or medical information needs to be stored separately

Before the co-owner starts

- confirm role description and expectations
- prepare induction plan
- identify required training
- identify supervision arrangements
- check whether any adjustments are known or required
- schedule probation review dates

Day 1

- welcome co-owner
- explain probation process
- confirm role expectations
- discuss values and behaviours
- confirm training and induction requirements
- discuss support needs
- document key points

Month 1

- review settling in
- discuss early progress
- identify any support needs
- give early feedback
- document meeting

Month 2

- review progress against role requirements
- discuss strengths and concerns
- agree and record a support and improvement plan if concerns are identified
- document evidence and actions

Month 3

- review whether standards are likely to be met
- seek People Team advice if concerns remain
- consider equality, health or adjustment issues
- document meeting

Month 4

- hold outcome review
- consider evidence
- allow co-owner to respond
- seek People Team advice if extension or unsuccessful probation is being considered
- record the outcome in Perform
- confirm outcome in writing

If probation is extended

- confirm extension in writing
- record extension plan and review date in Perform
- ensure support and improvement actions are clear
- hold review before the extension ends
- seek People Team advice if concerns remain

If probation is unsuccessful

- seek People Team advice before any final decision
- invite the co-owner to a formal outcome meeting
- offer the right to be accompanied
- review the probation evidence
- allow the co-owner to respond
- confirm the decision in writing
- explain appeal rights

Appendix 2: Equality Impact Assessment

This Equality Impact Assessment considers how BrisDoc's Probation Policy may affect co-owners with protected characteristics and how the policy supports fair, inclusive and proportionate decision-making.

The probation period can be a time of adjustment and vulnerability, particularly for new starters, people entering a new sector or service, people returning to work, people with disabilities or health conditions, and people moving into unfamiliar roles. The policy therefore emphasises early support, clear expectations, regular feedback, documented decision-making, reasonable adjustments and People Team involvement where significant concerns arise.

Protected Characteristic	Potential Impact Identified?	Actions Taken / Considerations
Age	Potential variation in confidence, workplace experience, digital confidence or familiarity with BrisDoc systems.	Structured induction, regular check-ins and clear feedback reduce reliance on assumptions about age, confidence or prior experience.
Disability	Disability, neurodivergence or long-term health conditions may affect training, attendance, communication, working patterns or performance.	Managers must seek People Team advice, consider Occupational Health referral, consider reasonable adjustments and avoid making assumptions. Probation may be extended or paused where adjustments are being considered or trialled.
Sex	Assumptions about caring responsibilities, availability, confidence or working patterns may affect probation experience.	The policy requires evidence-based decision-making, consistency and documented feedback.
Gender reassignment	Probation discussions may involve sensitive personal information, privacy or support needs.	The policy requires confidentiality, respect and individualised support.
Pregnancy and maternity	Pregnancy-related absence, appointments, health needs or maternity-related factors could be unfairly treated as attendance or performance concerns.	The policy requires People Team advice where pregnancy or maternity-related factors may be relevant. Decisions must be fair, lawful and not based on protected absence or assumptions.

Race and ethnicity	Cultural misunderstanding, communication differences, bias or lack of familiarity with UK healthcare or organisational systems could affect probation experience.	Clear expectations, regular feedback, documented evidence and People Team oversight reduce the risk of subjective decision-making.
Religion or belief	Working patterns, meetings, uniform, observance or training times may require consideration.	Managers should consider reasonable flexibility where appropriate and seek advice if uncertain.
Sexual orientation	No specific differential impact identified, but confidentiality, respect and inclusive behaviour remain important.	The policy applies equally and aligns with BrisDoc values and conduct expectations.
Marriage and civil partnership	No specific differential impact identified.	The policy applies consistently regardless of marital or civil partnership status.

Intersectionality

Co-owners may experience overlapping barriers linked to more than one protected characteristic or personal circumstance. Managers should avoid one-size-fits-all approaches and consider individual circumstances throughout probation.

The People Team will review any patterns or concerns arising from probation outcomes to support fairness, consistency and continuous improvement.

Appendix 3: Version Control

Date	Version	Author	Change Details
June 2026	1.0	Sarah Aubertin	New policy has been developed to provide a supportive and structured probation framework. Revised to reflect Employment Rights Act 2025 changes due from January 2027, including the six-month ordinary unfair dismissal threshold. Includes structured review points, early escalation, People Team involvement, Perform recording, appeal rights, reasonable adjustment considerations, internal role confirmation periods and second post arrangements.