

Probation Policy FAQs

FAQ	Response
What has changed in the Probation Policy?	The key changes effective from 1 July 2026 are: • Probation period reduced from 6 months to 4 months • Maximum extension reduced from 3 months to 1 month • Formal probation outcome meetings are no longer required; managers will complete a desktop review instead • Employees (excluding teachers and development fire staff) must complete mandatory learning during probation • Introduction of Payment in Lieu of Notice (PILON) provisions • Appeals against probation decisions must be submitted within 5 calendar days rather than 10 days
Which employees does the new policy apply to?	The revised policy applies to employees who commence employment on or after 1 July 2026. Employees who started before this date remain subject to the previous probation arrangements.
Does the probation policy apply to relief staff?	Relief workers are not employees and are engaged on an "as and when required" basis, with no obligation for work to be offered or accepted. As such, they are not subject to employee probation arrangements while working purely as relief workers. Please see policy here for more information Agency, relief and off-payroll workers policy – Relief workers - Lincolnshire County Council
How often should probation review meetings be held?	Managers should: • Hold weekly check-ins during the first month • Hold monthly probation review meetings during months 2–4 • Address concerns as they arise rather than waiting for scheduled review meetings
What should be discussed during probation reviews?	Managers should review: • Performance and capability • Conduct and behaviour • Attendance and timekeeping • Sickness absence • Progress against objectives • Completion of mandatory learning • Any reasonable adjustments required • Any support or training needs identified by the employee.
Can probation be extended?	Yes. Probation can be extended for up to one month where further assessment is required. Managers must clearly explain: • Why the extension is needed • What improvements are required • What support will be provided • What outcomes are expected by the end of the extension period
How frequently should meetings be held during an extension?	Although not mandated by policy, the recommended approach is to hold weekly review meetings throughout the extension period to ensure employees receive regular feedback and support.

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What is a desktop review?	A desktop review is an independent review conducted by the manager without the employee present. The manager reviews probation records, feedback, performance, conduct, attendance and training completion before deciding on one of three outcomes: • Confirmation of appointment • Extension of probation (up to one month) • Invitation to a probation hearing with the possibility of dismissal
When should the desktop review take place?	The policy does not specify an exact date, but it should take place towards the end of the fourth month and allow sufficient time to communicate the outcome before the probation period ends.
Is a meeting still required at the end of probation?	While a formal probation outcome meeting is no longer required, managers should still have a conversation with the employee to explain the outcome of the review, particularly if probation is being extended or concerns remain.
When can probation be terminated early?	An employee may be invited to a probation hearing before the end of probation where: • False or misleading information was provided during recruitment • Performance, attendance or conduct remains unsatisfactory despite support • Serious conduct concerns arise
What notice must be given for a probation hearing?	Employees must receive 5 calendar days' notice of a probation hearing.
Where can managers find the supporting documents?	Templates and supporting materials for Corporate can be found on SharePoint: Employment Policies - Letters, Forms and Templates
Where can Schools access the probation toolkit?	The Probation Toolkit for Schools can be found here Schools_Probation_Toolkit.docx
Who conducts a probation hearing?	Probation hearings are normally conducted by the employee's senior manager (formerly referred to as the "grandparent manager") For school-based employees, the hearing would usually be conducted by the Headteacher.
Can employees be accompanied at a probation hearing?	Yes. Employees may be accompanied by: • A work colleague • A trade union representative • A trade union official An HR representative will also attend the hearing.
What is PILON?	PILON (Payment in Lieu of Notice) allows the Council to terminate employment immediately whilst paying the employee for their contractual notice period instead of requiring them to work it. Managers should always seek HR advice.
What should managers be aware of regarding PILON and timing?	Managers should engage HR early because: • There are strict timelines around probation hearings • Statutory notice provisions must still be considered • Payroll deadlines may need to be taken into account

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What evidence should managers keep during probation?	Managers should retain: • Probation review forms • Notes of one-to-ones • Copies of feedback provided • Evidence of performance concerns • Training records • Records of support provided • Records of any reasonable adjustments implemented
Why is documentation so important?	Poor documentation can make it difficult to justify probation decisions and defend employment tribunal claims.
What happens if managers do not effectively manage probation?	Issues that could have been addressed through probation may later need to be managed through: • Capability procedures • Formal performance management • Employment tribunal proceedings • Settlement agreements The importance of a robust probation management is to reduce risk to the organisation.
How should managers deal with employees who require reasonable adjustments?	Managers must: • Consider reasonable adjustments from the onset. • Review adjustments regularly. • Seek Occupational Health advice where appropriate. • Ensure disability-related concerns are managed fairly and appropriately throughout probation.
What about term-time only employees and school staff?	Managers should plan probation reviews carefully around school closure periods and holidays. If time-sensitive actions such as hearings are likely to fall during school holidays, managers should seek advice from HR as early as possible.
Does the policy apply to fixed-term employees?	Yes. Employees appointed on fixed-term contracts for 4 months and more are still subject to the probation policy.
Does the probation policy apply to internal transfers?	No. Employees moving to another role within LCC do not undergo a new probation period if they have already successfully completed one. Other policies, such as capability or sickness absence procedures, would apply if concerns arise.
Does the probation outcome still need to be recorded on Business World?	Yes. Managers must continue to record probation outcomes on Business World (BW).