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**

- A. Start of trial period
- B. Extension of Trial Period
- C. End of Trial Period

**Receiving Department**

- A. Start of trial period
- B. Extension of Trial Period
- C. End of Trial Period

**Flow Diagram**

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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours</td>
<td>Change to 0.</td>
</tr>
<tr>
<td>FTE</td>
<td>Change to 0.</td>
</tr>
<tr>
<td>Multiplier</td>
<td>Change to 0.</td>
</tr>
<tr>
<td>Action</td>
<td>Select <strong>Trial Period</strong>.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Select <strong>Trial Period Start (Out)</strong>.</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours</td>
<td>Change back to previous level.</td>
</tr>
<tr>
<td>FTE</td>
<td>Change back to previous level.</td>
</tr>
<tr>
<td>Multiplier</td>
<td>Change back to previous level.</td>
</tr>
<tr>
<td>Action</td>
<td>Select Trial Period.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Select Trial Period Return.</td>
</tr>
</tbody>
</table>

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:

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

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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target End Date</td>
<td>Enter end date for fixed term post.</td>
</tr>
<tr>
<td>Employee Status</td>
<td>Check/select Fixed term.</td>
</tr>
<tr>
<td>Action</td>
<td>Select Trial Period.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Select Trial Period Start.</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target End date</td>
<td>Update as required.</td>
</tr>
<tr>
<td>Action</td>
<td>Select Trial Period.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Select Trial Period Extended.</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leaving Code</td>
<td>Select Trial Period Ended.</td>
</tr>
<tr>
<td>Leaving Destination Code</td>
<td>Select Not Applicable/ Not Required.</td>
</tr>
<tr>
<td>Ending Reason</td>
<td>Free text field, enter any additional information.</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Select New Appointment.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Select Trial Period made Permanent.</td>
</tr>
</tbody>
</table>

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

Specifically:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leaving Code</td>
<td>Select Trial Period Ended.</td>
</tr>
<tr>
<td>Leaving Destination Code</td>
<td>Select N/A.</td>
</tr>
<tr>
<td>Ending Reason</td>
<td>Free text field, enter any additional information.</td>
</tr>
</tbody>
</table>

Note: Ending the appointment will automatically end any allowances.
Flow Diagram

Trial Post

**Appoint** into NEW planned appointment
Action: Trial Period Start
Reason: Trial Period start (out)

Trial Period successful?
Yes

**End Appointment** following standard guidance for ending one of multiple appointments
Reason code: Trial Period End

No

**New Planned Appointment**

**Transfer** from existing substantive post following standard transfer guidance
Action: New Appointment
Reason: Trial Period made

Substantive Post

Yes

**Amend Appointment**
Action: Trial Period Start
Reason: Trial Period made

No

**Amend appointment**
Action: Trial Period Return
Reason: Trial Period made

**Make a leaver** following standard guidance for ending an appointment(s)