

IP3 - Managing IPO for academics

There is various tracking and recording activity to be carried out around the academic appraisal (Initial Period of Office, or "IPO") for academic appointments. This guide covers updating review details/dates.

See **QRG: IP2_Managing Probation** for non-academic appointments.

This guide covers the following process steps:

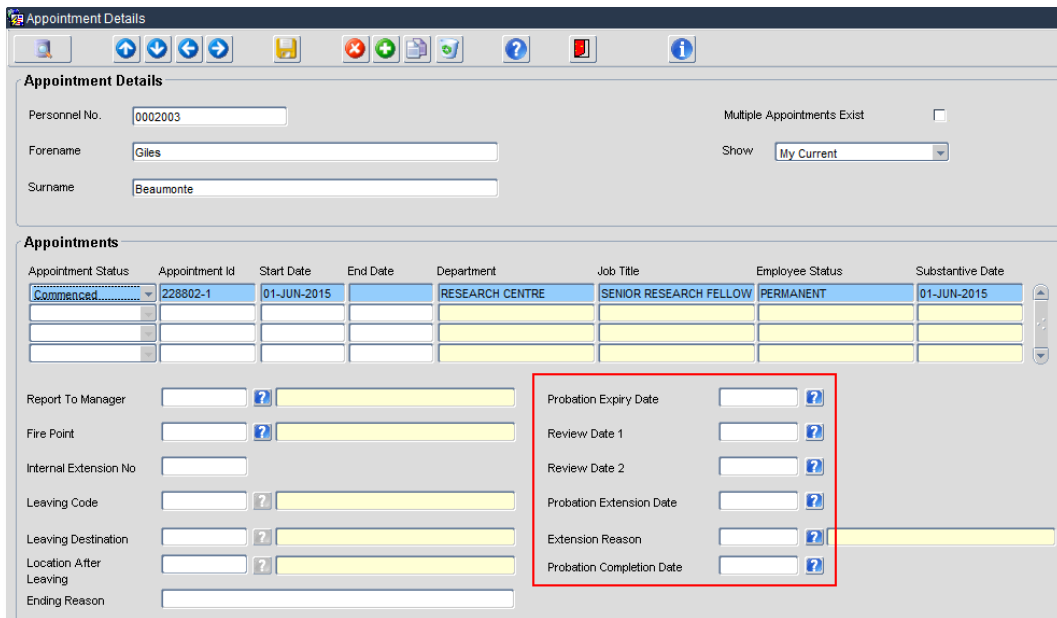
- Basic date information** 1
- Additional IPO data**..... 2
 - Part 1 3
 - Part 2 4
 - Part 3 5
 - Part 4 6

Navigate to: Personnel > Maintenance > Personal Profile

Basic date information

The basic date information should be captured as per probation dates:


1. Search for the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens:




2. If necessary, click into the **Appointment Id** to ensure the correct appointment is highlighted.

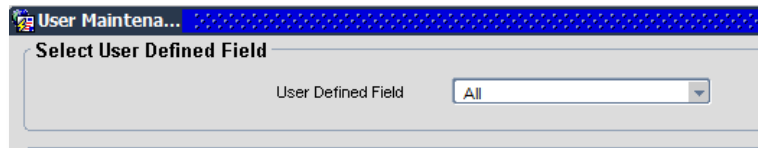
IP3 - Managing IPO for academics


Field Name (* mandatory)	Description
Probation Expiry Date	Update if required.
Review Date 1/2	Enter planned start dates for Interim (1) and Formal (2) reviews.
Probation Extension Date	Enter revised end date if probation is extended.
Extension Reason	Select relevant reason and add comments as appropriate.
Probation Completion Date	Enter date probation completed.

- When changes to details occur, update as required.
- Click . Exit all windows back to the Personnel main screen.

Additional IPO data

- Click the  button. The *Post Appointment Maintenance* window
- Go to **Selection** box > **User Data**. The *User Maintenance* window opens.



- Click to display **User Defined Field** List of Values.
- Select **Appt:Initial Period of Office Part 1, 2, 3 or 4** as appropriate.
- Click .

IP3 - Managing IPO for academics

Part 1

1. Complete details as required:

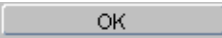
Field Name (* mandatory)	Description
Date From*	Enter the start date of the appointment.
Date To	Leave blank
IPO (years)	Enter length of initial period of office.
Mentor/Advisor Name	Enter name (free text)
Reason Acceleration	If relevant, enter details of reason for accelerated IPO.
Acceleration Approved	If relevant, enter date acceleration approved.
Int Rev Ltr Lecturer	Enter date individual notified of interim review.
Int Rev Ltr College	Enter date college notified of interim review.
Int Rev Ltr HOD	Enter date Head of Department notified of interim review.
Int Review Complete	Enter date interim review completed.
Int Review Approved	Enter date interim review approved.
Follow up Action	Note any specific actions that are required before the final review.

2. Click  .

Part 2

1. Complete details as required:

Field Name (* mandatory)	Description
Date From*	Enter the start date of the appointment.
Date To	Leave blank
Formal Rev Ltr Lecturer	Enter date individual notified of formal review.
Formal Rev Ltr Coll	Enter date college notified of formal review.
Formal Report Due	Enter date report due from individual.
Formal Rept Received	Enter date report received.
Reappointment Letter	If relevant, enter date reappointment letter sent.
Other Outcome	Enter details if outcome other than reappointment.
2nd Rev Ltr Lect	If relevant, enter date individual notified of further review.
2nd Rev Ltr Coll	If relevant, enter date college notified of further review.
2nd Report Due	Enter date report due from individual.
2nd Report Received	Enter date report received.
Notes	Enter notes as required.
Notes 2	Enter notes as required.

2. Click .



Note: Parts 3 and 4 are for holding additional information if required.

Part 3

1. Complete details as required:

Field Name (* mandatory)	Description
Date From*	Enter the start date of the appointment.
Date To	Leave blank
HoD report	Date report requested.
Chair report	Date report requested.
TA report	Date report requested.
Ext. A report 1	Date report requested.
Ext. A report 2	Date report requested.
Ext. A report 3	Date report requested.
Senior Tutor report	Date report requested.
College rep	Date report requested.
Div. Board rep	Date report requested.
Internal dept. rev	Date report requested.
Divisional rep	Date report requested.
Comments	Notes as required.

2. Click .

Part 4

1. Complete details as required:

Field Name (* mandatory)	Description
Date From*	Enter the start date of the appointment.
Date To	Leave blank
HoD report	Date report received.
Chair report	Date report received.
TA report	Date report received.
Ext. A report 1	Date report received.
Ext. A report 2	Date report received.
Ext. A report 3	Date report received.
Senior Tutor report	Date report received.
College rep	Date report received.
Div. Board rep	Date report received.
Internal dept. rev	Date report received.
Divisional rep	Date report received.
Comments	Notes as required.

2. Click . Click . Exit all windows back to the Personnel main screen.

Useful Report: To help track academic appraisal data you should regularly run: [PERDEP08 Academic Appraisals \(IPO\)](#)

Additionally, by following the guidance in **QRG: IP4_Running Reports** the data can be exported to excel for use in generation of mail merge letters to support the academic appraisal process.