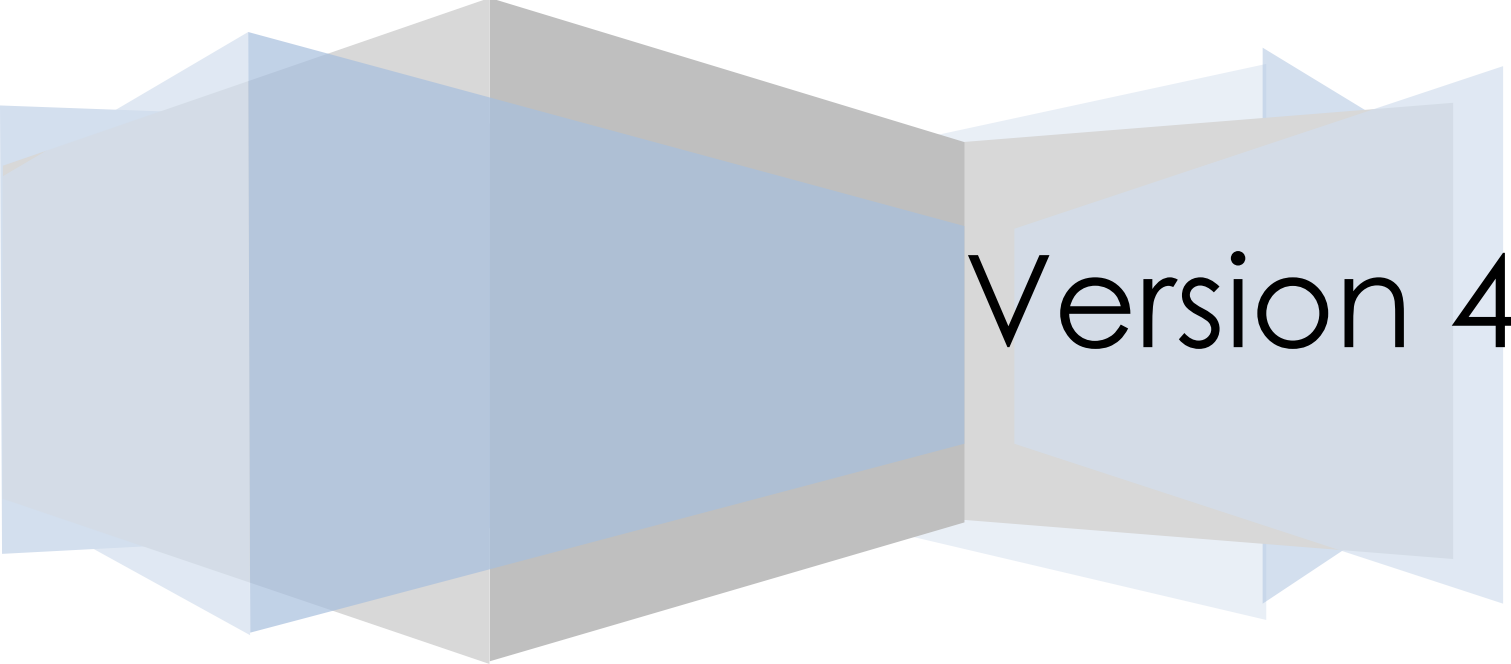


# User Manual

## Probation Module

### Salary level 1 – 12, SMS, DDG

Department: Department of the Premier  
Chief Directorate: People Management Practices  
Directorate: Performance and Priority unit



Version 4

## Document Summary

|                             |                         |
|-----------------------------|-------------------------|
| <b>Title</b>                | User Manual             |
| <b>Project Name</b>         | Probation Module        |
| <b>Project manager</b>      | Chris Mnana             |
| <b>Author</b>               | Sandra Fortuin          |
| <b>Date Created</b>         | April 2020              |
| <b>Electronic file name</b> | PERMIS Probation Module |
| <b>Document Location</b>    |                         |

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<https://permis.westerncape.gov.za/permisp/permis.login>

## 1. Document purpose

The purpose of this User Manual is to provide essential information to the Users to make full use of the PERMIS V4 Probation Module.

It includes a description of the system functions and capabilities, contingencies and step-by-step procedures for system access and use.

## 2. Notes

### ☐ For People Manager/Supervisor:

- Will start off the process by completing Sections A, B and C in respect of each Quarterly Report
- These Sections may be completed randomly, i.e Section C may be completed before A or B
- Section E (Comments) must be completed by Employee/Probationer(First) then People Manager/Supervisor
  - Compulsory fields for completion are in **Red**
  - Email notifications will guide the People Manager/Supervisor and Employee/Probationer and PPU ADMIN accordingly
  - On the Fourth Quarterly, Fifth Probation and Sixth Probation Reports, under Section E, the People Manager/Supervisor need to Select either **No** or **Yes** to the Question “Is Probationary Period to be extended.....”
    - **No** meaning it will Not be extended and process will move to the VRP21 process
    - **Yes** meaning it Will be extended and the process will move to either the Fifth or Sixth Report Process
    - The Reports will be signed-off by both the People Manager/Supervisor and Employee/Probationer Irrespective of whether the Probation Period is extended or not after the Fourth Quarterly Report - **No** (Not Extended) or **Yes** (Probation Extended) as guided by the emails
    - None of these Reports will be Disputed
- Employee/Probationer will sign-off the Probation Report First after updating Comments on Section E then the People Manager/Supervisor - email Notifications will guide the process

### ☐ For Employee/Probationer

- Section D must be completed by the Employee/Probationer
- Section E (Comments) must be completed by Employee/Probationer(First) then People Manager/Supervisor
  - Compulsory fields for completion are in **Red**
  - Email notifications will guide the People Manager/Supervisor and Employee/Probationer and PPU ADMIN accordingly
- Employee/Probationer will sign-off the Probation Report First after updating Comments on Section E then People Manager/Supervisor - email Notifications will guide the process

### ☐ General

- ALL Reports must be completed in the order as indicated in this document
- Public Holidays and weekends are excluded from Calculation of the End of Probation date
- Only Working days apply

- Reports must be completed and signed off with-in 10 working days of the previous Quarter
- Reminder e-mails will be sent 10 working days before the end of the Quarter
- There-after, reminder emails will follow 20 working days after the end of the previous Quarter
- Reports may be un-signed; however a previous Report may not be unsigned if a later Report is signed.
- None of the Reports will be Disputed
- Process moves to VRP 21 once either 4<sup>th</sup> or 5<sup>th</sup> Report is signed-off and Probation is Not extended
- Process moves to **Poor Performance** after the Sixth Report is signed-off by both Employee/Probationer and People Manager/Supervisor and Probation is to be Extended.
- People Manager/Supervisor cannot unconfirm leave if PPU ADMIN has already confirmed leave
- PPU ADMIN cannot confirm leave if People Manager/Supervisor has not confirmed leave
- PPU ADMIN, and People Manager/Supervisor cannot confirm leave, and the VRP21 cannot be signed off unless the:
  - PA has been completed
  - Induction training has been completed
  - All four (or 5 or 6 depending on extensions) have been signed off
  - Each of the abovementioned will be indicated as ✓ (if met), otherwise it will be indicated as X (If Not completed)
- The process may NOT move to the next Report if the Previous report is still un-signed by both People Manager/Supervisor and Employee/Probationer
- People Manager/Supervisor cannot confirm leave unless at least one document has been uploaded as evidence (if there are additional leave days captured)
- No changes are allowed on any of the reports if either the People Manager/Supervisor or PPU ADMIN has confirmed the leave
- No changes are allowed if on any of the reports or the VRP21 if the VRP21 is signed off
- User/Employee/Probationer/Probationer refers to the same Role as mentioned in this document

### 3. PERMIS Landing Page

Note that when People Manager/Supervisor selects Employee/Probationer, Both the People Manager/Supervisor and Employee/Probationer credentials appear.

Go to the following Menu Options for system access and use:

| Role                        | Menu Option                                     | Function                                                                                                                                                                                                                                                                                                                |
|-----------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| People Manager/Supervisors: | Employee/Probationers,<br>then PROBATIONERS tab | <ul style="list-style-type: none"> <li>- Search Option to find the Employee</li> <li>- Update KRAs</li> <li>- Complete the Quarterly Reports</li> <li>- Sign-off the Quarterly Report</li> <li>- Update &amp; Confirm leave on the VRP21 tab</li> <li>- Sign-off the VRP21 and produce Section13 Certificate</li> </ul> |

Employee/Probationers:

Probation

Complete and sign the Quarterly Reports

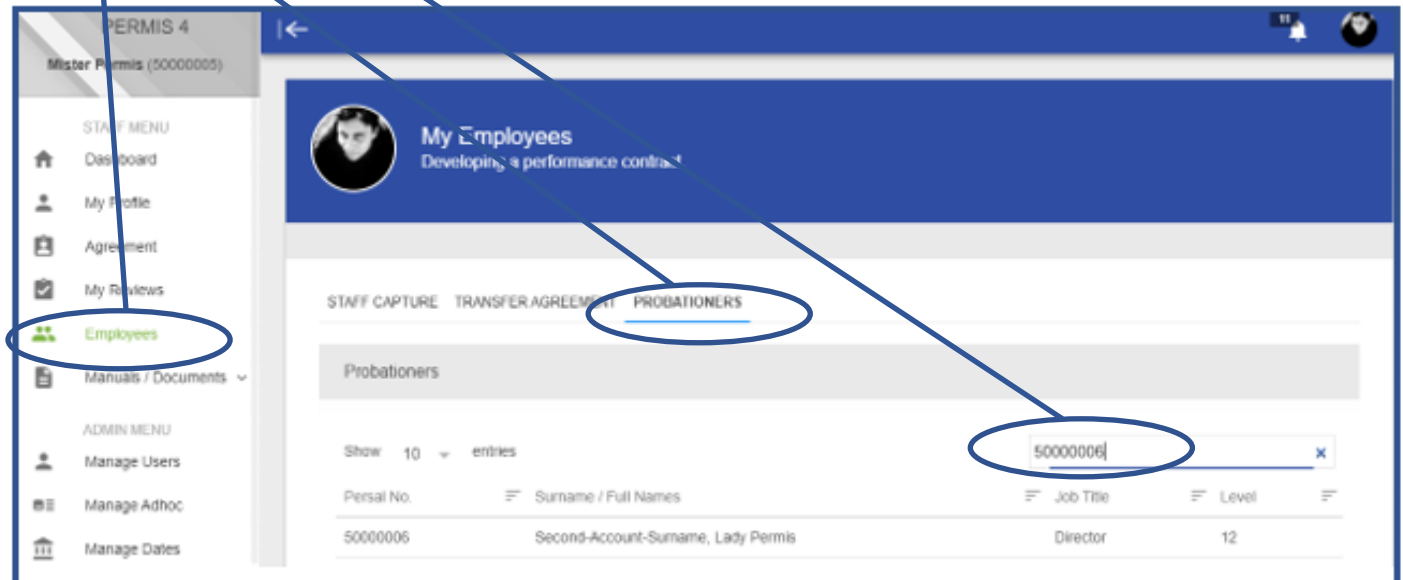
PPU ADMIN:

VRP21

Leave updates

Confirm the VRP21 and Print Reports

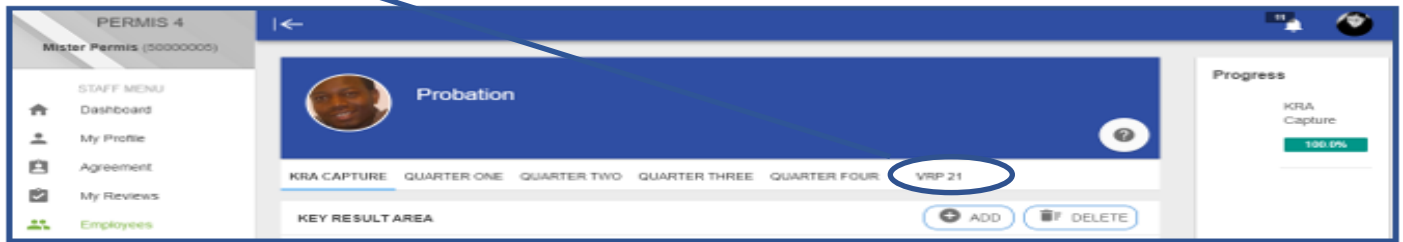
## People Manager/Supervisor Access



## Employee/Probationer Access



## PPU ADMIN Admin Access



## 4. Step by Step Guide

### 1. PERSAL Download creates User record

#### PERMAL Download and Initiation email

#### Record Creation On PERMIS

##### Steps

- PERSAL File Received from HR containing Probationers
- File is Downloaded by Ce-I
- Once Downloaded, Probation email will go Employee/Probationer/s
- See example

Initiation  
email

Wed 4/02/2020 0:15 AM  
P  
Permis  
Appointment on Probation  
To: Sando D Fortun  
Cc: Sando D Fortun  
If there are problems with how this message is displayed, click here to view it in a web browser.

Dear Mrs Lady Permis Second-Account-Surname

**APPOINTMENT ON PROBATION FOR THE PERIOD 01 OCTOBER 2019 TO 30 SEPTEMBER 2020**

We wish to congratulate you on your appointment in the post of DIRECTOR within the Department of the Premier with effect from 01 October 2019.

Kindly note that, in terms of the provisions of section 68(1) of the Public Service Regulations (PSR), 2016, you are required to serve a probationary period of 12 calendar months, starting from 01 October 2019 until 30 September 2020. Your period of probation shall be extended in the event of:

1. Any leave taken during the 12 month period (the amount of leave days taken will be added to this period);
2. The period equivalent to the delay by you not signing your performance agreement on the due date as required in terms of section 72(1) of the PSR, 2016; and
3. The period required to comply with all other conditions to which your appointment is subjected to.

The following should be finalised before your appointment can be confirmed as permanent:

1. Performance Agreement - It is required of you to enter into a performance agreement within three calendar months from date of appointment and thereafter within two months of the beginning of each financial year;
2. Compulsory Induction Programme. Your attention is drawn to the stipulation in your appointment letter regarding the relevant Public Service Induction Programme. The successful attendance and completion of this programme will be your responsibility. The services of the Chief Directorate People Training and Empowerment (CD: PTE), Kromme Rhee, may be engaged for assistance.
3. Four (4) quarterly reports to be completed during the 12-month period:

| Report        | Reporting Period From | Reporting Period To | Due Date          |
|---------------|-----------------------|---------------------|-------------------|
| First Report  | 01 October 2019       | 31 December 2019    | 31 December 2019  |
| Second Report | 01 January 2020       | 31 March 2020       | 31 March 2020     |
| Third Report  | 01 April 2020         | 30 June 2020        | 30 June 2020      |
| Fourth Report | 01 July 2020          | 30 September 2020   | 30 September 2020 |

4. On completion of your probationary period, a VRP21 certificate will be issued, which needs to be signed off by your people manager/supervisor and relevant SMS member.

Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.

## 2. Login to PERMIS V4 Account details - **NEW** Employee/Probationer

Employee/Probationer logs on to PERMIS and Sign in to PERMIS



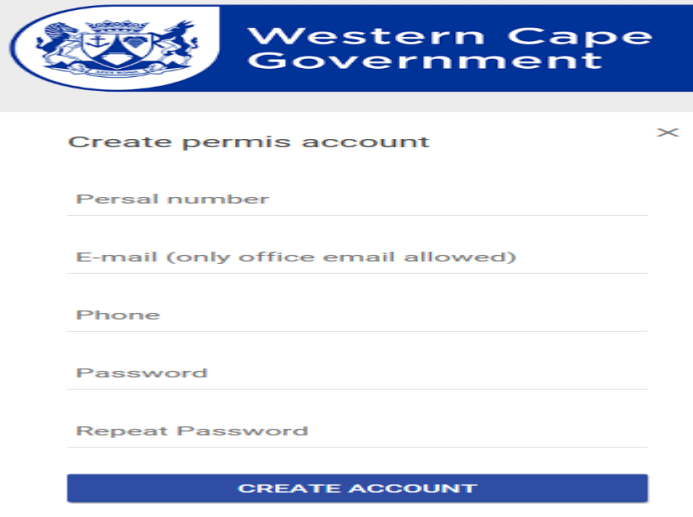
The screenshot shows the Western Cape Government PERMIS login interface. At the top is the Western Cape Government logo and name. Below it, the PERMIS logo and full name 'Performance Management Information System' are displayed. The login form includes a 'Username' field with callout 2, a 'Password' field with callout 3, and a blue 'SIGN IN' button. Below the button are three links: 'New user' (with callout 4), 'Reset password', and 'Need help?'.

### Steps

1. Employee/Probationer goes to PERMIS screen
2. Enter your PERSAL number in the Username field
3. Enter your PERMIS or machine password in the Password field
4. Click on New user

## 3. Create Employee/Probationer's account

Employee/Probationer logs on to PERMIS and Create his or her Account



**Western Cape Government**

Create permis account

Persal number

E-mail (only office email allowed)

Phone

Password

Repeat Password

**CREATE ACCOUNT**

### Steps

- Go to PERMIS
- Type in your PERSAL number
- Type in your WCG email address
- Type in your work telephone number
- Type in your password for your new account (Password should contain a combination of Capital and Lowercase letters as well as number)
- Re-type the password
- Click on the **Create Account** button

## 4. Login to PERMIS V4 Account details - **EXISTING** Employee/Probationer

Employee/Probationer logs on to PERMIS and signs in to PERMIS



**Western Cape Government**

**PERMIS**  
Performance Management Information System

Username

Password

**SIGN IN**

[New user](#) [Reset password](#) [Need help?](#)

### Steps

1. Employee/Probationer goes to PERMIS screen
2. Enter your PERSAL number in the Username field
3. Enter your PERMIS or machine password in the Password field
4. Click on Sign In
5. Account has already been created

## 5. Create the Performance Agreement

### Employee/Probationer logs on to PERMIS and Create his/her Performance Agreement

#### Steps

- See User Manuals for setting up Annual Assessment, to select your Supervisor/People Manager
- Follow the following steps:
  - Create a New Performance Agreement as well
  - Create a New Performance Agreement: Select Supervisor



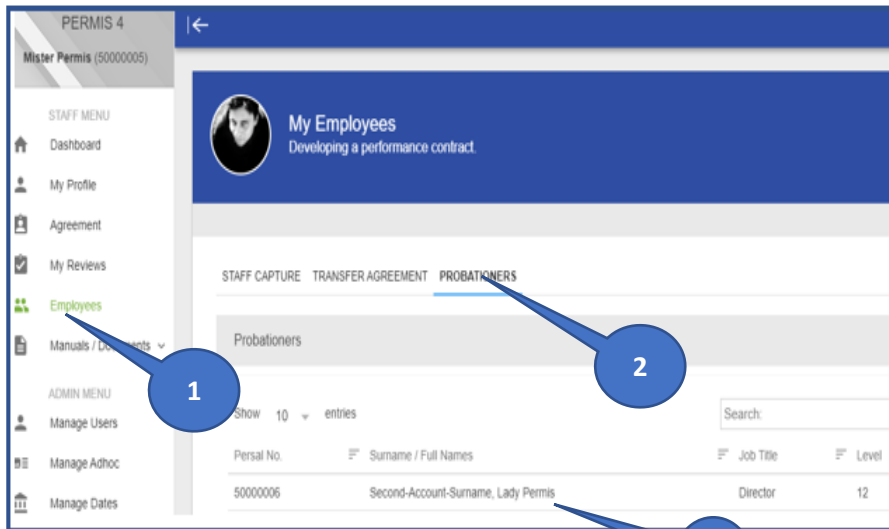
Permis V4  
Performance Agreeen ,

- **Don't setup KRA's**

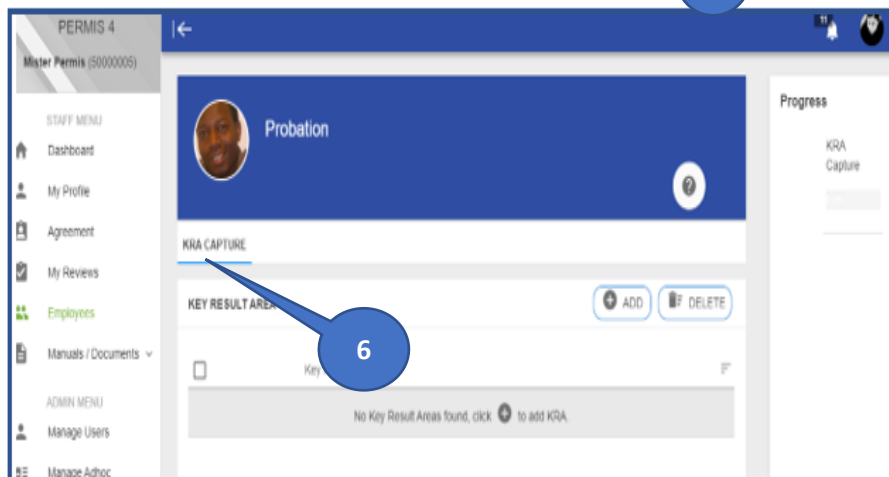
## 6. KRA Setup: People Manager/Supervisor setup KRA

### People Manager/Supervisor logs on to PERMIS

#### People Manager/Supervisor Screen



#### Employee/Probationer Screen



#### Steps

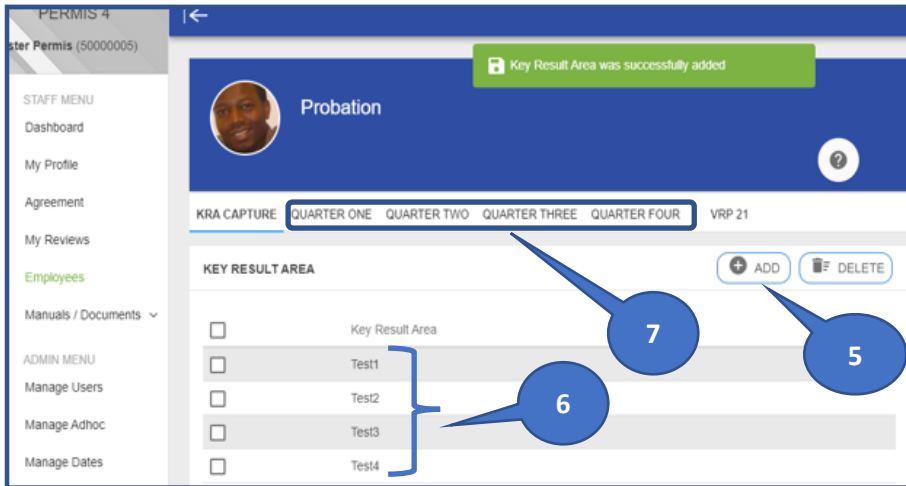
1. People Manager/Supervisor goes to Employee/Probationers Menu option on the Landing Page
  2. Click on PROBATIONERS tab
  3. List of Probationers under your Supervision will appear
  4. Select Employee/Probationer
  5. Employee/Probationer Probation Screen opens
  6. No Quarterly Reports to show, Only the KRA tab to be completed by the People Manager/Supervisor
- Quarterly reports do not show

## 7. KRA Setup: People Manager/Supervisor captures KRA's

People Manager/Supervisor logs on to PERMIS and Captures KRA's

### Steps

1. People Manager/Supervisor navigates to the KRA CAPTURE option on the Employee/Probationers Menu option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Employee/Probationer Probation Screen opens
5. Click on Add
6. Capture KRAs
7. Quarterly reports Show
8. At least 4 KRAs must be captured



PERMIS 4

Master Perm (50000005)

STAFF MENU

- Dashboard
- My Profile
- Agreement
- My Reviews
- Employees
- Manuals / Documents

ADMIN MENU

- Manage Users
- Manage Adhoc
- Manage Dates

Key Result Area was successfully added

Probation

KRA CAPTURE

QUARTER ONE QUARTER TWO QUARTER THREE QUARTER FOUR VRP 21

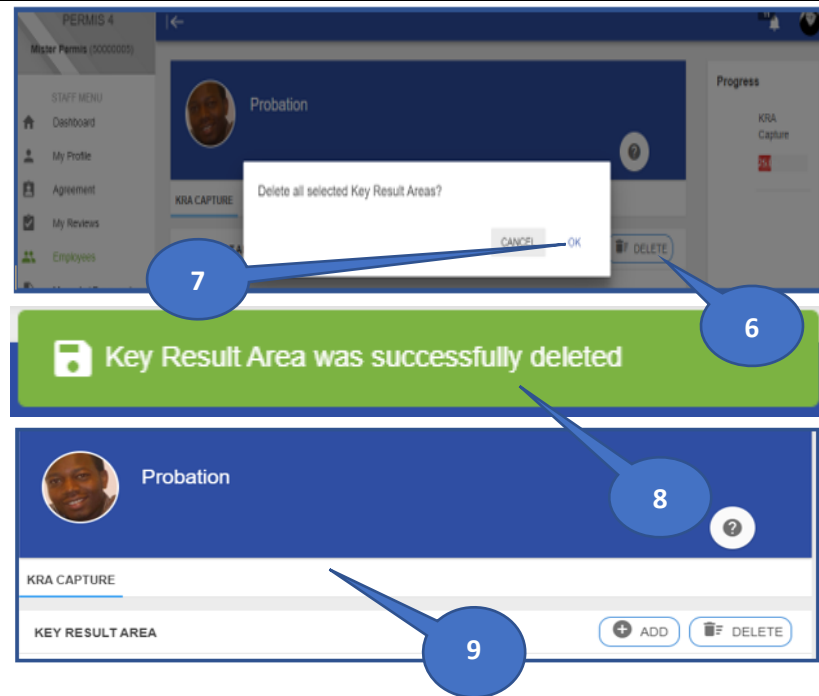
KEY RESULT AREA

+ ADD - DELETE

|                          | Key Result Area |
|--------------------------|-----------------|
| <input type="checkbox"/> | Test1           |
| <input type="checkbox"/> | Test2           |
| <input type="checkbox"/> | Test3           |
| <input type="checkbox"/> | Test4           |

## 8. KRA Setup: Delete KRAs

People Manager/Supervisor logs on to PERMIS and deletes KRAs



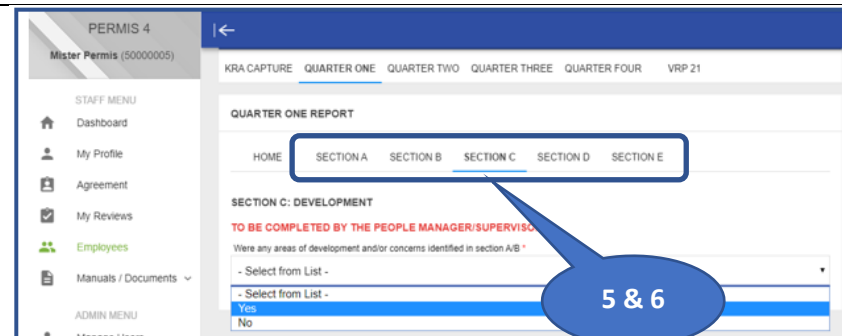
### Steps

1. People Manager/Supervisor navigates to the KRA CAPTURE option on the Employee/Probationers Menu option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Employee/Probationer Probation Screen opens
5. KRA Capture screen appears
6. Click on Delete
7. Click on ok
8. Message displays
9. All KRAs and Quarterly report tabs disappear

## Quarter One Steps

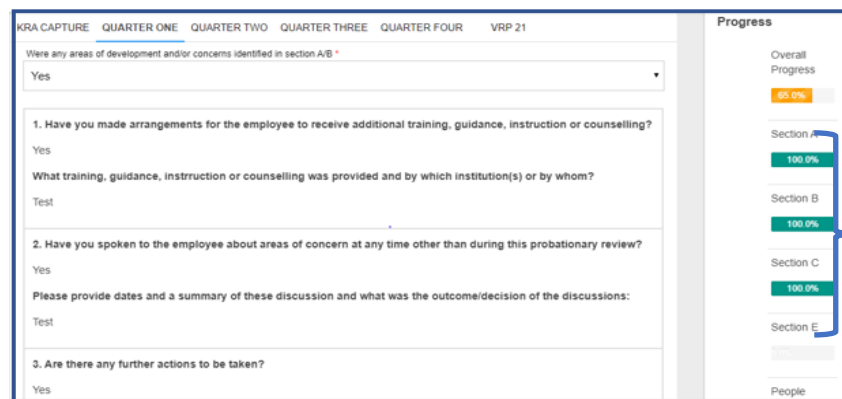
### 9. Quarter One Report: People Manager/Supervisor Completes Section A-C

#### People Manager/Supervisor logs on to PERMIS and Completes Sections A-C of Quarter One Report

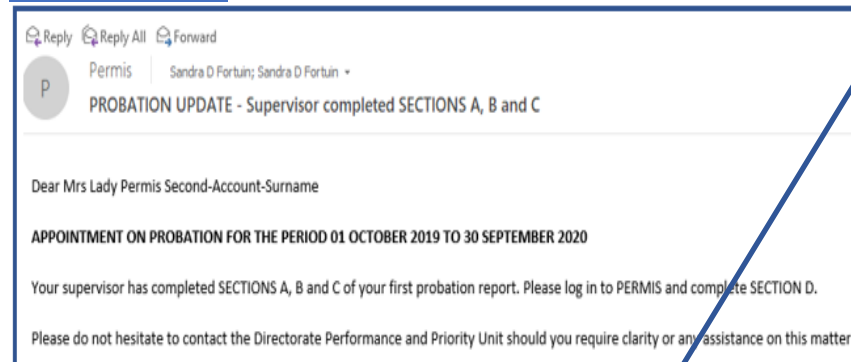


#### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter One
5. Complete fields in Section A, B and C
6. On Section C, Make selection Yes/No
7. Saved message appears
8. Fields on each Section must be completed until progress shows 100%
9. Once on 100 %, Notification goes to Employee/Probationer to complete Section D



#### Email Notification



#### Comments

**Sections A, B and C may be completed randomly as follows:**

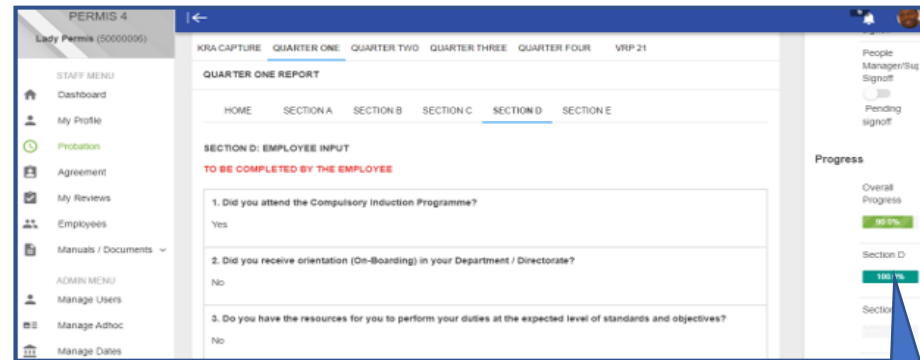
#### **Method for Completion of Quarterly Reports - CHECK**

- Section A: Rating is compulsory for all questions, but an answer to please elaborate is not.
- Section B- Both the rating and the comments are compulsory for all questions
- Section C- All questions will only be compulsory where areas of development were identified
- Question 4: NOT Displayed for Q1 & Q2
- Compulsory Fields Indicated as red asterisk (\*)

## 10. Quarter One Report: Employee/Probationer completes Section D

Employee/Probationer logs on to PERMIS and Complete Section D

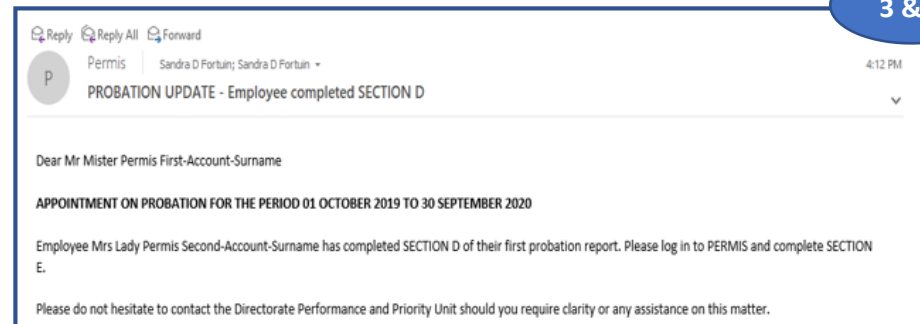
### Section D on 100%



### Steps

1. Employee/Probationer goes to Probation Menu option on the Landing Page
2. Select Quarter One
3. Complete fields in Section D
4. Fields for this Section must be completed until progress shows 100%
5. Once on 100 %, the email Notification will to the People Manager/Supervisor to complete Section E (comments)

### Email Notification



### Comments

#### Method for Completion of Quarterly Reports - CHECK

- Section D- All questions are compulsory
- Compulsory Fields Indicated as red asterisk (\*)

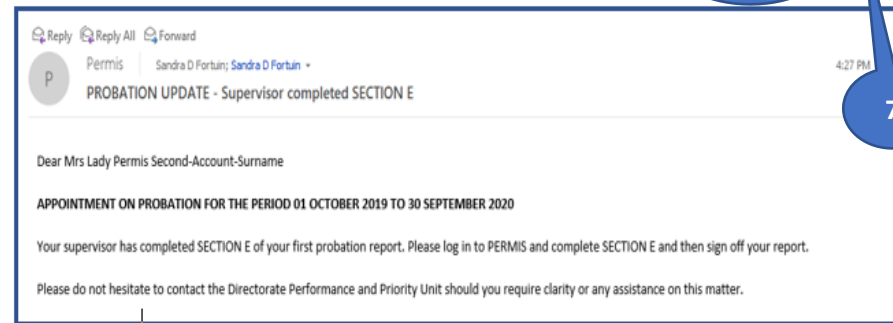
## 11. Quarter One Report: People Manager/Supervisor completes Section E (Comments)

### People Manager/Supervisor Logs on to PERMIS and Completes Section E



5 & 6

#### Notification:



7

8

#### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter One
5. Complete Section E (Comments)
6. Click Save Comments
7. Progress shows 100%
8. The email Notification will go to the Employee/Probationer to complete Section E (Comments) and sign-off Q1 report

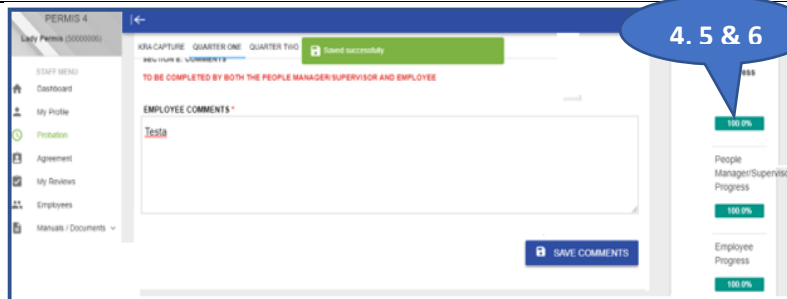
#### Comments

##### Method for Completion of Quarterly Reports - CHECK

- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.
- Compulsory Fields Indicated as red asteris (\*)

## 12. Quarter One Report: Employee/Probationer completes Section E (Comments) and sign-off Quarter One report

### Employee/Probationer Logs on to PERMIS, Completes Section E and signs-off



PERMIS 4  
Lady Permis (50000000)

STAFF MENU  
Dashboard  
My Profile  
Probation  
Agreement  
My Reviews  
Employees  
Manuals / Documents

KRA CAPTURE QUARTER ONE QUARTER TWO  
TO BE COMPLETED BY BOTH THE PEOPLE MANAGER/SUPERVISOR AND EMPLOYEE

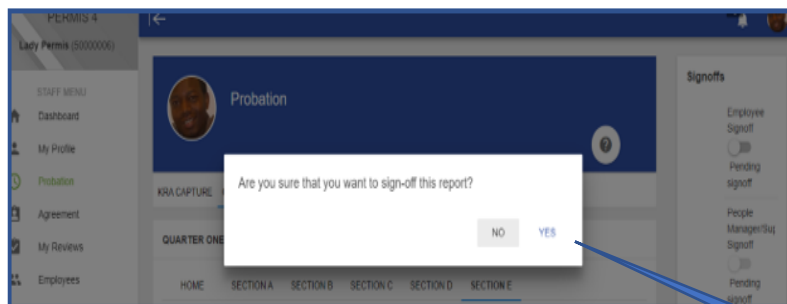
EMPLOYEE COMMENTS  
Testa

SAVE COMMENTS

100 0%

People Manager/Supervisor Progress  
100 0%

Employee Progress  
100 0%



PERMIS 4  
Lady Permis (50000000)

STAFF MENU  
Dashboard  
My Profile  
Probation  
Agreement  
My Reviews  
Employees

Probation

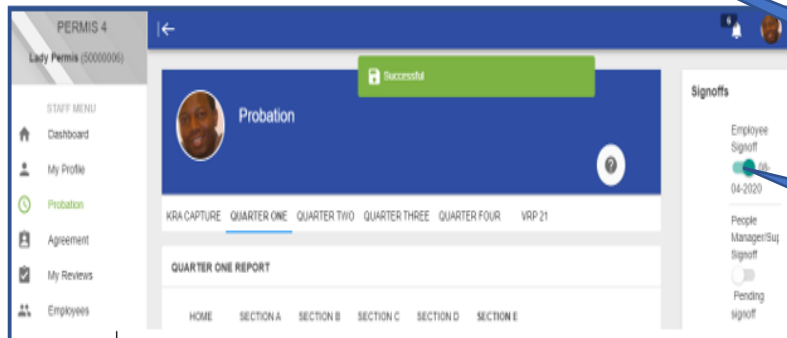
KRA CAPTURE  
QUARTER ONE

Are you sure that you want to sign-off this report?

NO YES

HOME SECTION A SECTION B SECTION C SECTION D SECTION E

Signoffs  
Employee Signoff  
Pending signoff  
People Manager/Sup Signoff  
Pending signoff



PERMIS 4  
Lady Permis (50000000)

STAFF MENU  
Dashboard  
My Profile  
Probation  
Agreement  
My Reviews  
Employees

Probation

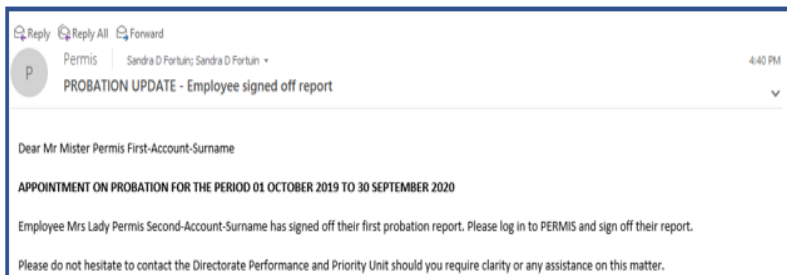
KRA CAPTURE QUARTER ONE QUARTER TWO QUARTER THREE QUARTER FOUR VRP 21

QUARTER ONE REPORT

HOME SECTION A SECTION B SECTION C SECTION D SECTION E

Signoffs  
Employee Signoff  
04-2020  
People Manager/Sup Signoff  
Pending signoff

### Email Notification:



Reply Reply All Forward

Permis Sandra D Fortuin; Sandra D Fortuin + 4:40 PM

PROBATION UPDATE - Employee signed off report

Dear Mr Mister Permis First-Account-Surname

APPOINTMENT ON PROBATION FOR THE PERIOD 01 OCTOBER 2019 TO 30 SEPTEMBER 2020

Employee Mrs Lady Permis Second-Account-Surname has signed off their first probation report. Please log in to PERMIS and sign off their report.

Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.

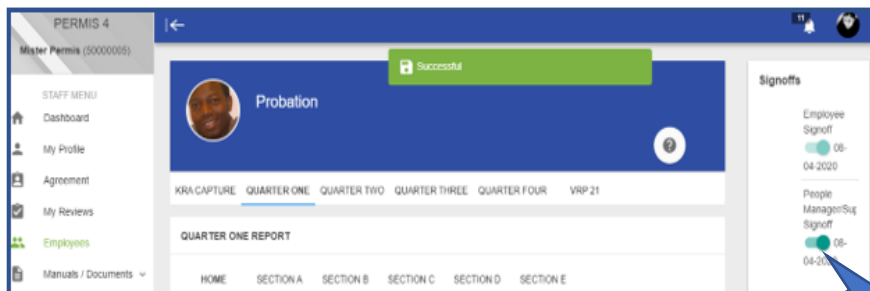
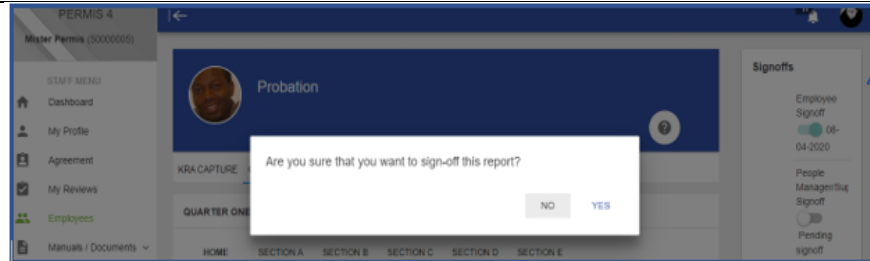
### Steps

1. Employee/Probationer goes to the Probation Menu Option on the Landing Page
2. Click on Quarter One
3. Click on Section E
4. Complete Employee/Probationer Section E (Comments)
5. Save Comments
6. Progress shows 100%
7. Click on Employee/Probationer sign-off
8. Click on Yes
9. Successful message appears
10. Screen shows Employee/Probationer signed-off
11. The email Notification goes to the People Manager/Supervisor to sign-off

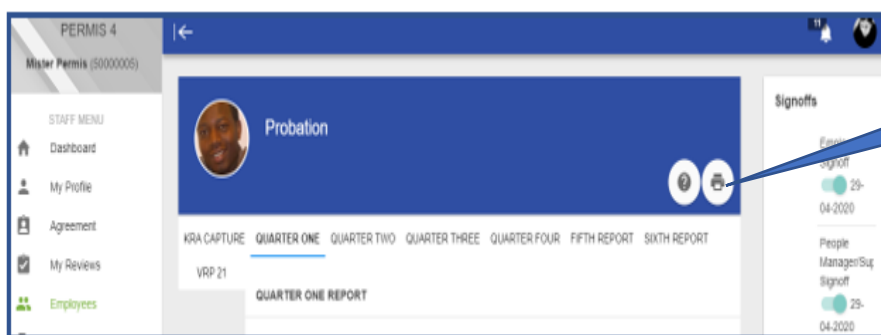
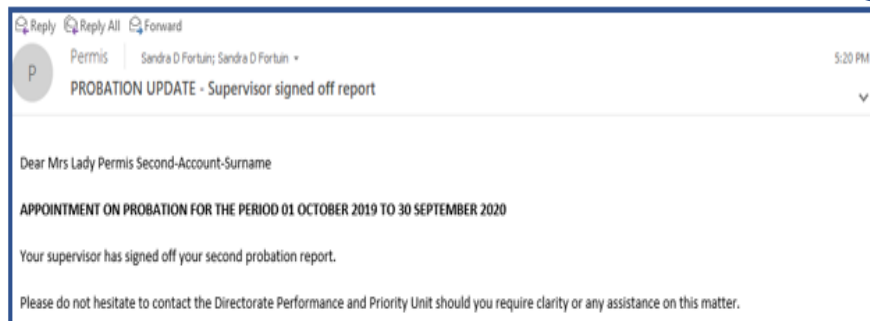
## 13. Quarter One Report: People Manager/Supervisor signs-off Quarter One Report Employee/Probationer signed-off

People Manager/Supervisor logs on to PERMIS and sign-off the report

6, 7 & 8



### Email Notification:



### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter One
5. Overall Progress is 100 %
6. Click on People Manager/Supervisor sign-off
7. Click on Yes
8. Successful message appears
9. The email Notification goes to the Employee/Probationer to show that the People Manager/Supervisor signed-off the Q1 report
10. People Manager/Supervisor signed-off Q1 report
11. PDF Report may be printed and signed

### Comments

#### Method for Completion of Quarterly Reports - CHECK

- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.
- Compulsory Fields Indicated as red asteris (\*)

## 14. Quarter One Report: Employee/Probationer un-signs Quarter One report – People Manager/Supervisor is un-signed

Employee/Probationer logs on to PERMIS and un-signs the Report

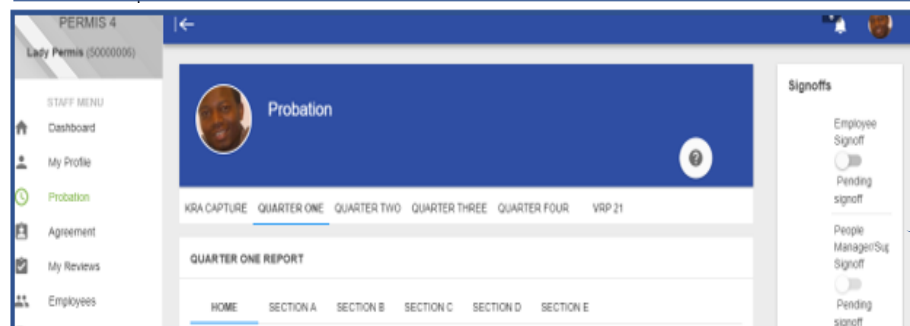
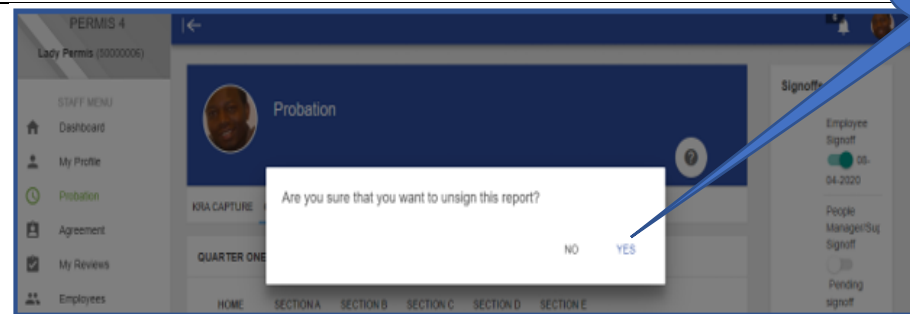
3 & 4

Steps

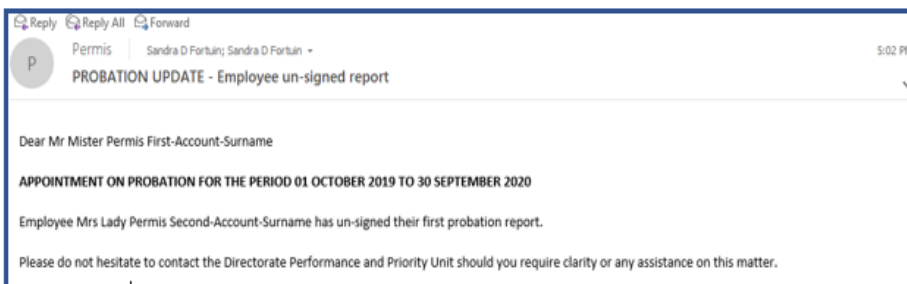
1. Employee/Probationer goes to the Probation Menu Option on the Landing Page
2. Click on Quarter One
3. Un-sign the report
4. Click on Yes
5. Q1 report shows un-signed
6. The email Notification will go to the People Manager/Supervisor to show that the Employee/Probationer un-signed the Report

5

6



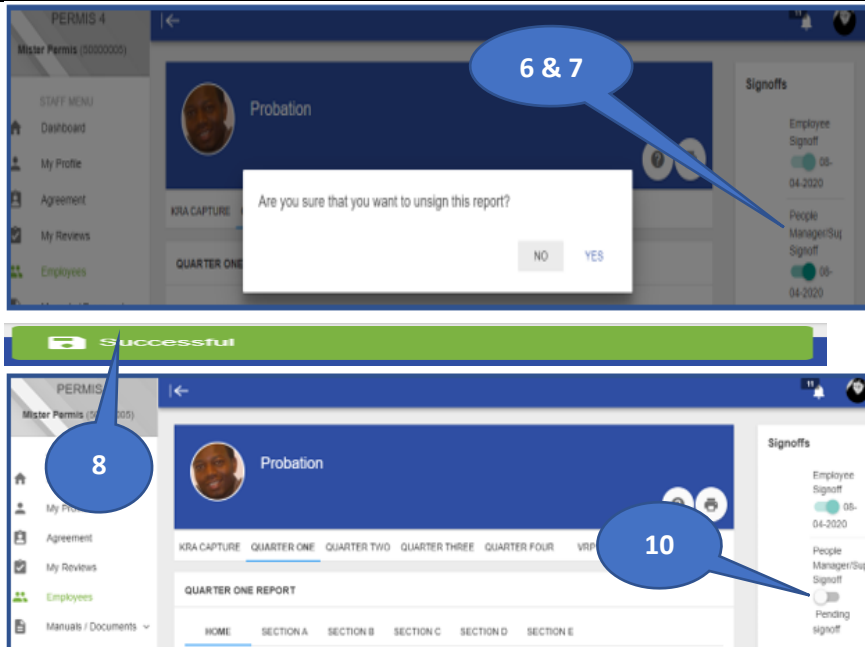
### Email Notification



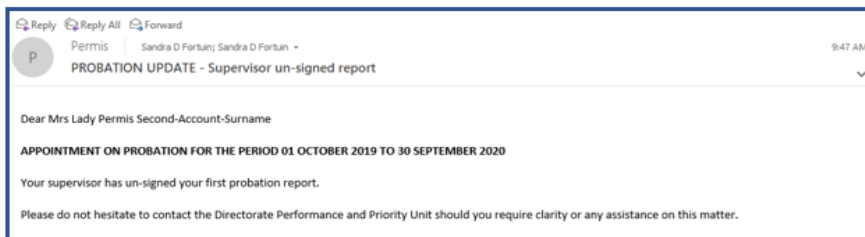
### Comments

## 15. Quarter One Report: People Manager/Supervisor un-signs Quarter One report – Employee/Probationer signed-off

People Manager/Supervisor signs on to PERMIS and un-signs the Report



### Email Notification:



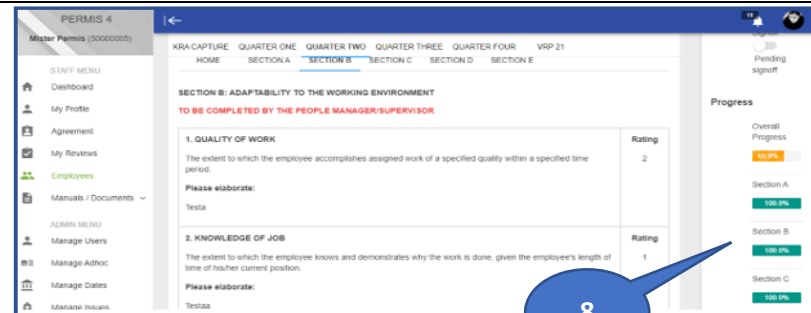
### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter One
5. Overall Progress is 100 %
6. Click on People Manager/Supervisor sign-off
7. Click on Yes for Un-sign message
8. Successful message appears
9. The email Notification goes to the Employee/Probationer to show that the People Manager/Supervisor un-signed the Q1 report
10. Report shows un-signed

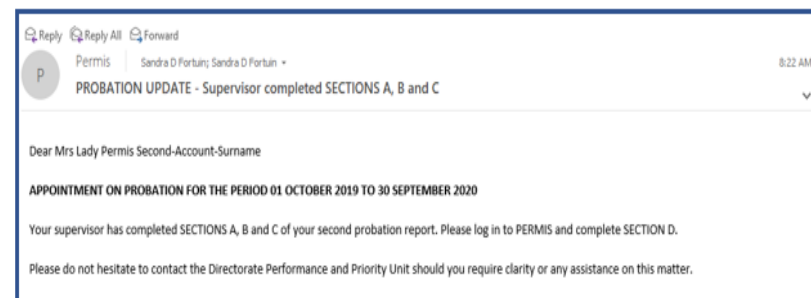
## Quarter Two Steps

### 16. Quarter Two Report: People Manager/Supervisor Completes Sections A-C

People Manager/Supervisor logs on to PERMIS and Complete Section A - C



#### Email Notification



#### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Two
5. Complete fields in Section A, B and C
6. On Section C, Make selection Yes/No
7. Saved message appears
8. Fields on each Section must be completed until progress shows 100%
9. Once on 100 %, the email Notification goes to Employee/Probationer to complete Section D

#### Comments

**Sections A, B and C may be completed randomly as follows:**

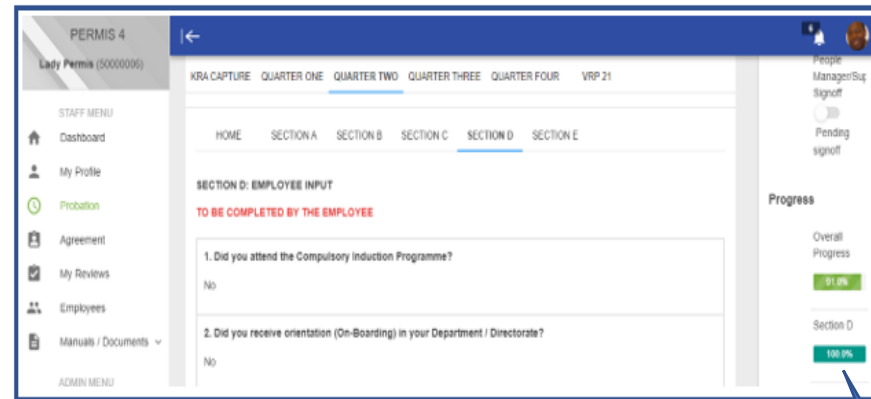
#### Method for Completion of Quarterly Reports - CHECK

- Section A: Rating is compulsory for all questions, but an answer to please elaborate is not.
- Section B- Both the rating and the comments are compulsory for all questions
- Section C- All questions will only be compulsory where areas of development were identified
- Question 4: NOT Displayed for Q1 & Q2
- Compulsory Fields Indicated as red asterisk (\*)

## 17. Quarter Two Report: Employee/Probationer completes Section D

### Employee/Probationer logs on to PERMIS and Complete Section D

#### Section D on 100%

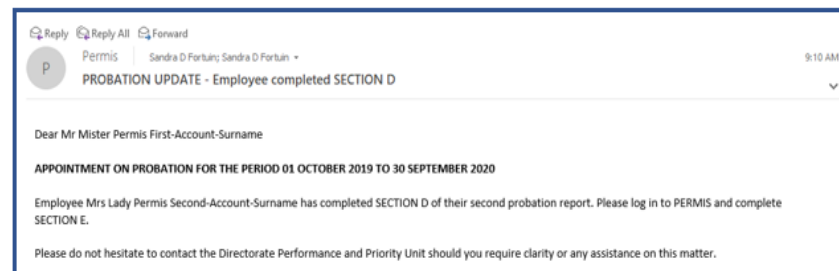


The screenshot shows the PERMIS 4 interface for a user named Lady Permis (50000006). The main menu on the left includes options like Dashboard, My Profile, Probation, Agreement, My Reviews, Employees, and Manuals / Documents. The top navigation bar shows quarters from Q1 to Q4, with Q2 selected. The main content area displays 'SECTION D: EMPLOYEE INPUT' with two questions: '1. Did you attend the Compulsory Induction Programme?' and '2. Did you receive orientation (On-Boarding) in your Department / Directorate?'. Both questions have 'No' selected. A progress bar on the right indicates 'Overall Progress' at 100% and 'Section D' at 100%.

#### Steps

1. Employee/Probationer goes to Probation Menu option on the Landing Page
2. Select Quarter Two
3. Complete fields in Section D
4. Fields for this Section must be completed until progress shows 100%
5. Once on 100 %, the email Notification goes to People Manager/Supervisor to complete Section E (comments)

#### Email Notification



The screenshot shows an email notification from Permis to Sandra D Fortuin. The subject is 'PROBATION UPDATE - Employee completed SECTION D'. The body of the email reads: 'Dear Mr Mister Permis First-Account-Surname', 'APPOINTMENT ON PROBATION FOR THE PERIOD 01 OCTOBER 2019 TO 30 SEPTEMBER 2020', 'Employee Mrs Lady Permis Second-Account-Surname has completed SECTION D of their second probation report. Please log in to PERMIS and complete SECTION E.', and 'Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.'

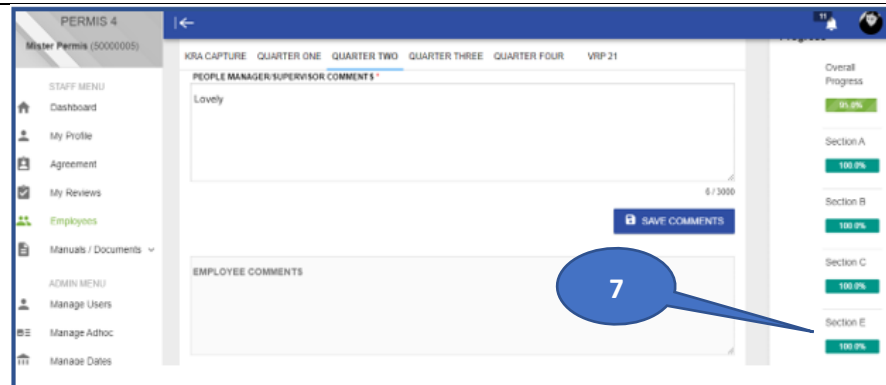
#### Comments

#### Method for Completion of Quarterly Reports - CHECK

- Section D- All questions are compulsory
- Compulsory Fields Indicated as red asterisk (\*)

## 18. Quarter Two Report: People Manager/Supervisor completes Section E (Comments)

People Manager/Supervisor logs on to PERMIS and Completes Section E



PERMIS 4

Mister Permis (5000005)

KRA CAPTURE QUARTER ONE QUARTER TWO QUARTER THREE QUARTER FOUR VRP 21

PEOPLE MANAGER/SUPERVISOR COMMENTS \*

Lovely

6 / 3000

SAVE COMMENTS

EMPLOYEE COMMENTS

Overall Progress: 95.0%

Section A: 100.0%

Section B: 100.0%

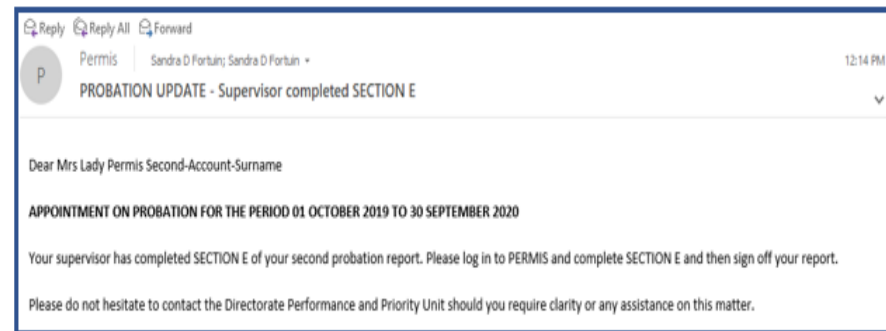
Section C: 100.0%

Section E: 100.0%

### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Two
5. Complete Section E (Comments)
6. Click Save Comments
7. Progress shows 100%
8. The email Notification goes to Employee/Probationer to complete Section E (Comments) and sign-off the Q2 report

### Email Notification:



Reply Reply All Forward

Permis Sandra D Fortuin; Sandra D Fortuin

12:14 PM

PROBATION UPDATE - Supervisor completed SECTION E

Dear Mrs Lady Permis Second-Account-Surname

APPOINTMENT ON PROBATION FOR THE PERIOD 01 OCTOBER 2019 TO 30 SEPTEMBER 2020

Your supervisor has completed SECTION E of your second probation report. Please log in to PERMIS and complete SECTION E and then sign off your report.

Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.

### Comments

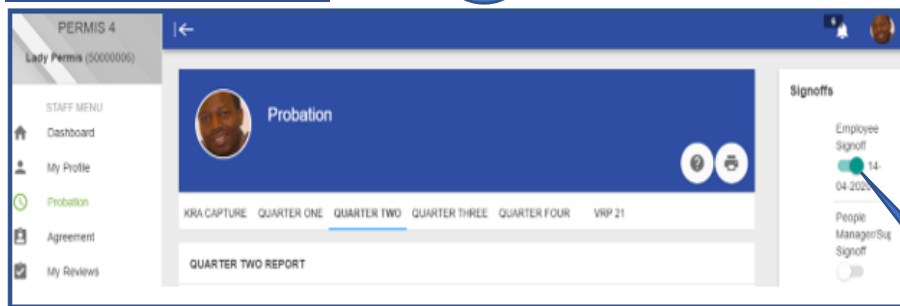
#### Method for Completion of Quarterly Reports - CHECK

- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.
- Compulsory Fields Indicated as red asteris (\*)

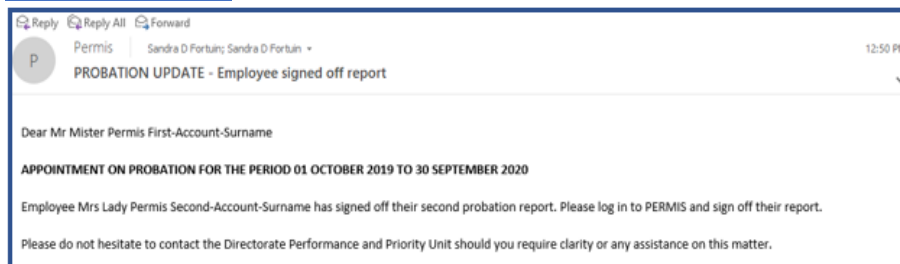
## 19. Quarter Two Report: Employee/Probationer completes Section E (Comments) and sign-off Quarter Two report

### Employee/Probationer logs on to PERMIS, Completes Section E and sign-off





### Email Notification:



### Steps

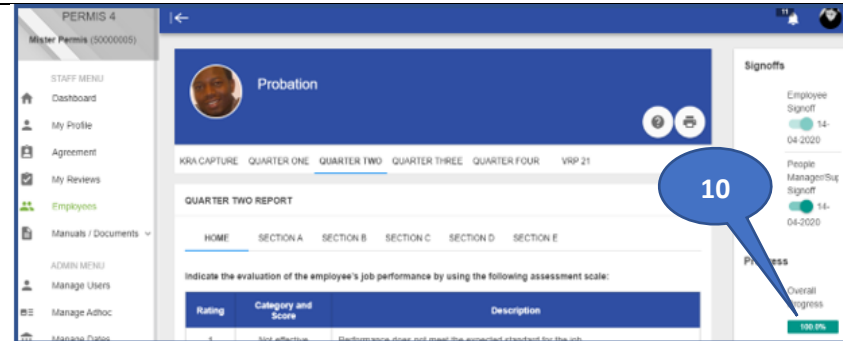
1. Employee/Probationer goes to the Probation Menu Option on the Landing Page
2. Click on Quarter Two
3. Click on Section E
4. Complete Employee/Probationer Section E (Comments)
5. Save Comments
6. Progress shows 100%
7. Click on Employee/Probationer sign-off
8. Click on Yes
9. Successful message appears
10. Employee/Probationer signed-off
11. The email Notification goes to People Manager/Supervisor to sign-off

10

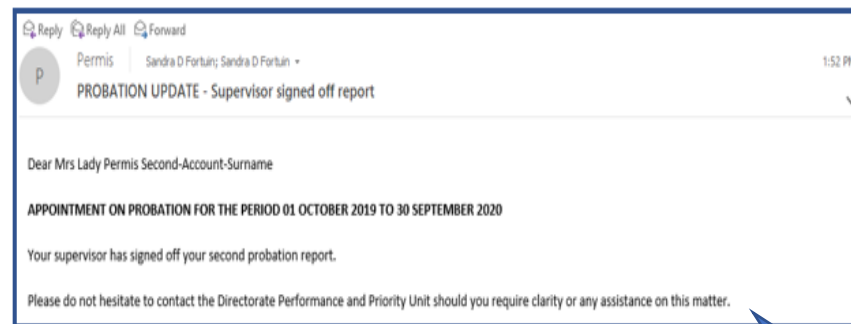
11

## 20. Quarter Two Report: People Manager/Supervisor signs-off Quarter Two report – Employee/Probationer signed-off

**People Manager/Supervisor log on to PERMIS and sign-off the Report**



### Email Notification:



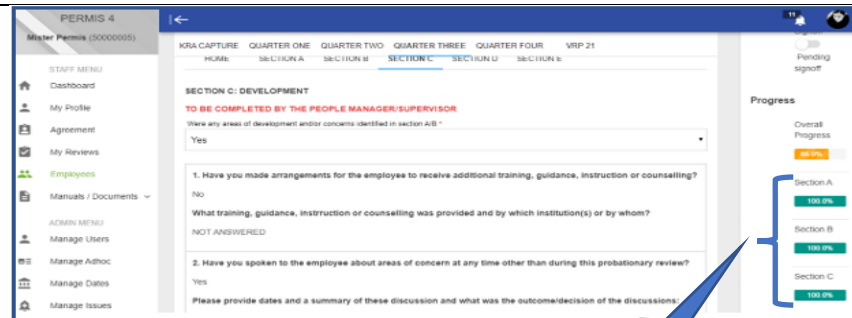
### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Two
5. Overall Progress is 100 %
6. Click on People Manager/Supervisor sign-off
7. Click on Yes
8. Successful message appears
9. The email Notification goes to the Employee/Probationer to show that the Q2 report was signed-off
10. People Manager/Supervisor signed-off Q2 report
11. PDF Report may be printed and signed

## Quarter THREE Steps

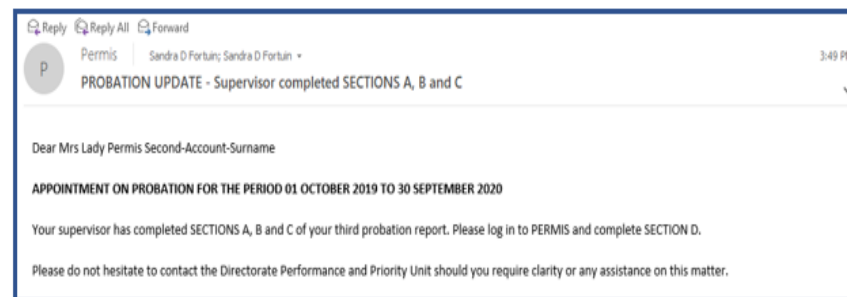
### 21. Quarter Three Report: People Manager/Supervisor Completes Section A-C

People Manager/Supervisor logs on to PERMIS and Completes Sections A - C



#### Email Notification

C



#### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Three
5. Complete fields in Section A, B and C
6. On Section C, Make selection Yes/No
7. Answer Question 4
8. Saved messages appear
9. Fields on each Section must be completed until progress shows 100%
10. Once on 100 %, the email Notification goes to Employee/Probationer to complete Section D

**Check: Question 4 on Section C is displayed for Q3**

**Question 4 is for People Manager/Supervisor to intervene and assist**

#### Comments

Sections A, B and C may be completed randomly as follows:

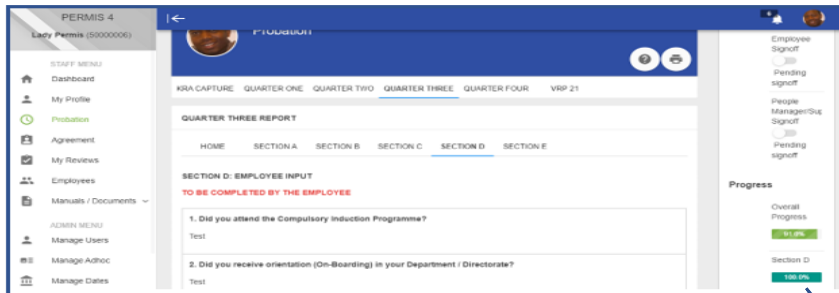
#### Method for Completion of Quarterly Reports - CHECK

- Section A: Rating is compulsory for all questions, but an answer to please elaborate is not.
- Section B- Both the rating and the comments are compulsory for all questions
- Section C- All questions will only be compulsory where areas of development were identified
- **Question 4: Displayed for Q3**
- Compulsory Fields Indicated as red asterisk (\*)

## 22. Quarter Three Report: Employee/Probationer completes Section D

### Employee/Probationer signs on to PERMIS and Completes Section D

#### Section D on 100%



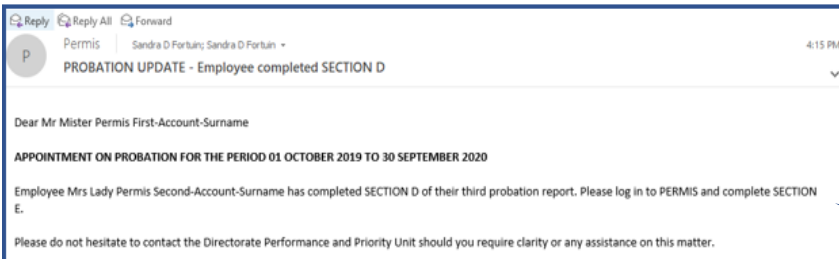
#### Steps

1. Employee/Probationer goes to Probation Menu option on the Landing Page
2. Select Quarter Three
3. Complete fields in Section D
4. Fields for this Section must be completed until progress shows 100%
5. Once on 100 %, the email Notification goes to People Manager/Supervisor to complete Section E (comments)

3 & 4

5

#### Email Notification



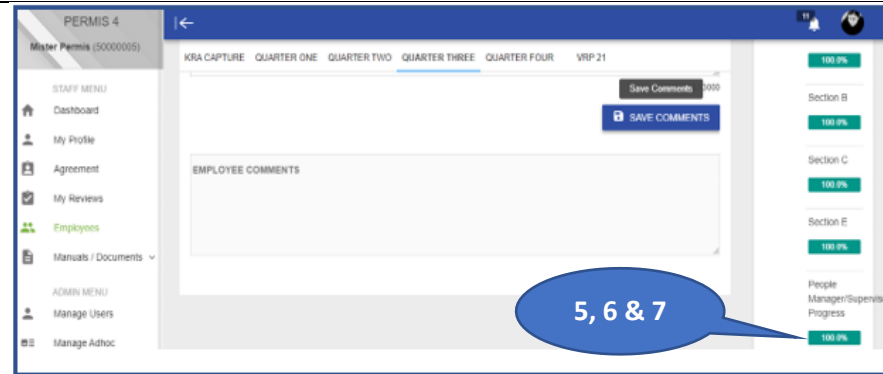
#### Comments

#### Method for Completion of Quarterly Reports - CHECK

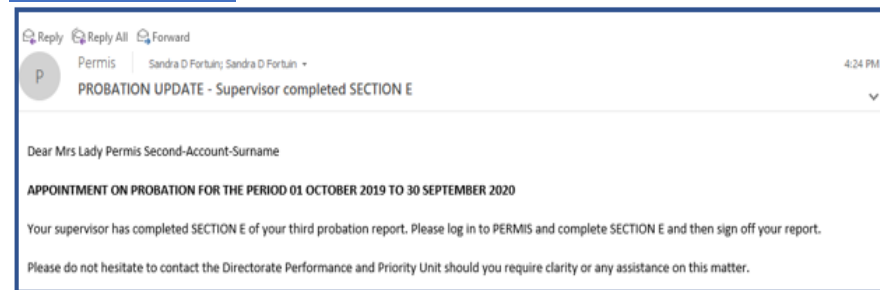
- Section D- All questions are compulsory
- Compulsory Fields Indicated as red asterisk (\*)

## 23. Quarter Three Report: People Manager/Supervisor completes Section E (Comments)

### People Manager/Supervisor logs on to PERMIS and Completes Section E



### Email Notification:



### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Three
5. Complete Section E (Comments)
6. Click Save Comments
7. Progress shows 100%
8. The email Notification goes to the Employee/Probationer to complete Section E (Comments) and sign-off Q3 report

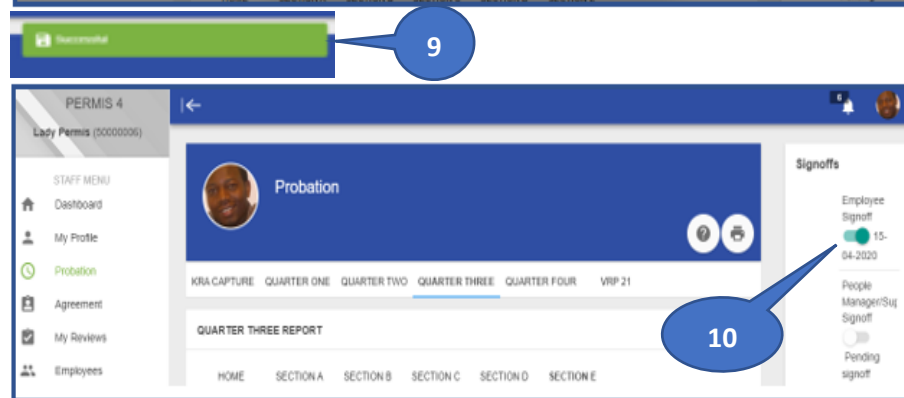
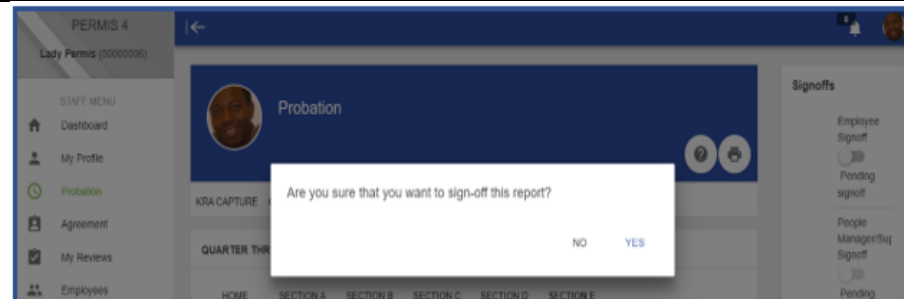
### Comments

#### Method for Completion of Quarterly Reports - CHECK

- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.
- Compulsory Fields Indicated as red asterisk (\*)

## 24. Quarter Three Report: Employee/Probationer completes Section E (Comments) and sign-off Quarter Three report

Employee/Probationer logs on to PERMIS, Completes Section E and signs-off the Report

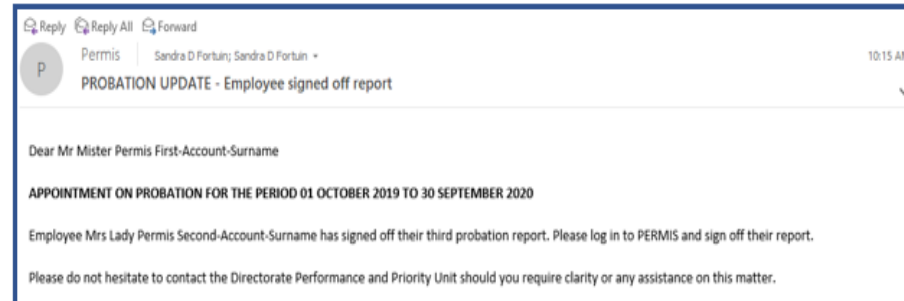


### Steps

7 & 8

1. Employee/Probationer goes to the Probation Menu Option on the Landing Page
2. Click on Quarter Three
3. Click on Section E
4. Complete Employee/Probationer Section E (Comments)
5. Save Comments
6. Progress shows 100%
7. Click on Employee/Probationer sign-off
8. Click on Yes
9. Successful message appears
10. Employee/Probationer signed-off
11. The email Notification goes to People Manager/Supervisor to sign-off the Report

### Email Notification:



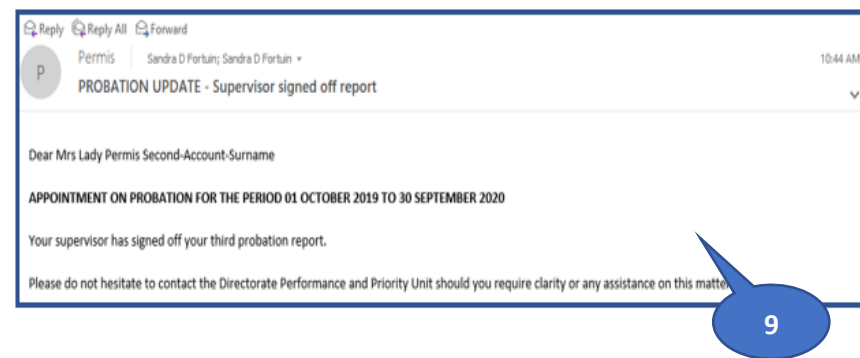
11

## 25. Quarter Three Report: People Manager/Supervisor signs-off Quarter Three report - Employee/Probationer signed-off

**People Manager/Supervisor logs on to PERMIS and signs-off the Report**



### Email Notification:



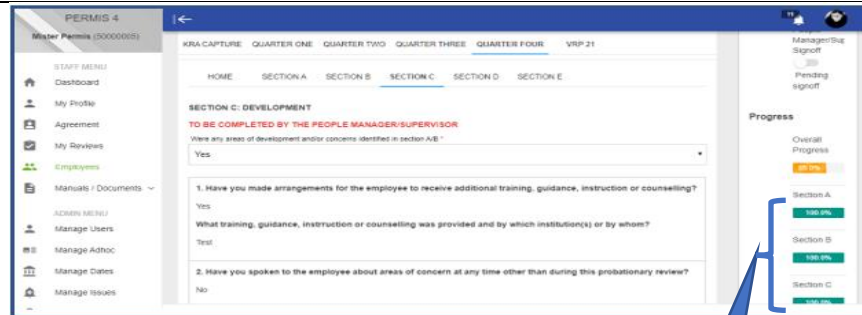
### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Three
5. Overall Progress is 100 %
6. Click on People Manager/Supervisor sign-off
7. Click on Yes
8. Successful message appears
9. The email Notification goes to the Employee/Probationer to show that the Q3 Report was signed-off
10. People Manager/Supervisor signed-off Q3 report
11. PDF Report may be printed and signed

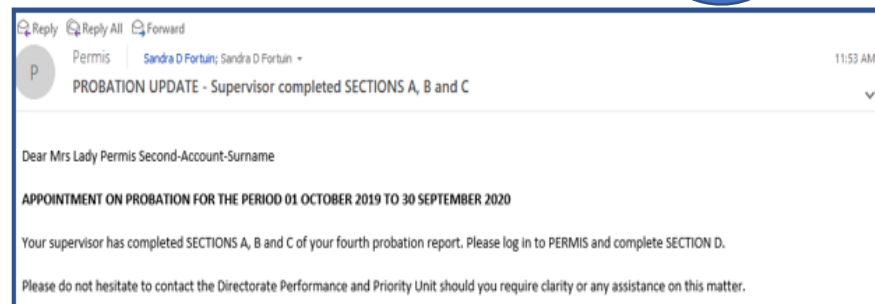
## Quarter Four Steps

### 26. Quarter Four Report: People Manager/Supervisor Completes Sections A-C

People Manager/Supervisor logs on to PERMIS and Completes Sections A -C



#### Email Notification



#### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Four
5. Complete fields in Section A, B and C
6. On Section C, Make selection Yes/No
7. Saved message appears
8. Fields on each Section must be completed until progress shows 100%
9. Once on 100 %, the email Notification goes to Employee/Probationer to complete Section D

#### Comments

**Sections A, B and C may be completed randomly as follows:**

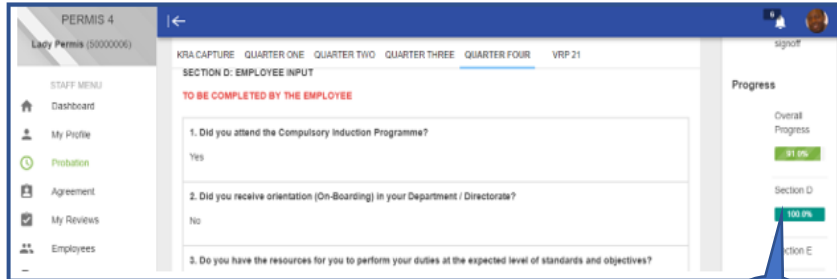
#### Method for Completion of Quarterly Reports - CHECK

- Section A: Rating is compulsory for all questions, but an answer to please elaborate is not.
- Section B- Both the rating and the comments are compulsory for all questions
- Section C- All questions will only be compulsory where areas of development were identified
- Compulsory Fields Indicated as red asterisk (\*)

## 27. Quarter Four Report: Employee/Probationer completes Section D

### Employee/Probationer logs on to PERMIS and Completes Section D

#### Section D on 100%

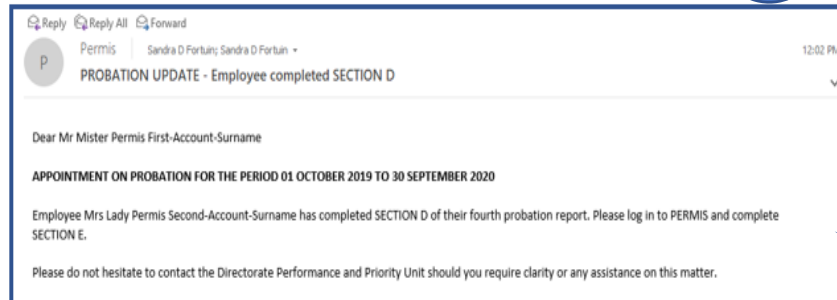


The screenshot shows the PERMIS 4 interface. The user is logged in as 'Lady Permis (50000000)'. The main menu on the left includes 'Dashboard', 'My Profile', 'Probation', 'Agreement', 'My Reviews', and 'Employees'. The main content area is titled 'SECTION D: EMPLOYEE INPUT' and contains three questions: '1. Did you attend the Compulsory Induction Programme?' (Yes), '2. Did you receive orientation (On-Boarding) in your Department / Directorate?' (No), and '3. Do you have the resources for you to perform your duties at the expected level of standards and objectives?'. The progress bar on the right shows 'Overall Progress' at 91.0% and 'Section D' at 100.0%. A blue callout bubble with the number '4' points to the 'Section D' progress bar.

#### Steps

1. Employee/Probationer goes to Probation Menu option on the Landing Page
2. Select Quarter Four
3. Complete fields in Section D
4. Fields for this Section must be completed until progress shows 100%
5. Once on 100 %, the email Notification will go to People Manager/Supervisor to complete Section E (comments)

#### Email Notification



The screenshot shows an email notification from 'Permis' to 'Sandra D Fortun; Sandra D Fortun'. The subject is 'PROBATION UPDATE - Employee completed SECTION D'. The email body contains the following text: 'Dear Mr Mister Permis First-Account-Surname', 'APPOINTMENT ON PROBATION FOR THE PERIOD 01 OCTOBER 2019 TO 30 SEPTEMBER 2020', 'Employee Mrs Lady Permis Second-Account-Surname has completed SECTION D of their fourth probation report. Please log in to PERMIS and complete SECTION E.', and 'Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.' A blue callout bubble with the number '5' points to the email body.

#### Comments

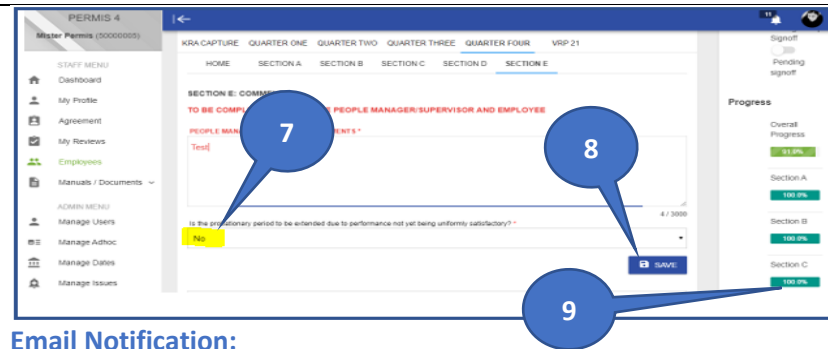
##### Method for Completion of Quarterly Reports - CHECK

- Section D- All questions are compulsory
- Compulsory Fields Indicated as red asterisk (\*)

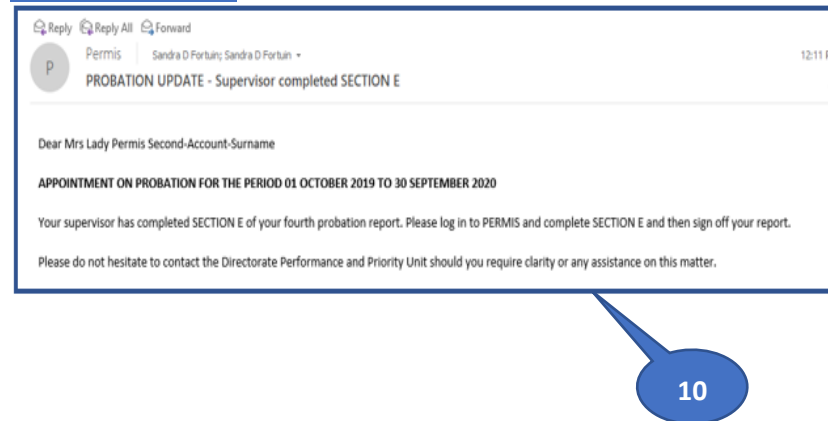
## 28. Quarter Four Report: People Manager/Supervisor completes Section E (Comments) – Select Extension is **No**

People Manager/Supervisor logs on to PERMIS and Completes Section E.

People Manager/Supervisor Selects either No (No for further Extension) or Yes (Yes for Probation to be Extended)



### Email Notification:



### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Four
5. Complete Section E (Comments)
6. Click Save Comments
7. Click **No** on Question "Is Probationary period to be extended..."
8. Click Save
9. Progress shows 100%
10. The email Notification goes to Employee/Probationer to complete Section E (Comments) and sign-off Q4 report

**Note:** If **No** is Selected for Probation Period Extension, the process will move to the VRP21 process.

### Comments

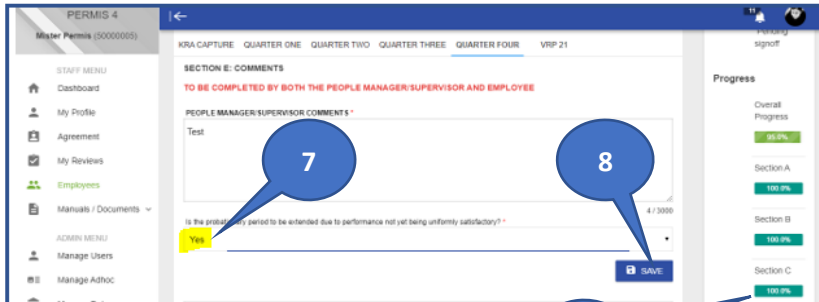
#### Method for Completion of Quarterly Reports - CHECK

- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.
- Compulsory Fields Indicated as red asterisk (\*)

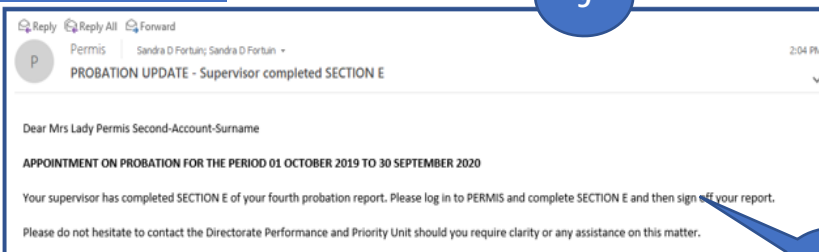
## 29. Quarter Four Report: People Manager/Supervisor completes Section E (Comments) – Select Extension is **Yes**

People Manager/Supervisor logs on to PERMIS and Completes Section E.

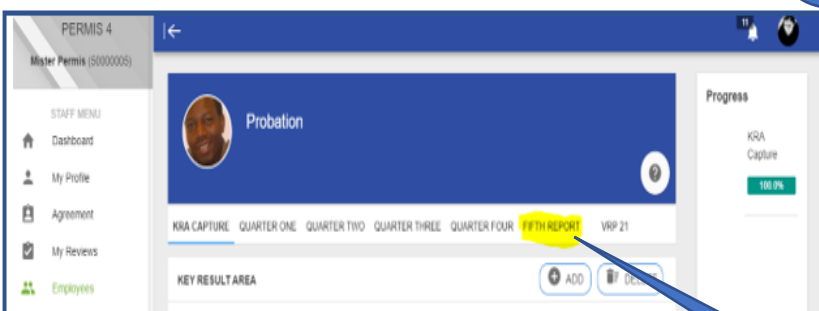
People Manager/Supervisor Selects either No (No for further Extension) or Yes (Yes for Probation to be Extended)



### Email Notification:



### Fifth Report Option



### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Four
5. Complete Section E (Comments)
6. Click Save Comments
7. Click **Yes** on Question "Is Probationary period to be extended..."
8. Click Save
9. Progress shows 100%
10. The email Notification goes to Employee/Probationer to complete Section E (Comments) and sign-off Q4 report
11. Fifth Report option is generated and indicated

**Note:** If **Yes** is Selected for Probation Period Extension, the process will move to the FIFTH REPORT process.

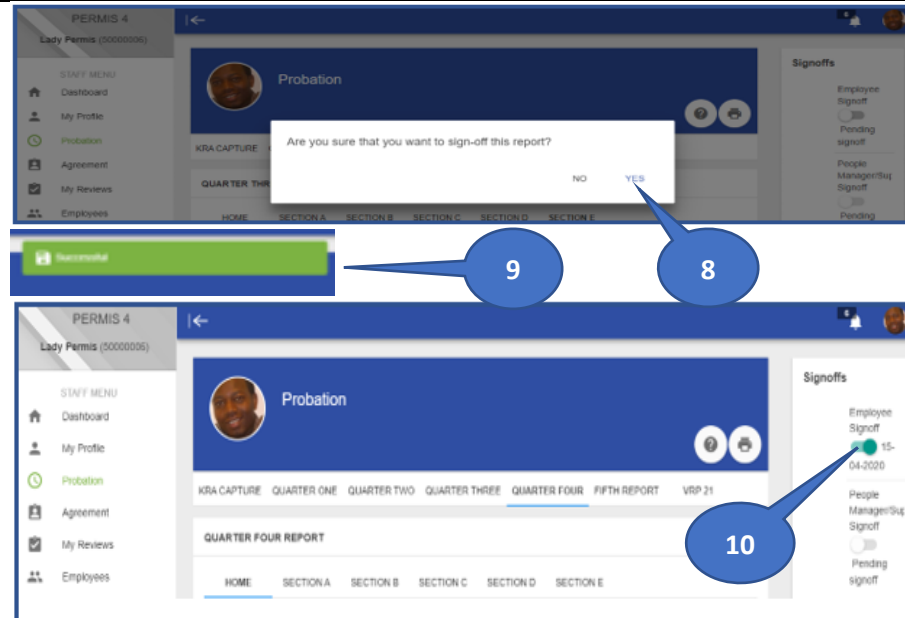
### Comments

#### Method for Completion of Quarterly Reports - CHECK

- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.
- Compulsory Fields Indicated as red asterisk (\*)

## 30. Quarter Four Report: Employee/Probationer completes Section E (Comments) and sign-off Quarter Four report

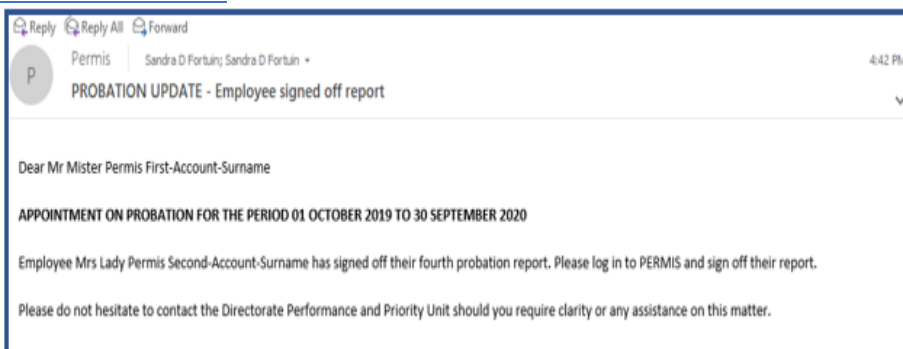
Employee/Probationer logs on to PERMIS and Completes Section E



### Steps

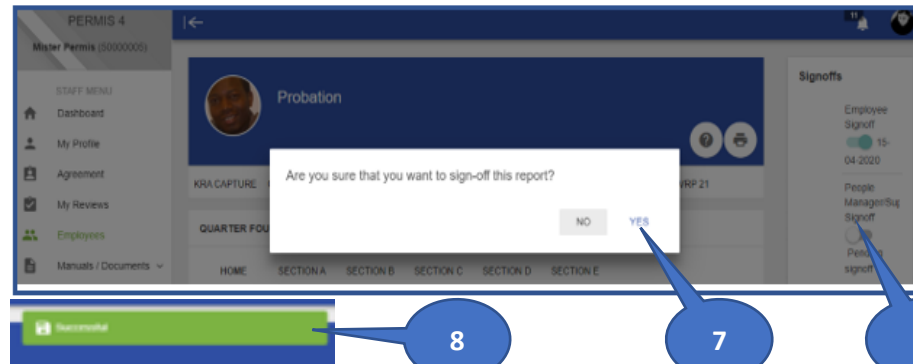
1. Employee/Probationer goes to the Probation Menu Option on the Landing Page
2. Click on Quarter Four
3. Click on Section E
4. Complete Employee/Probationer Section E (Comments)
5. Save Comments
6. Progress shows 100%
7. Click on Employee/Probationer sign-off
8. Click on Yes
9. Successful message appears
10. Report is signed-off
11. The email Notification goes to People Manager/Supervisor to sign-off the Report
12. If Yes (for Extension of Probation was selected) the process will move to the Fifth Report process after sign-off

### Email Notification:

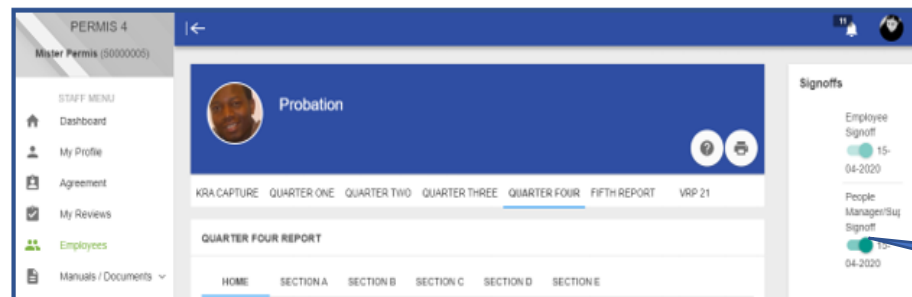
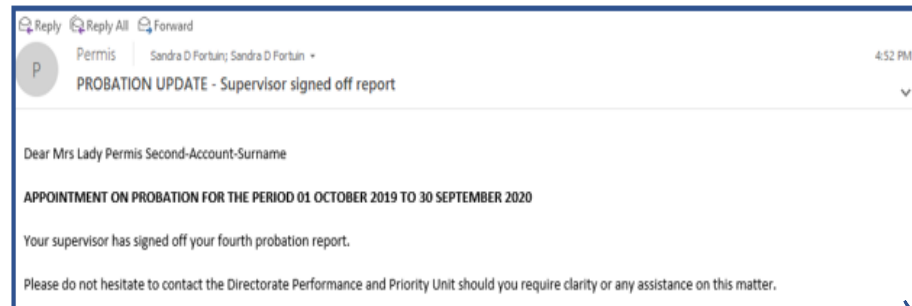


## 31. Quarter Four Report: People Manager/Supervisor signs-off Quarter Four report

People Manager/Supervisor logs on to PERMIS and Sign-off the Report



### Email Notification:



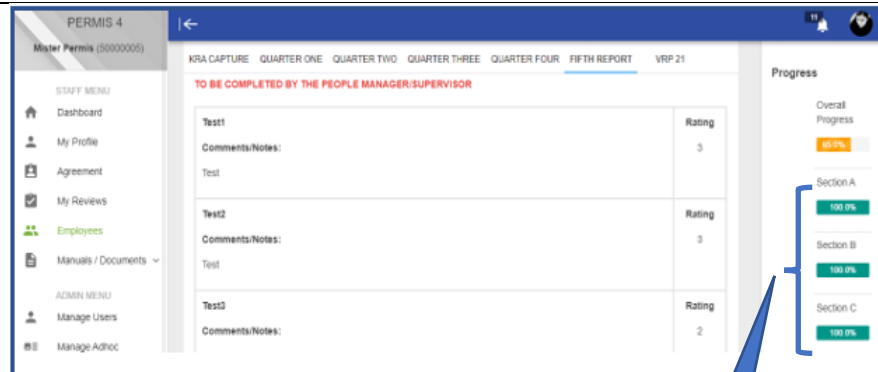
### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Quarter Four
5. Progress shows 100%
6. Click on People Manager/Supervisor sign-off
7. Click on Yes
8. Successful message appears
9. The email Notification goes to the Employee/Probationer to show that the People Manager/Supervisor signed-off the Q4 Report
10. Q4 Report is signed-off
11. PDF Report may be printed and signed

## Fifth Probation Report Steps

### 32. Fifth Report: People Manager/Supervisor Completes Fifth Report – Complete Section A-C

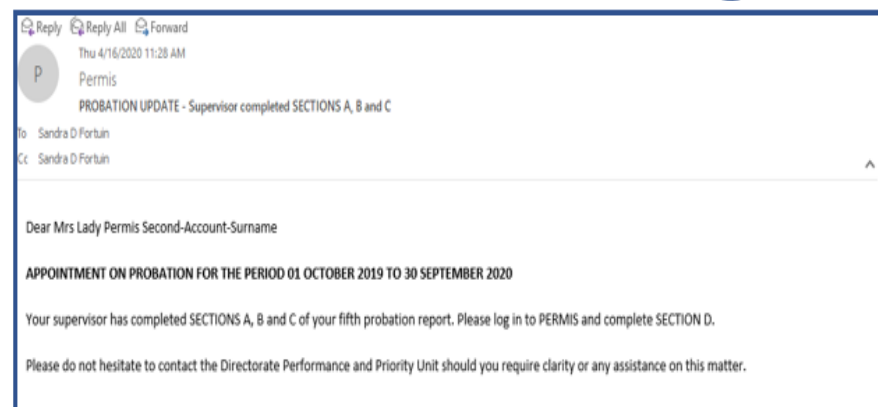
People Manager/Supervisor logs on to PERMIS and Complete Sections A - C



#### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Fifth Report
5. Complete fields in Section A, B and C
6. On Section C, Make selection Yes/No
7. Saved message appears
8. Fields on each Section must be completed until progress shows 100%
9. Once on 100 %, the email Notification goes to Employee/Probationer to complete Section D

#### Email Notification



#### Comments

***Sections A, B and C may be completed randomly as follows:***

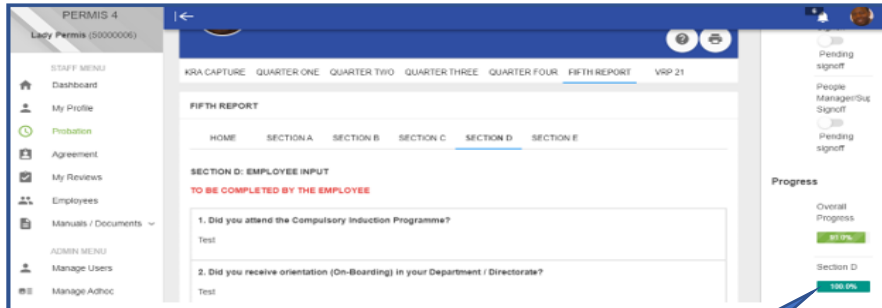
#### **Method for Completion of Quarterly Reports - CHECK**

- Section A: Rating is compulsory for all questions, but an answer to please elaborate is not.
- Section B- Both the rating and the comments are compulsory for all questions
- Section C- All questions will only be compulsory where areas of development were identified
- Compulsory Fields Indicated as red asterisk (\*)

## 33. Fifth Report: Employee/Probationer completes Section D

### Employee/Probationer logs on to PERMIS and Completes Section D

#### Section D on 100%



PERMIS 4  
Lady Permis (50000006)

STAFF MENU  
Dashboard  
My Profile  
Probation  
Agreement  
My Reviews  
Employees  
Manuals / Documents

ADMIN MENU  
Manage Users  
Manage Adhoc

KRA CAPTURE QUARTER ONE QUARTER TWO QUARTER THREE QUARTER FOUR FIFTH REPORT VSP 21

FIFTH REPORT  
HOME SECTION A SECTION B SECTION C SECTION D SECTION E

SECTION D: EMPLOYEE INPUT  
TO BE COMPLETED BY THE EMPLOYEE

1. Did you attend the Compulsory Induction Programme?  
Test

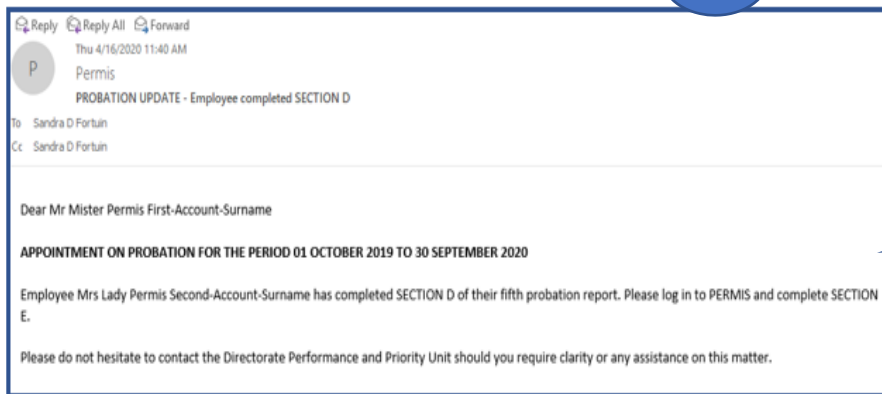
2. Did you receive orientation (On-Boarding) in your Department / Directorate?  
Test

Progress  
Overall Progress 91.9%  
Section D 100.0%

#### Steps

1. Employee/Probationer goes to Probation Menu option on the Landing Page
2. Select Fifth Report
3. Complete fields in Section D
4. Fields for this Section must be completed until progress shows 100%
5. Once on 100 %, the email Notification goes to People Manager/Supervisor to complete Section E (comments)

#### Email Notification



Reply Reply All Forward  
Thu 4/16/2020 11:40 AM  
P Permis  
PROBATION UPDATE - Employee completed SECTION D

To: Sandra D Fortun  
Cc: Sandra D Fortun

Dear Mr Mister Permis First-Account-Surname

APPOINTMENT ON PROBATION FOR THE PERIOD 01 OCTOBER 2019 TO 30 SEPTEMBER 2020

Employee Mrs Lady Permis Second-Account-Surname has completed SECTION D of their fifth probation report. Please log in to PERMIS and complete SECTION E.

Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.

#### Comments

#### Method for Completion of Quarterly Reports - CHECK

- Section D- All questions are compulsory
- Compulsory Fields Indicated as red asterisk (\*)

## 34. Fifth Report: People Manager/Supervisor completes Section E (Comments) – Select Extension is **No**

People Manager/Supervisor logs on to PERMIS and Completes Section E.

People Manager/Supervisor Selects either No (No for further Extension) or Yes (Yes for Probation to be Extended)

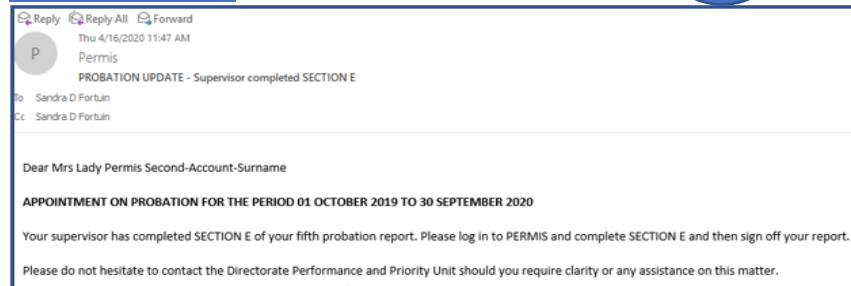


### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Fifth Report
5. Complete Section E (Comments)
6. Click Save Comments
7. Click **No** on Question "Is Probationary period to be extended..."
8. Click Save
9. Progress shows 100%
10. The email Notification goes to the Employee/Probationer to complete Section E (Comments) and sign-off 5th report

**Note:** If **No** is Selected for Probation Period Extension, the process will move to the VRP21 process.

### Email Notification:



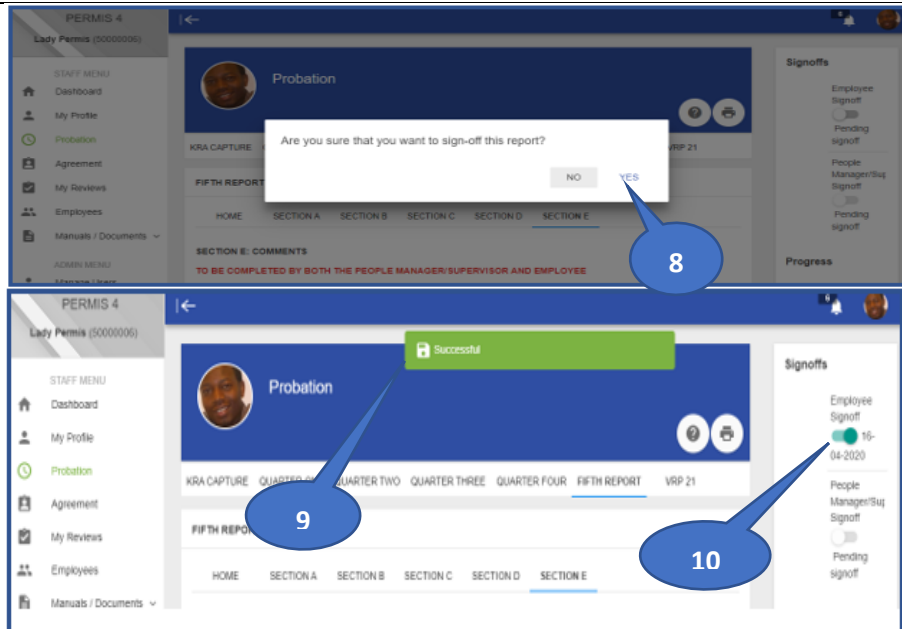
### Comments

#### Method for Completion of Quarterly Reports - CHECK

- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.
- Compulsory Fields Indicated as red asterisk (\*)

## 35. Fifth Report: Employee/Probationer completes Section E (Comments) and sign-off Quarter Five report

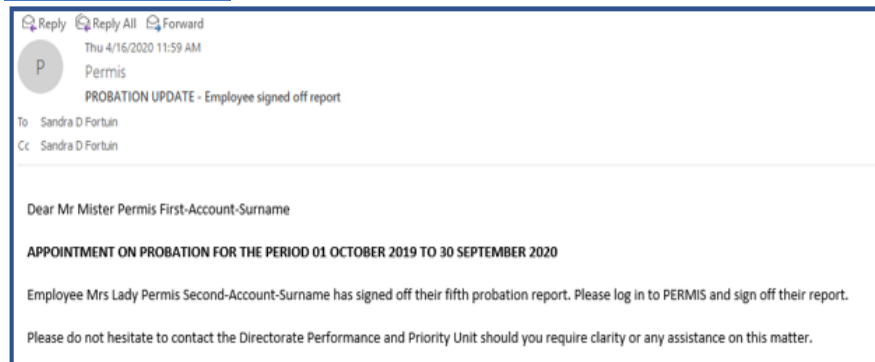
Employee/Probationer logs on to PERMIS, Completes Section E and Signs-off the report



### Steps

1. Employee/Probationer goes to the Probation Menu Option on the Landing Page
2. Click on Fifth Report
3. Click on Section E
4. Complete Employee/Probationer Section E (Comments)
5. Save Comments
6. Progress shows 100%
7. Click on Employee/Probationer sign-off
8. Click on Yes
9. Successful message appears
10. Report shows Signed-off
11. Email Notification goes to People Manager/Supervisor to sign-off

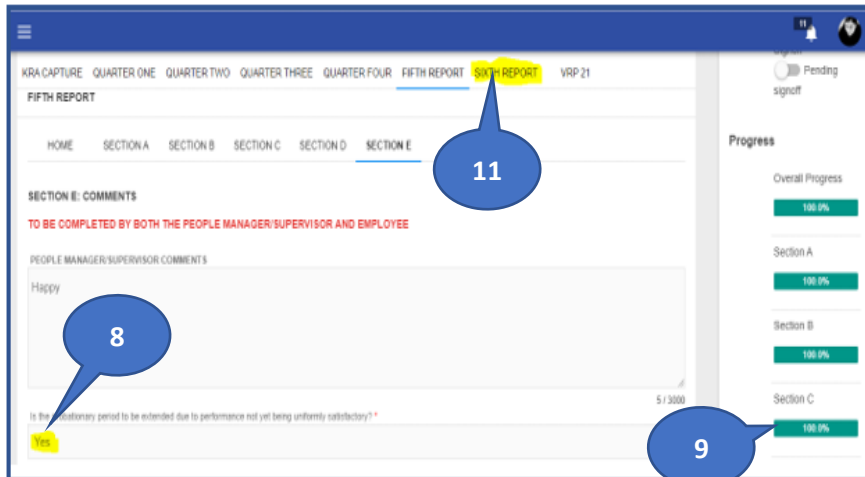
### Email Notification:



## 36. Fifth Report: People Manager/Supervisor completes Section E (Comments) – Select Extension is **Yes**

People Manager/Supervisor logs on to PERMIS and Completes Section E.

People Manager/Supervisor Selects either No (No for further Extension) or Yes (Yes for Probation to be Extended)

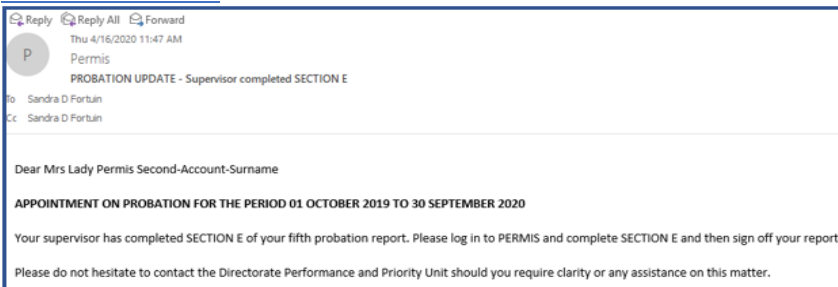


### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Fifth Report
5. Complete Section E (Comments)
6. Click Save Comments
7. Click **Yes** on Question "Is Probationary period to be extended..."
8. Click Save
9. Progress shows 100%
10. The email Notification will go to the Employee/Probationer to complete Section E (Comments) and sign-off 5<sup>th</sup> Report
11. Sixth Report option is generated and indicated

**Note:** If **Yes** is Selected for Probation Period Extension, the process will move to the SIXTH REPORT process.

### Email Notification



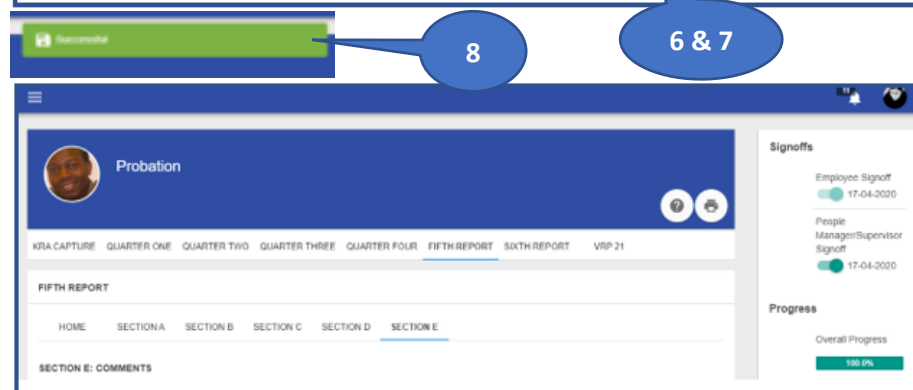
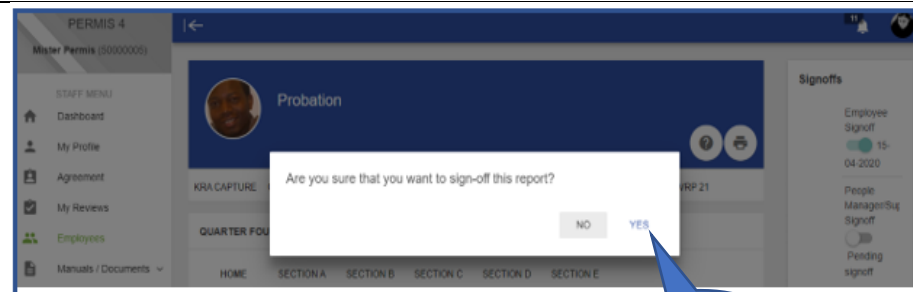
### Comments

#### Method for Completion of Quarterly Reports - CHECK

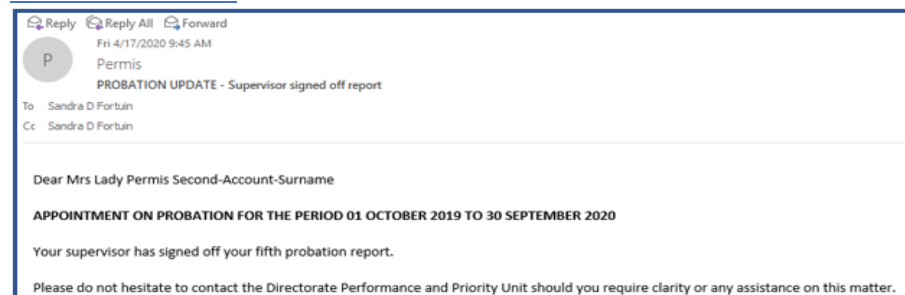
- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.
- **Compulsory Fields Indicated as red asterisk (\*)**

## 37. Fifth Report: People Manager/Supervisor signs-off Quarter Five Report

People Manager/Supervisor logs on to PERMIS and signs-off the Report



### Email Notification:



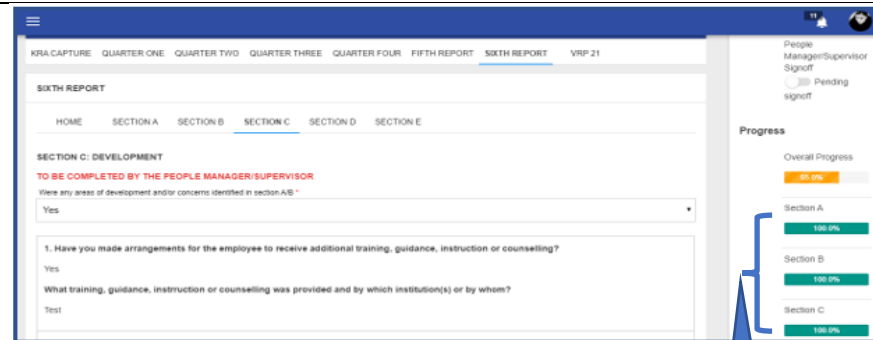
### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Fifth Report
5. Progress shows 100%
6. Click on People Manager/Supervisor sign-off
7. Click on Yes
8. Successful message appears
9. The email Notification goes to Employee/Probationer to show that the People Manager/Supervisor signed-off the Report
10. PDF Report may be printed and signed

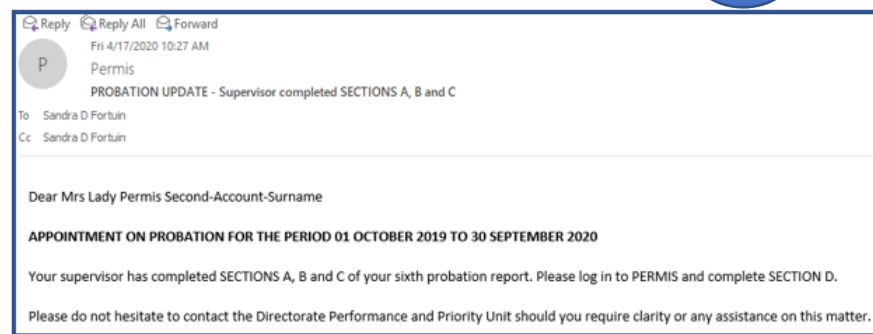
## Sixth Probation Report Steps

### 38. Sixth Report: People Manager/Supervisor Completes Sixth Report – Complete Section A-C

## People Manager/Supervisor logs on to PERMIS and Completes Sections A - C



### Email Notification



### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Sixth Report
5. Complete fields in Section A, B and C
6. On Section C, Make selection Yes/No
7. Saved message appears
8. Fields on each Section must be completed until progress shows 100%
9. Once on 100 %, the email Notification goes to Employee/Probationer to complete Section D

### Comments

***Sections A, B and C may be completed randomly as follows:***

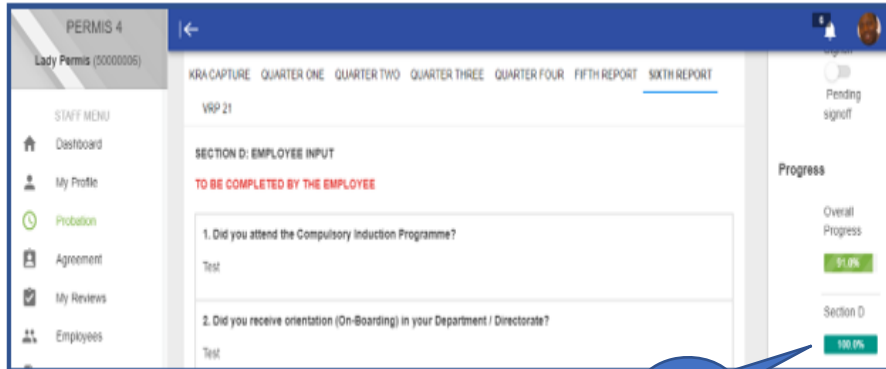
#### **Method for Completion of Quarterly Reports - CHECK**

- Section A: Rating is compulsory for all questions, but an answer to please elaborate is not.
- Section B- Both the rating and the comments are compulsory for all questions
- Section C- All questions will only be compulsory where areas of development were identified
- Compulsory Fields Indicated as red asterisk (\*)

## 39. Sixth Report: Employee/Probationer completes Section D

### Employee/Probationer logs on to PERMIS and Completes Section D

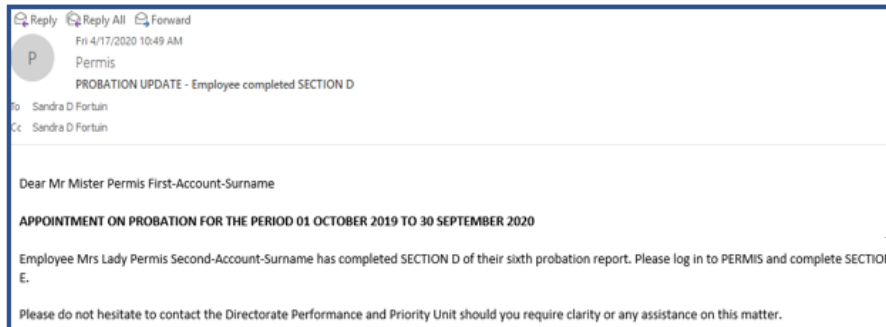
#### Section D on 100%



#### Steps

1. Employee/Probationer goes to Probation Menu option on the Landing Page
2. Select Sixth Report
3. Complete fields in Section D
4. Fields for this Section must be completed until progress shows 100%
5. Once on 100 %, the email Notification goes to People Manager/Supervisor to complete Section E (comments)

#### Email Notification



#### Comments

#### Method for Completion of Quarterly Reports - CHECK

- Section D- All questions are compulsory
- Compulsory Fields Indicated as red asterisk (\*)

## 40. Sixth Report: People Manager/Supervisor completes Section E (Comments) – Select Extension to Poor Performance is **No**

People Manager/Supervisor logs on to PERMIS and Completes Section E.  
People Manager/Supervisor Selects No (No for further Extension))

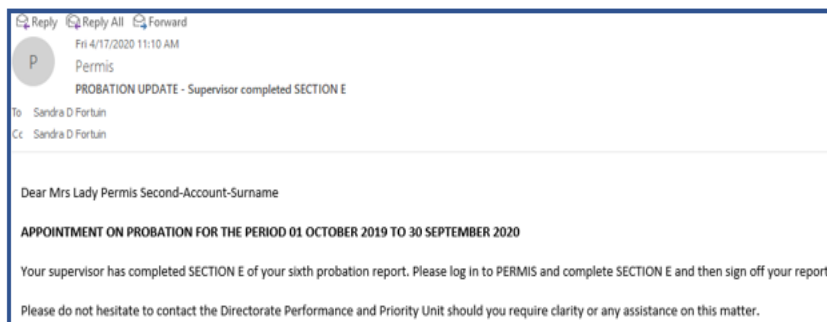


### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Sixth Report
5. Click on Section E
6. Complete Section E (Comments)
7. Click Save Comments
8. Click **No** on Question "Is the Employee to be referred to poor performance due to performance not being uniformly satisfactory"
9. Click Save
10. Progress shows 100%
11. The Notification goes to the Employee/Probationer to complete Section E (Comments) and sign-off 6<sup>th</sup> Report

**If Probation is Satisfactory, the VRP21 Process (see Point 45) will follow from here once this Report is signed off by both Employee and Supervisor – See Points 43 & 44 below**

### Email Notification



### Comments

#### Method for Completion f Quarterly Reports - CHECK

- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.

11

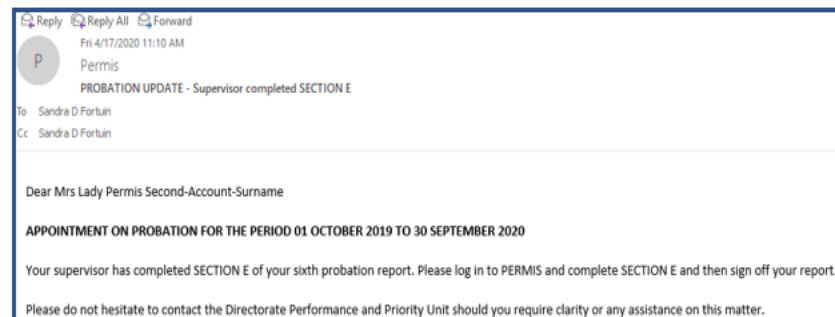
## 41. Sixth Report: People Manager/Supervisor completes Section E (Comments) – Select Extension to Poor Performance is **Yes**

People Manager/Supervisor logs on to PERMIS and Completes Section E.

People Manager/Supervisor Selects Yes (Yes for Probation to be Extended)



### Email Notification



### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
  2. Click on PROBATIONERS tab
  3. Select Employee/Probationer
  4. Click on Sixth Report
  5. Click on Section E
  6. Complete Section E (Comments)
  7. Click Save Comments
  8. Click **Yes** on Question ““Is the Employee to be referred to poor performance due to performance not being uniformly satisfactory””
  9. Click Save
  10. Progress shows 100%
  11. Notification goes to Employee/Probationer to complete Section E (Comments) and sign-off 6<sup>th</sup> Report
- **If Probation is Unsatisfactory, process will move to Poor Performance. Process described in the Poor Performance Module.**
  - **Points 43 and 44 below are still applicable.**

### Comments

#### Method for Completion of Quarterly Reports - CHECK

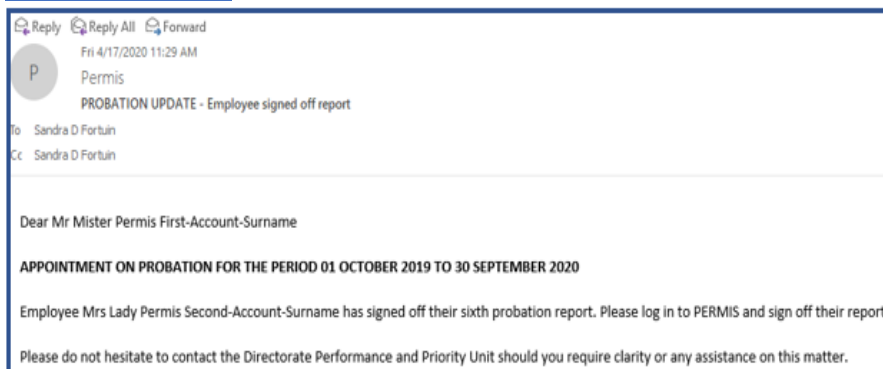
- Section E-Both the People Manager/Supervisor and Employee/Probationer comments are compulsory.

## 42. Sixth Report: Employee/Probationer completes Section E (Comments) and sign-off Sixth report

Employee/Probationer logs on to PERMIS, Completes Section E and signs-off the report



### Email Notification:

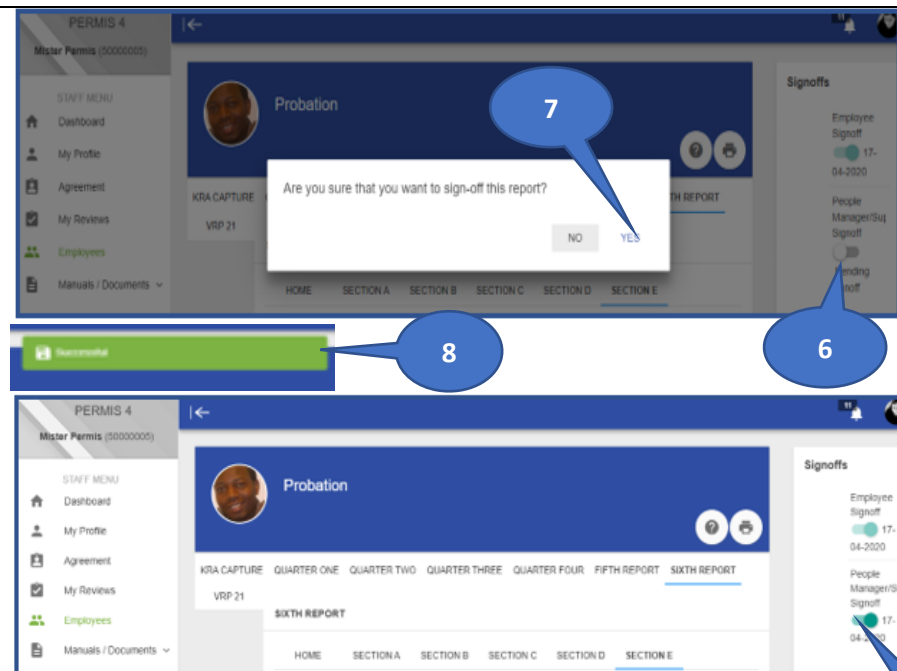


### Steps

1. Employee/Probationer goes to the Probation Menu Option on the Landing Page
2. Click on Sixth Report
3. Click on Section E
4. Complete Employee/Probationer Section E (Comments)
5. Save Comments
6. Progress shows 100%
7. Click on Employee/Probationer sign-off
8. Click on Yes
9. Successful message appears
10. Report is signed-off
11. Email Notification goes to People Manager/Supervisor to sign-off

## 43. Sixth Report: People Manager/Supervisor signs-off Sixth Report

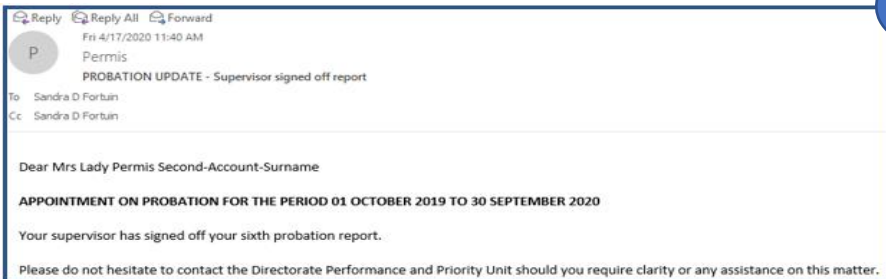
People Manager/Supervisor logs on to PERMIS and signs-off the Report



### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Select Employee/Probationer
4. Select Sixth Report
5. Progress shows 100%
6. Click on People Manager/Supervisor sign-off
7. Click on Yes
8. Successful message appears
9. People Manager/Supervisor signed-off
10. The email Notification goes to the Employee/Probationer to show the People Manager/Supervisor signed-off the Report
11. PDF report may be printed and signed

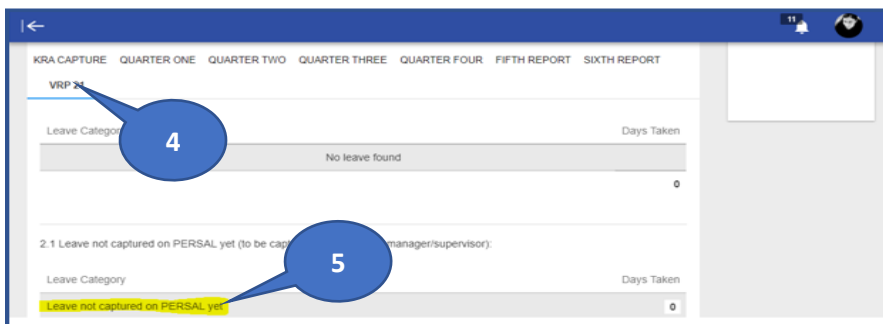
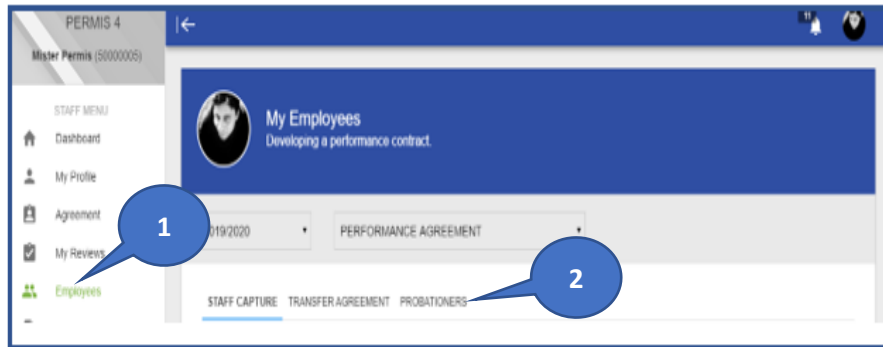
### Email Notification:



## VRP 21 Steps

### 44. VRP 21: People Manager/Supervisor updates and uploads proof of leave

- People Manager/Supervisor logs on to PERMIS and updates Leave and uploads evidence.
- Process kicks-off One month after sign-off of either Fourth Quarterly, Fifth or Sixth Reports in the case of No Probation extension



#### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Click on Search & Select the Employee/Probationer
4. Click on VRP21
5. Click on Leave not captured on PERSAL yet
6. Enter Number of Days Taken
7. Click Save
8. Additional Leave updated message displayed
9. Click on Upload proof
10. A box will appear to upload leave documents
11. Click on Choose file
12. Fetch the file from saved location
13. Click on Upload
14. Uploaded file name appears
15. Enter File/leave Description
16. Click on Upload
17. File uploaded successfully message appears
18. Uploaded file shown
19. This file may be downloaded as PDF

**NB. If Leave days are greater than zero, proof there-of must be uploaded.**

**If leave is zero, the Supervisor/People Manager will go straight to Point 45 below – No Uploading of evidence required.**

PERMIS 4

Permis (50000005)

KRA CAPTURE QUARTER ONE QUARTER TWO **Additional leave was successfully updated** REPORT

VRP 21

Leave Category

No leave found

2.1 Leave not captured on PERSAL yet (to be captured by the people manager/supervisor)

Leave Category

Days Taken

Leave not captured on PERSAL yet

25

25

**UPLOAD PROOF**

←

KRA CAPTURE QUARTER ONE QUARTER TWO QUARTER THREE QUARTER FOUR FIFTH REPORT SIXTH REPORT

VRP 21

Leave Category

Upload Proof File

File Description \*

Choose File No file chosen

CLOSE UPLOAD

Upload Proof File

File Description \*

Leave

Choose File Validations\_VRP21.docx

CLOSE UPLOAD

←

KRA CAPTURE QUARTER ONE QUARTER TWO **File Uploaded Successfully** REPORT

VRP 21

Leave Category

Days Taken

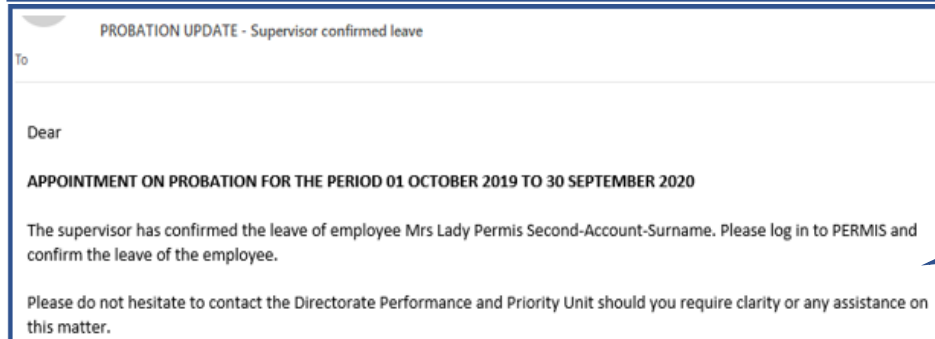
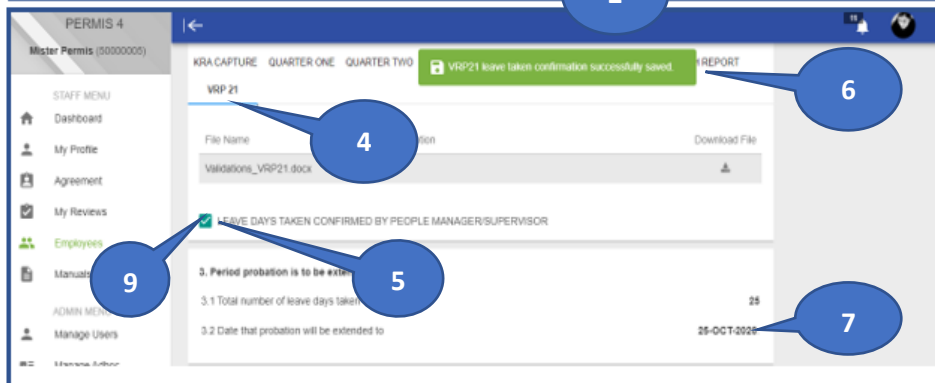
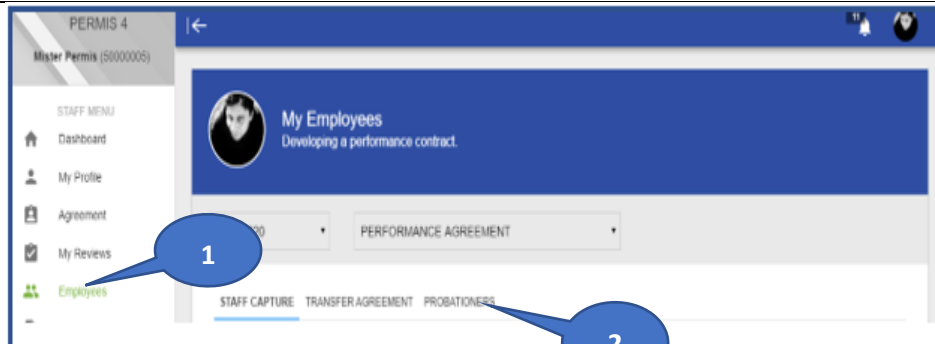
No leave found

2.1.1 Proof Uploaded:

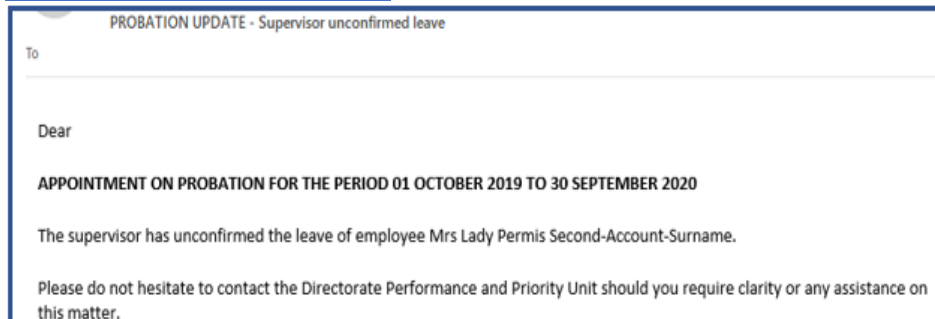
| File Name              | File Description | Download File                                                                       |
|------------------------|------------------|-------------------------------------------------------------------------------------|
| Validations_VRP21.docx | Leave            |  |

## 45. VRP 21: People Manager/Supervisor Confirms Leave

People Manager/Supervisor logs on to PERMIS and confirms leave



### Unconfirmed email Notification



### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Click on Search & Select the Employee/Probationer
4. Click on VRP21
5. Tick box - Leave days taken confirmed by People Manager/Supervisor
6. VRP21 leave updated successfully message displayed
7. Extended Probation date is indicated
8. Email Notification will go to PPU Admin to confirm leave
9. Supervisor/People Manager may unconfirm leave by un-ticking the Leave days taken by Supervisor/People Manager box
10. An unconfirmed email message will be sent

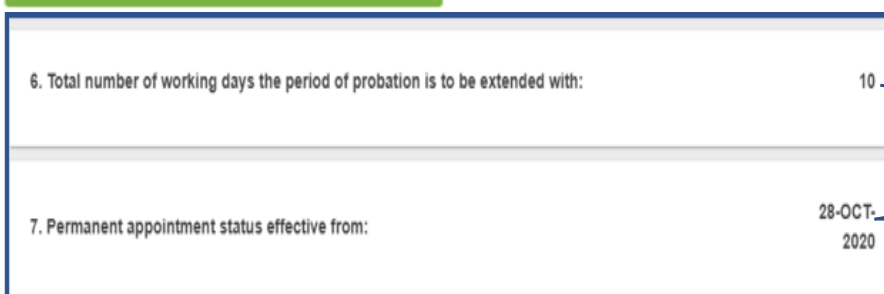
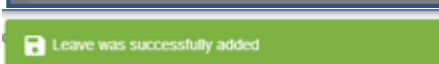
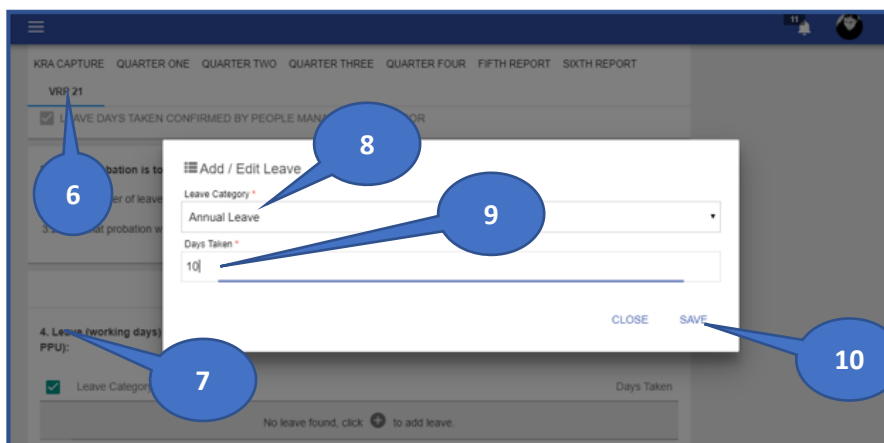
## 46. VRP 21: PPU ADMIN Adds Additional leave

PPU ADMIN logs on to PERMIS and adds additional leave if applicable.



### Steps

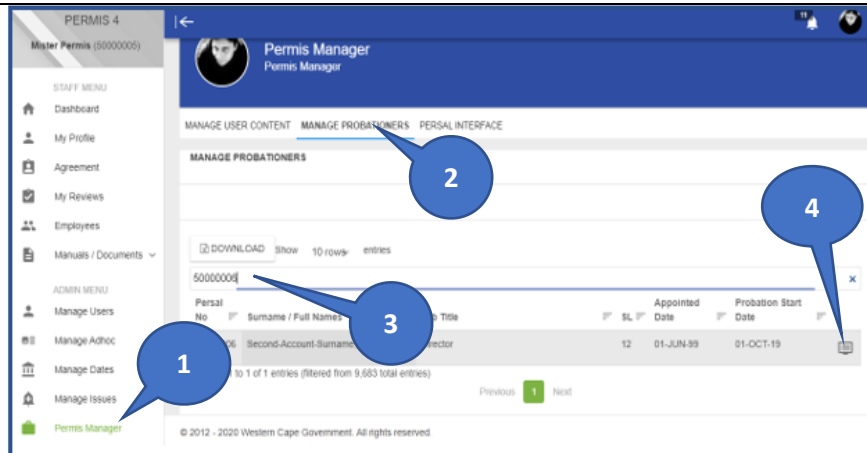
1. PPU ADMIN goes to PERMIS Manager menu option on the Landing page
2. Go to the MANAGE PROBATIONERS tab
3. Enter PERSAL Number or Surname in the Search Field
4. Click on the icon at the right of the probation record – "View Profile"
5. That will take you to the person's profile
6. Click on VRP 21
7. Click on Leave added by PPU ADMIN – Point 4
8. Choose the Leave option
9. Add the number of days
10. Click on Save
11. Number of days are indicated – Point 6
12. The Permanent appointment date is extended and indicated – Point 7
13. PPU must confirm leave – see Point 48 below



**If leave is zero, the PPU Administrator will go to Point 47 below – No uploading of evidence required**

## 47. VRP 21: PPU ADMIN confirms VRP21

### PPU ADMIN logs on to PERMIS and Confirms VRP21



PERMIS 4

Mister Permis (50000000)

STAFF MENU

- Dashboard
- My Profile
- Agreement
- My Reviews
- Employees
- Manuals / Documents

ADMIN MENU

- Manage Users
- Manage Adhoc
- Manage Dates
- Manage Issues
- Permis Manager

Perm Manager

MANAGE USER CONTENT | MANAGE PROBATIONERS | PERSAL INTERFACE

MANAGE PROBATIONERS

1 2 3 4

50000000

| Persal No | Surname / Full Names   | Title    | SL | Appointed Date | Probation Start Date |
|-----------|------------------------|----------|----|----------------|----------------------|
| 50000000  | Second-Account-Surname | Director | 12 | 01-JUN-99      | 01-OCT-19            |

10 of 1 entries (filtered from 9,683 total entries)

Previous 1 Next

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#### Steps

1. PPU ADMIN goes to PERMIS Manager menu option on the Landing page
2. Go to the Manage Probationers tab
3. Enter PERSAL Number or Surname in the Search Field
4. Click on the icon at the right of the probation record – “View Profile”
5. That will take you to the person's profile
6. Go to VRP 21
7. Click button “VRP21 Confirmed by PPU ADMIN
8. The email Notification goes to People Manager/Supervisor to sign-off VRP 21

5. Delay (number of days) by the employee not signing his/her performance agreement on the due date as required in terms of Public Service Regulation 72 (1): 0

6. Total number of working days the period of probation is to be extended with: 10

7. Permanent appointment status effective from: 19-NOV-2019

☒ VRP21 CONFIRMED BY PPU 7

#### Email Notification

PROBATION UPDATE - PPU administrator confirmed leave

To: Sandra D Fortuin

Cc: Sandra D Fortuin

Dear Mr Mister Permis First-Account-Surname

**APPOINTMENT ON PROBATION FOR THE PERIOD 01 OCTOBER 2019 TO 28 OCTOBER 2020**

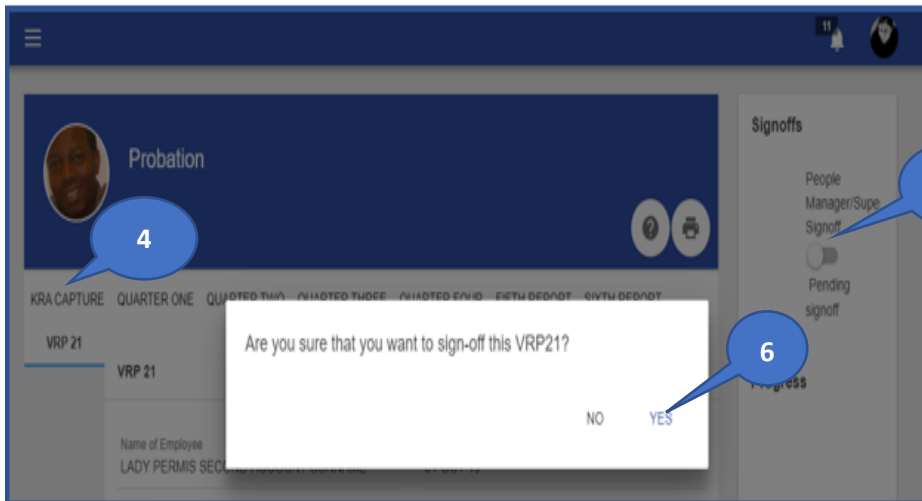
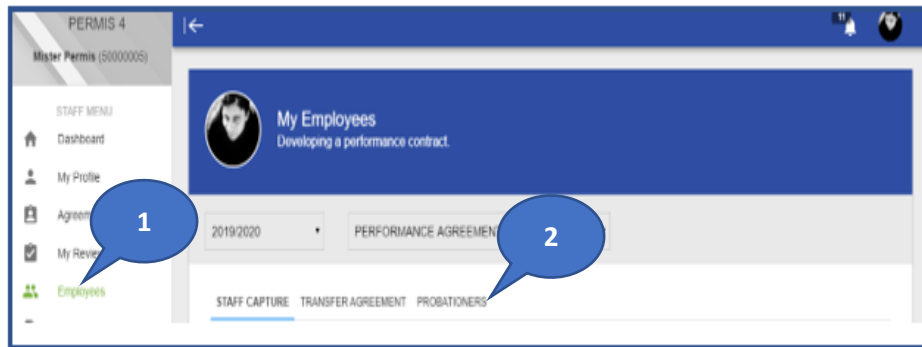
The PPU administrator has confirmed the leave of employee Mrs Lady Permis Second-Account-Surname. Please log in to PERMIS to sign off and print the VRP21.

Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.

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## 48. VRP 21: People Manager/Supervisor Signs-off VRP21

People Manager/Supervisor logs on to PERMIS and signs-off the VRP21



### Steps

1. People Manager/Supervisor goes to the Employee/Probationers Menu Option on the Landing Page
2. Click on PROBATIONERS tab
3. Click on Search & Select the Employee/Probationer
4. Click on VRP21
5. Click on People Manager/Supervisor sign-off
6. Click on Yes
7. VRP21 is signed off
8. The email Notification goes to the Employee/Probationer regarding successful Probation completion
9. Email Notification goes to PPU Admin
10. The VRP21 and Section 13 certificate may be printed and signed

## Email Notification to Employee/Probationer

Confirmation of Completion of Probation

To: Sandra D Fortuin  
Cc: Sandra D Fortuin

MRS LP SECOND-ACCOUNT-SURNAME  
DIRECTOR

Dear Mrs Lady Permis Second-Account-Surname

**DEPARTMENT OF THE PREMIER: CONFIRMATION OF COMPLETION OF PROBATIONARY PERIOD: 01 OCTOBER 2019 TO 30 SEPTEMBER 2020**

We wish to confirm that you have successfully completed your probationary period in the rank of DIRECTOR within Department of the Premier, in terms of the provisions of section 13(3) of the Public Service Act 1994, with effect from 28 October 2020.

Please note that your salary will be paid on the 15th of each month following the date of permanent appointment. All other terms and conditions of your appointment will remain the same.

Congratulations on the successful completion of your probationary period. We wish you well in your position.

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## Email Notification to PPU

PROBATION UPDATE - Supervisor signed off VRP21

To:

Dear

**APPOINTMENT ON PROBATION FOR THE PERIOD 01 OCTOBER 2019 TO 30 SEPTEMBER 2020**

The supervisor has signed off the VRP21 of employee Mrs Lady Permis Second-Account-Surname.

Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.

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Western Cape Government  
BETTER TOGETHER.

**VRP 21**

|                     |                                     |
|---------------------|-------------------------------------|
| Employee Name       | Lady Permis Second-Account-Surname  |
| Persal No           | 50000006                            |
| Supervisor Name     | Mister Permis First-Account-Surname |
| Department Name     | Department of the Premier           |
| Job Title           | Director                            |
| Appointment Date    | 01-OCT-2019                         |
| Probationary Period | 01-OCT-2019 TO 30-SEP-2020          |

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|                                                                                                                                                                      |             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| <b>1. The following have been finalised:</b>                                                                                                                         |             |
| 1.1 Performance Agreement                                                                                                                                            | Yes         |
| 1.2 Relevant Induction Programme                                                                                                                                     | Yes         |
| 1.3 At least Four (4) Quarterly Reports (subject to probation extension)                                                                                             | Yes         |
| <b>2. Leave (working days) taken during the 12-month probationary period:</b>                                                                                        |             |
| <b>2.1 Leave drawn from PERSAL</b>                                                                                                                                   |             |
| Leave Category                                                                                                                                                       | Days Taken  |
| <b>2.1 Leave not captured on PERSAL yet (to be captured by the people manager)</b>                                                                                   |             |
| Leave Category                                                                                                                                                       | Days taken  |
| Leave not captured on PERSAL yet                                                                                                                                     | 10          |
| <b>3. Period probation is to be extended by:</b>                                                                                                                     |             |
| 3.1 Total number of leave days taken                                                                                                                                 | 10          |
| 3.2 Date that probation will be extended to                                                                                                                          | 14-OCT-2020 |
| <b>4. Leave (working days) taken during the extension of probationary period or any extension thereof (to be completed by PPU):</b>                                  |             |
| Leave Category                                                                                                                                                       | Days Taken  |
| Family Responsibility Leave                                                                                                                                          | 10          |
| <b>5. Delay (number of days) by the employee not signing his/her performance agreement on the due date as required in terms on Public Service Regulation 72 (1):</b> |             |
|                                                                                                                                                                      | 0           |
| <b>6. Total number of working days the period of probation is to extended with:</b>                                                                                  |             |
|                                                                                                                                                                      | 10          |
| Page 2                                                                                                                                                               |             |

|                                                       |             |
|-------------------------------------------------------|-------------|
| <b>7. Permanent appointment status effective from</b> | 28-OCT-2020 |
|-------------------------------------------------------|-------------|

**CERTIFICATE IN TERMS OF SECTION 13 (3) OF THE PUBLIC SERVICE ACT  
ACT 103 OF 1994**

We hereby certify that **MRS LADY PERMIS SECOND-ACCOUNT-SURNAME** employed in the capacity of **Director** within the Department of the Premier has, during the probation period from 01-OCT-2019 to 30-SEP-2020, been diligent, that his/her conduct has been uniformly satisfactory, the he/she is in all respects suitable for the post which he/she holds and that his/her permanent appointment should be confirmed.

|                                                         |  |
|---------------------------------------------------------|--|
| <b>NAME AND SURNAME:</b><br>(People Manager/Supervisor) |  |
| <b>JOB TITLE:</b>                                       |  |
| <b>SIGNATURE:</b>                                       |  |
| <b>DATE:</b>                                            |  |

|                                            |  |
|--------------------------------------------|--|
| <b>NAME AND SURNAME:</b><br>(HOD/Delegate) |  |
| <b>JOB TITLE:</b>                          |  |
| <b>SIGNATURE:</b>                          |  |
| <b>DATE:</b>                               |  |

## Reminder e-mails

### 49. Reminder e-mails: Incomplete, Un-signed Quarterly report – 10 Working days Before End of -Quarter (Unsigned by Both Employee/Probationer and People Manager/Supervisor)

#### Schedule Job – 10 Days before End of Quarter email

Probation Report Reminder

To

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Dear Mr Mister Permis First-Account-Surname

**APPOINTMENT ON PROBATION FOR THE PERIOD 07 NOVEMBER 2019 TO 06 NOVEMBER 2020**

You are hereby reminded that the first probation report of MRS LADY PERMIS SECOND-ACCOUNT-SURNAME is due **10 days** from today.

Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.

#### Test Steps

- This report will automatically run 10 Working days **Before** the End of each Quarter
- The Report will be sent to the People Manager/Supervisor and PPU Admin

## 50. Reminder e-mails: Incomplete, Un-signed Quarterly report – 20 Working days After End of Quarter One (Unsigned by Both Employee/Probationer and People Manager/Supervisor)

### Schedule Job – 20 Days after End of Quarter email

Probation Report Overdue

To

Dear Mr Mister Permis First-Account-Surname

**APPOINTMENT ON PROBATION FOR THE PERIOD 07 OCTOBER 2019 TO 06 OCTOBER 2020**

You are hereby reminded that the first probation report of MRS LADY PERMIS SECOND-ACCOUNT-SURNAME is overdue by 20 days.

Please do not hesitate to contact the Directorate Performance and Priority Unit should you require clarity or any assistance on this matter.

#### Test Steps

- This report will automatically run 20 Working days **After** the End of each Quarter
- The Report will be sent to the People Manager/Supervisor and PPU Admin

## Probation Report (Outstanding/Unsigned) Quarterly Reports

### 51. Probation Report: iro Outstanding/Unsigned Quarterly reports

PPU Admin logs on to PERMIS and request the unsigned Probation Report

#### Test Steps

- This report may be requested by PPU ADMIN
- Go to Systems Reports and select Probationer Report



**Probationer Report**  
 View all probationers.

| LIST OF PROBATIONERS                                                                          |                                |                     |                               |                       |                     |                             |                     |                             |                     |                             |                     |                             |                     |                             |                     |                             |                        |
|-----------------------------------------------------------------------------------------------|--------------------------------|---------------------|-------------------------------|-----------------------|---------------------|-----------------------------|---------------------|-----------------------------|---------------------|-----------------------------|---------------------|-----------------------------|---------------------|-----------------------------|---------------------|-----------------------------|------------------------|
| <a href="#">DOWNLOAD</a> <a href="#">Show</a> <a href="#">10 rows</a> <a href="#">entries</a> |                                |                     |                               |                       |                     |                             |                     |                             |                     |                             |                     |                             |                     |                             |                     |                             |                        |
| Search:                                                                                       |                                |                     |                               |                       |                     |                             |                     |                             |                     |                             |                     |                             |                     |                             |                     |                             |                        |
| Employee<br>Persoal No                                                                        | Employee<br>Name               | Employee<br>Surname | Supervisor<br>Name            | Supervisor<br>Surname | Q1<br>Signed<br>Off | Q1<br>Signed<br>Off<br>Date | Q2<br>Signed<br>Off | Q2<br>Signed<br>Off<br>Date | Q3<br>Signed<br>Off | Q3<br>Signed<br>Off<br>Date | Q4<br>Signed<br>Off | Q4<br>Signed<br>Off<br>Date | Q5<br>Signed<br>Off | Q5<br>Signed<br>Off<br>Date | Q6<br>Signed<br>Off | Q6<br>Signed<br>Off<br>Date | VRP21<br>Signed<br>Off |
| 30000105                                                                                      | SECOND-<br>ACCOUNT-<br>SURNAME | LADY<br>PERMIS      | FIRST-<br>ACCOUNT-<br>SURNAME | MISTER<br>PERMIS      | Y                   | 25-APR-<br>20               | Y                   | 25-APR-<br>20               | Y                   | 25-APR-<br>20               | Y                   | 25-APR-<br>20               | Y                   | 25-APR-<br>20               | Y                   | 05-MAR-<br>20               | N                      |