

# Manage IPO for Academics

There is various tracking and recording activity to be carried out around the initial period of office (IPO) for academic appointments. This guide covers updating review details/dates. See **QRG: Running Reports (IP4)** for details of running reports, e.g., to assist with tracking IPO.

**What's Changed?**  
 1. p2 guidance on use of Review dates added.  
 (6/11/12)

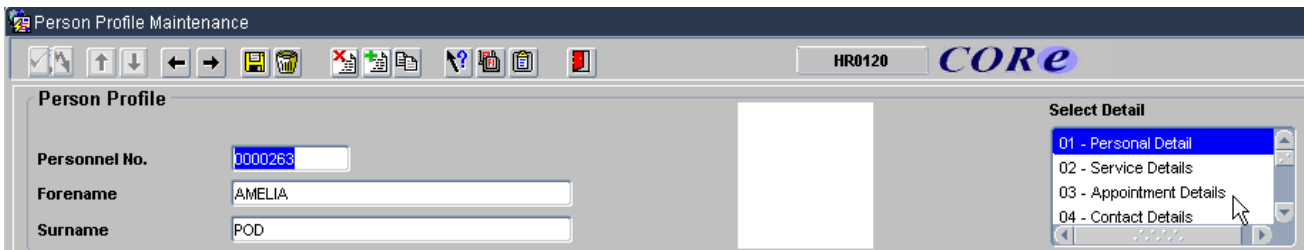
See **QRG: Managing Probation (IP2)** for non-academic appointments.

Navigate to: Personnel > Maintenance > Personal Profile

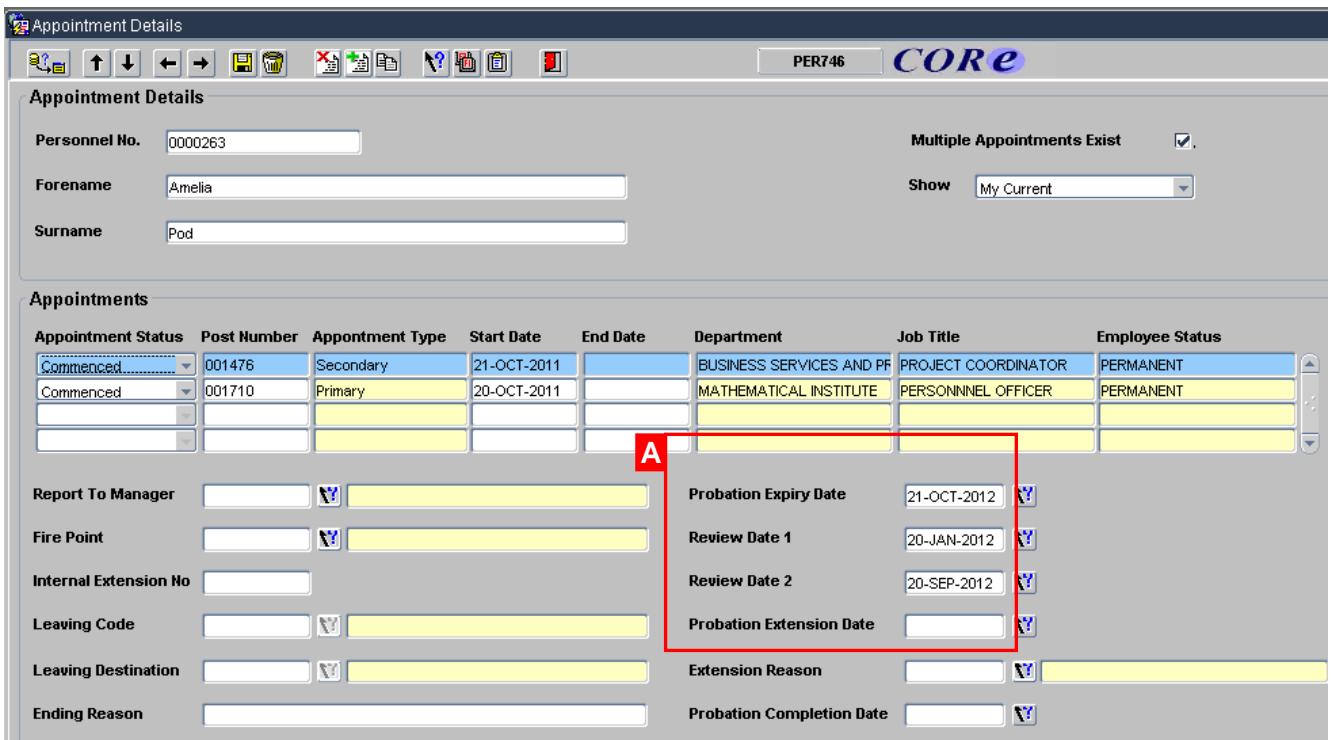
## Basic date information

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

1. Enter search criteria e.g. **Personnel No** or **Name** and click  and open the relevant employee record. The *Personal Profile Maintenance (HR0120)* window opens:



2. Go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens:



3. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted.

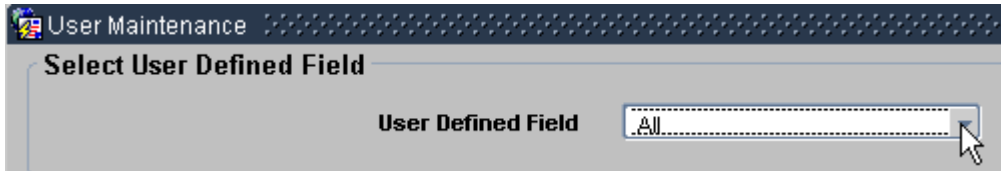
4. When changes to details occur, update **[A]** as required:

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.

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

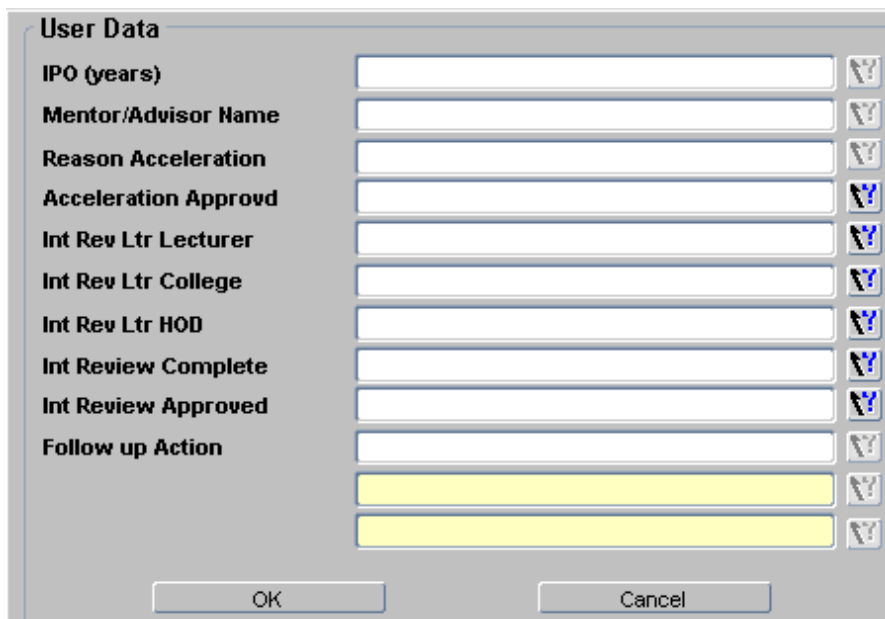
Additional IPO data

1. Click the **Appointment Details** button. The *Post Appointment Maintenance* (PER620) window
2. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.



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

**Part 1**



6. Complete details as required.

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

7. Click .

**Part 2**

The screenshot shows a 'User Data' dialog box with the following fields and controls:

- Formal Rev Ltr Lect**: Input field with a calendar icon.
- Formal Rev Ltr Coll**: Input field with a calendar icon.
- Formal Report Due**: Input field with a calendar icon.
- Formal Rept Received**: Input field with a calendar icon.
- Reappointment Letter**: Input field with a calendar icon.
- Other Outcome**: Input field with a calendar icon.
- 2nd Rev Ltr Lect**: Input field with a calendar icon.
- 2nd Rev Ltr Coll**: Input field with a calendar icon.
- 2nd Report Due**: Input field with a calendar icon.
- 2nd Report Received**: Input field with a calendar icon.
- Notes**: Input field with a calendar icon.
- Notes 2**: Input field with a calendar icon.

At the bottom of the dialog box are **OK** and **Cancel** buttons.

8. Complete details as required.

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

9. Click .



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

**Part 3**

10. Complete details as required.

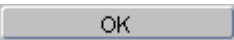

Field Name (* mandatory)	Description
HoD report	Date report requested.
Chair report	Date report requested.
TA report	Date report requested.
Ext. A report 1	Date report requested.
Ext. A report 2	Date report requested.
Ext. A report 3	Date report requested.
Senior Tutor report	Date report requested.
College 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.

11. Click .

**Part 4**

12. Complete details as required.

Field Name (* mandatory)	Description
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.

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