PROBATIONARY PERIOD AND TRIAL STATUS TOOLKIT

AUDIENCE:

- Classified and Unclassified Staff in permanent positions
- HR Managers/Liaisons

OVERVIEW OF PROBATIONARY PERIOD:

The probationary period is defined as the twelve month period during which an employee is evaluated as an initial hire into a permanent FTE position. This time period determines satisfactory performance and attainment of covered employee status.

The probationary period of twelve (12) months is utilized by the supervisor for observing the employee's abilities and performance of the duties and responsibilities assigned to the position.

For employees in a probationary status, personnel actions occurring in the first 12 months in the State system may impact the length of time spent in a probationary status: Demotion, Promotion, Reassignment, and Transfer.

When a probationary employee's performance is unsatisfactory, the employee may be terminated at any time before the end of the twelve (12) months period, without the right to appeal to the State Employee Grievance Committee. The supervisor must supply proper documentation to the Office of Human Resources before taking this action.

The probationary period may not be extended.
Once the employee has successfully completed the probationary period, personnel actions resulting in the employee entering a new classification may trigger a trial status for the purpose of obtaining permanent status in the new classification.

**OVERVIEW OF TRIAL STATUS:**

Trial status is defined as the six month period resulting from a promotion, transfer, reassignment, reclassification or demotion to any position in which the employee had not held permanent status.

A permanent employee who is in a trial period shall be given an appraisal prior to the completion of the six month trial period. If an employee does not receive an appraisal prior to the end of the six month trial period, and the trial period has not been extended, the employee shall receive a “successful” rating by default.

The trial period may be extended for a maximum of 90 calendar days based on a written notice documenting the extension to the employee. This written extension notice must be initiated prior to the end of the six month trial period. Upon written notification, the trial employee may be demoted to the same class or class of comparable grade from which promoted if the demotion occurs within the trial period. The trial employee may not grieve such demotion, since the employee has not successfully completed the trial period by receiving a “successful” appraisal rating.

Because a trial employee is a permanent employee, the procedures for substandard performance under the Employee Performance Management System policy must be followed in order to terminate or demote the trial employee to a lower graded class than that from which promoted for performance reasons. An "Official Warning Notice of Substandard Performance", is required to be given as part of this process. Departments should discuss such problems with a representative from Employee Relations in the Office of Human Resources as soon as it is evident that such a problem exists.
PROCESS STEPS:

HR Managers and supervisors who are responsible for probationary and trial status employees must be aware to the timeframes associated with each status.

Probationary Period Employees:

1. Within 6 weeks of a new employee’s date of hire, the supervisor should complete the planning stage document as covered in the Employee Performance Management System Policy.
2. The supervisor should closely monitor performance. Should the employee exhibit unsatisfactory performance, the supervisor should contact Employee Relations in the Office of Human Resource to discuss possible termination.
3. The probationary period review is due prior to the one year anniversary of employment. A short year review may then be required to place the employee on the universal review cycle.

Trial Status Employees:

1. Within 6 weeks of entering into trial status, the employee should be given their planning stage documentation as covered in the Employee Performance Management System Policy.
2. The supervisor should closely monitor performance during this time frame. Should the employee exhibit unsatisfactory performance, the supervisor should contact Employee Relations in the Office of Human Resource immediately.
3. The trial status review is due six months after the employee enters trial status. A short year review may then be required to place the employee on the universal review cycle.

RELEVANT POLICIES:

Employee Performance Management System (EPMS)

http://workgroups.clemson.edu/FIN5337_HR_POLY_PROC_MANUAL/view_document.php?id=119
Probationary Period and Trial Status

http://workgroups.clemson.edu/FIN5337_HR_POLY_PROC_MANUAL/view_document.php?id=85

Grievance Policy

http://workgroups.clemson.edu/FIN5337_HR_POLY_PROC_MANUAL/view_document.php?id=112

RELATED DOCUMENTS:

Employee Performance Management System Form

http://www.clemson.edu/employment/worklife/epms.html

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