

Introductory Period Review Guidelines

Purpose

The introductory period provides an opportunity for employees to demonstrate their ability and probability of successful performance. The supervisor or the employee may terminate this relationship with or without notice during the introductory period.

Introductory Period Review Recipients

Staff employees hired into regular positions must serve a (6) six-month introductory period and should have a review completed by the end date of the introductory period. *Failure to complete this process by the introductory period end date will result in the assumption that the employee's introductory period has been completed satisfactorily.* Refer to the [Introductory Period Date Chart](#) to verify the correct end date based on the effective date. The introductory period is served only once for each continuous period of employment except under the following circumstances:

- (1) If, during an employee's introductory period, the employee is promoted or transferred to another position, a new (6) six-month introductory period should begin with the effective date of the promotion or transfer;
- (2) If an employee changes from a temporary status to a regular status, a new introductory period begins with the effective date of appointment to the regular position;
- (3) If a non-exempt employee moves into an exempt position, a new introductory period must be served beginning with the effective date of appointment to the exempt position.

Introductory Period Guidelines

The supervisor should provide feedback throughout the introductory period, particularly if problems are observed that could result in the employment relationship ending prior to the completion of the introductory period. Open communication provides both the employee and the supervisor the opportunity to assess whether or not the working relationship should continue.

Employees in their introductory period are not subject to the Employee Counseling and Progressive Discipline policy. However, the supervisor should still:

- bring specific attendance, performance, or other concerns to the employee's attention in a timely manner;
- clarify performance expectations with the employee;
- allow the employee the opportunity to improve;
- document any communicated issues/concerns with the employee;
- provide the employee with written notification that ongoing issues/concerns may result in the employee not being retained should there not be immediate or sustained improvement.

The supervisor will consult with the assigned [HR Business Partner](#):

- if at any point during the introductory period it is anticipated that the employee may not be retained, or;
- in the event of any serious policy or behavior infractions.

The supervisor will consult with their [HR Business Partner](#) prior to making any decision to end the employment of an individual in their introductory period.

Introductory Period Review Guidelines

Introductory Period Review Process

NEW! Beginning March, 2022, all departments will use the [DocuSign Introductory Period Review Form](#) to review the employee's job performance prior to the end date of the introductory period. This process should provide the employee feedback on their performance, to include any areas in need of improvement. *Failure to complete this process by the introductory period end date will result in the assumption that the employee's introductory period has been completed satisfactorily.*

Extension of Introductory Period

In special circumstances, a one-time extension for up to 90 days may be granted *after consultation with your assigned HR Business Partner*.

Reasons for an extension may include:

- The employee has been away from work for a considerable amount of time (intermittently/continuously), or on leave for an extended period of time;
- The supervisor has been out of the office for a considerable amount of time;
- There has been a change in supervisors;
- The department has not been able to observe the employee perform a key function of the job (e.g., responsibility that may be cyclical or only occur xx times a year);
- There was a significant change in the employee's role and job responsibilities (e.g. the position description was rewritten, a reorganization, etc.)

Termination During the Introductory Period

If at any point during the introductory period there are concerns regarding the employee's likelihood of success in the role, immediately contact your assigned **HR Business Partner**.

Form Distribution

- Each individual in the DocuSign review process will receive an email with a PDF version of the completed review attached.
- Electronic and hard copies of introductory period reviews should always be stored in a secure manner.
- A copy of the introductory period review, and any related documents attached to the review, will automatically be placed in the employee's UA personnel file. Departments no longer need to send copies of reviews to Human Resources.

Introductory Period Review Resources

Visit the Performance Management section of the [Human Resources website](#) for access to the DocuSign form, instructions on using DocuSign Introductory Period Review form, and other helpful performance review resources contact your assigned **HR Business Partner** for any needed guidance on this process.