Probationary Period, 5.10
University Policy

Applies to: Classified civil service staff
(Staff who are members of a bargaining unit and are covered by a collective bargaining agreement are included in this policy. However, when this policy conflicts with specific terms in the applicable collective bargaining agreement, the language in the collective bargaining agreement will prevail.)

Responsible Office
Office of Human Resources

POLICY
Issued: 10/01/1973
Revised: 11/01/2022 (minor revision)

A probationary period is required for classified civil service and bargaining unit staff to review performance during the initial phase of employment or after certain changes in classification.

Purpose of the Policy
To outline the requirements for staff and departments when staff members are required to serve a probationary period.

Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certified status</td>
<td>A classified civil service status obtained for a specific classification upon satisfactory completion of the applicable probationary period or, when there is no probationary period, upon completion of 180 days in the specific classification with satisfactory performance.</td>
</tr>
<tr>
<td>Demotion</td>
<td>Placement of an employee in a classification which has decreased job responsibilities, scope, and impact, as evidenced by job title and/or pay range.</td>
</tr>
<tr>
<td>First position</td>
<td>An individual’s first classified civil service position with the university.</td>
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<tr>
<td>Full-time equivalency (FTE)</td>
<td>An employee’s assigned hours per work week divided by 40, and then multiplied by 100. For example, an employee assigned 30 hours per work week has a 75% FTE (30 divided by 40 equals .75, multiplied by 100 equals 75%).</td>
</tr>
<tr>
<td>Lateral job change</td>
<td>Placement of an employee in a job classification that has the same or similar job responsibilities, scope, and impact, as evidenced by job title and/or pay range.</td>
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<tr>
<td>Probationary period</td>
<td>A period of time that constitutes a trial or testing period for a classified employee, during which the employee may be terminated or returned to the former classification. It begins: 1. When a classified employee is hired into a first position; 2. When a classified employee receives a promotion; and 3. When a classified employee makes a lateral change from one classification to another.</td>
</tr>
<tr>
<td>Promotion</td>
<td>Placement of an employee in a job classification that has increased job responsibilities, scope, and impact, as evidenced by job title and/or pay range.</td>
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<tr>
<td>Reclassification</td>
<td>Occurs when, based on the results of a job evaluation, the job classification of an existing position is changed to a higher, lower, or lateral job classification.</td>
</tr>
<tr>
<td>Unit</td>
<td>College or administrative unit.</td>
</tr>
</tbody>
</table>

Policy Details

I. Serving Probationary Periods
   A. Probationary periods are served upon:
      1. First position;
      2. Promotion, except when a position is reclassified;
      3. Rehire after resignation or termination, except for reinstatement or re-employment within one year of separation of service to the former classification for which the individual is certified; and
      4. Lateral job change.
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B. Probationary periods are not served:
   1. When a reclassification of a position occurs.
   2. Upon reinstatement or re-employment within one year of separation of service to the former classification for which the individual is certified.
   3. Upon demotion.
   4. Upon reinstatement from disability separation to the same classification.

II. Conditions of Probationary Period
A. A demoted staff member does not serve a probationary period. However, civil service certified status must be obtained in the new classification before the staff member is eligible to apply for other university positions.
B. Time spent on paid time off or other leaves that exceed two weeks, unpaid leave or layoff is not calculated as part of the probationary period.

III. Performance Management, Demotion, and Termination
A. A manager in a unit must provide coaching and feedback to a staff member during their probationary period.
B. A manager in a unit must ensure a staff member receives a performance review during their probationary period unless they are terminated before their probationary period ends.
C. A staff member whose performance is unsatisfactory during a first position will be terminated.
D. A staff member whose performance is unsatisfactory following a promotion or lateral job change will be returned to their former classification.
E. The effective date of termination or demotion must be by the last day of their probationary period. Justification and supporting documentation, when applicable, must accompany the request for termination or demotion.
F. A staff member may be terminated or demoted only by direct action of the Office of Human Resources Employee and Labor Relations.
G. Terminations or demotions from a probationary period cannot be appealed to the State Personnel Board of Review.
H. A staff member who does not pass probation following a promotion or lateral job change will be returned to their former position or previous classification within the former unit. The employee will be retained by the current employing unit for up to 30 days at the former classification unless placement can be arranged sooner.
I. A staff member who does not pass probation following a promotion or lateral job change will not be returned to their former position or previous classification within their former unit while they are subject to corrective action in accordance with the Corrective Action and Involuntary Termination 8.15 policy due to serious misconduct.

PROCEDURE

Issued: 10/01/1973
Revised: 11/01/2022 (minor revision)

I. Length of Probationary Period
A. The Office of Human Resources Compensation (Compensation) determines length of probationary periods by classification not to exceed one year.
   1. The standard probationary period for non-bargaining civil service staff is 180 calendar days, regardless of the staff position full-time equivalency (FTE) or position type (e.g., regular, seasonal). The probationary period is completed at midnight of the 180th day.
   2. Classifications with probationary periods that exceed 180 calendar days can be found in Classifications with Extended Probationary Periods. The probationary period is completed at midnight of the last day of the period.
II. Removal or Demotion During a Probationary Period
   A. Notice of removal or demotion must be issued from Employee and Labor Relations or designee by the last day of the probationary period.
   B. The unit must submit a Probationary Removal/Demotion Request to Employee and Labor Relations, as soon as possible, but no later than two weeks prior to the end of the probationary period. The request must include a copy of the performance review and/or other relevant documentation.
   C. Employee and Labor Relations will review and approve probationary removal or demotion in accordance with the employee’s classification.
      1. Units must consult with Employee and Labor Relations regarding the placement of staff members who do not pass probation following a promotion or lateral job change.
      2. Units must consult with Compensation to ensure that the staff member is returned to the proper classification and rate of pay.
   D. Employee and Labor Relations will issue notice of removal or demotion and ensure the termination is initiated in Workday.
   E. Termination of an individual during their first position probationary period is effective on the date documented on the notification letter issued by Employee and Labor Relations.

Responsibilities

<table>
<thead>
<tr>
<th>Position or Office</th>
<th>Responsibilities</th>
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</thead>
<tbody>
<tr>
<td>Compensation</td>
<td>Determines length of probationary periods by classification not to exceed one year.</td>
</tr>
<tr>
<td>Employee and Labor Relations</td>
<td>1. Issue notice of removal or demotion as set forth in the policy</td>
</tr>
<tr>
<td></td>
<td>2. Review and approve Probationary Removal/Demotion Requests in accordance with the employee’s classification.</td>
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<td></td>
<td>3. Consult with units regarding placement of staff members who do not pass probation following a promotion or lateral job change.</td>
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<td></td>
<td>4. Ensure termination is initiated in Workday.</td>
</tr>
<tr>
<td>Manager in a unit</td>
<td>1. Provide coaching and feedback to a staff member during their probationary period.</td>
</tr>
<tr>
<td></td>
<td>2. Ensure a staff member receives a performance review during their probationary period as set forth in the policy.</td>
</tr>
<tr>
<td>Unit</td>
<td>1. Submit a Probationary Removal/Demotion Request to Employee and Labor Relations as set forth in the policy.</td>
</tr>
<tr>
<td></td>
<td>2. Consult with Employee and Labor Relations regarding placement of staff members who do not pass probation following promotion or lateral job change.</td>
</tr>
<tr>
<td></td>
<td>3. Consult with Compensation regarding proper classification and pay of staff members who do not pass probation following promotion or lateral job change.</td>
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</table>

Resources

Forms

Governance Documents
- Staff Compensation, Policy 3.10, hr.osu.edu/public/documents/policy/policy310.pdf
- University Rules for the Classified Civil Service, hr.osu.edu/policies-forms/rules-for-ccs

Additional Guidance
- Classifications with Extended Probationary Periods, hr.osu.edu/public/documents/policy/resources/extprobper.pdf
- Performance Improvement and Corrective Action, hr.osu.edu/services/elr/performance-improvement-corrective-action
Probationary Period, 5.10

University Policy

Applies to: Classified civil service staff

Contacts

<table>
<thead>
<tr>
<th>Subject</th>
<th>Office</th>
<th>Telephone</th>
<th>E-mail/URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy questions</td>
<td>HR Connection</td>
<td>614-247-myHR (6947)</td>
<td><a href="mailto:HRConnection@osu.edu">HRConnection@osu.edu</a></td>
</tr>
<tr>
<td>Additional compensation paid from sponsored research projects</td>
<td>Office of Sponsored Programs</td>
<td>614-292-3815</td>
<td>osp.osu.edu</td>
</tr>
</tbody>
</table>

History

Issued: 10/01/1973  Applies to university non-faculty staff
Revised: 10/01/1980
Revised: 07/01/1985
Revised: 03/1993
Revised: 07/25/1994  Changed to applies to classified civil service and bargaining unit employees
Edited: 10/31/1997  Changed to applies to classified civil service staff
Revised: 04/05/2000
Revised: 07/01/2001
Edited: 09/06/2002  Changed to applies to classified civil service and bargaining unit employees
 Revised: 04/01/2010
Revised: 12/01/2010
Revised: 06/01/2011
Edited: 04/14/2014
Edited: 01/22/2021  Added HR Connection contact information
Revised: 03/15/2021  Minor revision
Revised: 11/01/2022  Minor revision