



1. DETERMINE WHETHER TO INSTITUTE AN INTRODUCTORY PERIOD POLICY

- Determine whether an introductory period policy is advisable for the organization, particularly with respect to at-will employment concerns or in conjunction with labor relations issues.
 - Review state and local laws.
 - Review any applicable labor agreements, such as a collective bargaining agreement (CBA), to ensure compliance.
 - Confer with your FrankAdvice HR consultant and/or legal counsel.

2. INSTITUTE AN INTRODUCTORY PERIOD POLICY PRIOR TO HIRING

- Institute an introductory period policy prior to interviewing or hiring any introductory employees.
 - Include policy in the employee handbook.
 - Address the following concepts:
 - Length of the period (e.g., 90 days, six months);
 - Purpose of the policy (e.g., to evaluate the employment relationship);
 - Possible extensions of the period, if any;
 - At-will employment disclaimer; and
 - Benefits entitlements.

3. DETERMINE WHETHER AN EMPLOYEE IS SUBJECT TO THE INTRODUCTORY PERIOD POLICY

- Determine whether an employee is subject to the introductory period policy, either as a new hire, a transfer or a rehire.
- Follow the introductory period policy.



4. MANAGE EMPLOYEE DURING INTRODUCTORY PERIOD

- Provide the employee with all necessary information regarding rights and responsibilities during the introductory period, including benefits enrollment information.
- Provide guidance up front for what is expected of the employee, including the appraisal process that will be used.
- Encourage the employee to ask questions and request additional information.
- Provide frequent feedback to the introductory employee and adjust goals if necessary.
- Provide training, coaching or mentoring as needed.
- Manage performance or conduct concerns.
 - Clarify the problem (e.g., tardiness).
 - Identify the problem using specific examples (e.g., "You have arrived 15 minutes late for your shift the past two days.")
 - Allow the employee an opportunity to respond.
 - Suggest ways to correct the problem.
 - Establish interim goals to attain desired performance or avoid misconduct.
 - Consider extending the introductory period to allow interim goals to be met, if appropriate.

5. MAKE NECESSARY DETERMINATIONS AT CONCLUSION OF INTRODUCTORY PERIOD

- Determine whether to terminate or continue employment.
 - Consider whether to extend the introductory period.
 - Consider whether to offer a transfer to another position within the organization that may be a better fit if the employee's performance was poor.
 - Review any applicable labor agreements, such as a collective bargaining agreement (CBA), to ensure a termination decision complies with any pertinent requirements.
 - If terminating employment, ensure the decision is reviewed.
 - If terminating employment, adequately document the decision.
- Ensure consistency across the organization in employment decisions.