PROBATIONARY PERIOD POLICY

Introduction: How to Use This Template

A new hire's first months on the job can determine the success of the employment relationship. An effective policy governing probationary periods is important for managing expectations for both you and the new employee.

This document provides a structured approach to developing a probationary period policy and includes the following elements:

- Probationary employee rights and obligation
- Performance management procedures
- Extension procedures

Use this template to craft a policy for setting expectations and a process for the probationary period of a new hire that fits your needs

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<td>Policy Owner</td>
<td>Human Resources</td>
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<td>Policy Approver(s)</td>
<td>Vice President of Human Resources</td>
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<tr>
<td>Related Policies</td>
<td>Name other related enterprise policies both within or external to this policy.</td>
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<tr>
<td>Related Procedures</td>
<td>Name other related enterprise procedures both within or external to this policy.</td>
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**Purpose**

The goal of [organization name]’s hiring practices and policies are to select and retain the best people for their roles and the best fit for our organization. Ensuring that a newly hired employee is a good fit for [organization name] is a key component of our success. Part of our hiring process includes a probationary period during which time a newly hired employee’s performance is evaluated. To help determine if the employee is an appropriate fit all newly hired employees will complete an X-month [insert number, e.g. three or six months depending on Canadian jurisdiction] probationary period during which their employment will be evaluated and a decision will be made whether or not to continue their employment with [organization name].

**Scope**

This policy applies to all [full-time, part-time; insert other groups if necessary] employees at [organization name].

**Definitions**

**Probationary Period:** The initial period of employment at [organization name], typically lasting X months [three to six months], during which a new employee’s suitability for a role and fit with their team and the organization are assessed. During that period, both the employee and organization may terminate the employment relationship with X days (i.e. 5 days) notice or pay-in-lieu of notice during this period [Please consult your legal counsel and the relevant employment legislation to verify the requirements in your jurisdiction].
Probationary Employee: An employee completing their probationary period. An employee may be a probationary employee upon first hire or when moving to a new role within the organization.

Governing Legislation

List employment legislation applicable to your jurisdiction i.e. the Employment Standards Act.

Probation Terms

The terms of the probationary period will be clearly communicated to all new employees in their employment agreement, contract or offer letter. Typically, probationary periods at [organization name] will last X-months (three – six months). However, in certain circumstances, the probationary period may be extended.

Employees Rights and Obligations

Except as stipulated below, probationary employees have the same rights and obligations as other employees in comparable positions at [organization name].

Benefits

In accordance with existing agreements with benefit providers, [organization name] employees become eligible for medical, dental, optical [and specify other, if applicable] benefits upon the successful completion of their probationary period [or within X months of employment depending on the agreement with the benefits provider]. Expenses incurred during the probationary period cannot be claimed retroactively.

Vacation and Leaves

Typically, employees are not eligible to take vacations or other types of leave, including unpaid leave, during their probationary period with the exception of the
following (some jurisdictions may stipulate an employees right to leave based on criteria including length of employment; check and list relevant legislation in your jurisdiction).

Vacation entitlement for employees in their first year of employment will be calculated based on the length of time worked in that year following the completion of the probationary period. Leave entitlements will be calculated in accordance with the applicable policies. Please see the [list policies, e.g. Vacation Policy, Medical Leave Policy, etc.] for more details.

Probationary employees may be eligible to take vacation or a leave in certain circumstances, such as medical or family emergencies. Probationary employees wishing to take vacation or leave are required to request approval from [their immediate supervisor/Human Resources/specify job title]. Requests should be made as far in advance as necessary to accommodate scheduling and training changes. Requests will be reviewed on a case-by-case basis and in consideration of the following factors:

- Gravity of the reason for the leave or vacation
- Scheduling considerations
- Team or department workload
- The requesting employee's training schedule
- [Insert other reasons]

If the probationary employee's request is approved, the time taken off during the probationary period will be deducted from the vacation or relevant leave entitlement following the completion of the probationary period.
Termination of Employment

In accordance with [insert name of employment legislation in your jurisdiction], [organization name] can terminate an individual's employment during [the first X-months of employment/their probationary period – verify the employment legislation in your jurisdiction to ensure compliance] without notice or pay in lieu of notice [it is generally required in Canadian Provinces that notice or payment in lieu of notice is provided prior to termination; it is very important to clearly spell out your notice period in the employee agreement]. The probationary employee can end their employment at [organization name] without giving notice (there may be exceptions for some employees or roles and if so clearly state that in the employment agreement).

Performance Management

At the middle of the probationary period and then again at the end of the probationary period, each employee will have a review meeting with their immediate supervisor to assess their performance to-date and then set short-term goals as they begin regular employment with [organization name].

Additionally, supervisors are expected to hold frequent check-ins with probationary employees to provide feedback, address their questions, and set performance goals.

Supervisors will notify new employees of any work performance deficiencies during the probationary period in order to provide the employee with an opportunity to correct their performance.

Extensions

In certain circumstances, it may be advisable to extend an employee’s probationary period. Such circumstances include, but are not limited to, the following:

- Additional time to assess performance
- Extended training
• [Insert other reasons]

Requests for extensions of the probationary period may be made by the employee’s supervisor, head or the department [list others if applicable]. All requests for extensions of the probationary period should be made in writing to [specify decision maker, e.g. VP of Human Resources] no later than 30 days before the end of the original probationary period.

Human Resources will communicate the decision to extend the probationary period along with new terms of employment to the affected employee in writing no later than 20 days before the end of the original probationary period.

**Employee Declaration**

I, ____________________________, hereby acknowledge that I have read and understand the [organization name]’s Probationary Period Policy. I agree to abide by the terms and conditions of this policy and ensure that persons working under my supervision abide by the terms and conditions of this policy. I understand that if I violate or fail to comply with this policy, I may face legal or disciplinary action according to applicable laws or [organization name] policies.