A. Scope

This policy applies to all Service Staff employees at Bloomington, IUPUI, and South Bend.

B. Policy Statement

1. It is the policy of Indiana University that all Service Maintenance Staff employees who promote or transfer to another Service Maintenance Staff position will serve a trial period to provide assurance that the person can satisfactorily fulfill the demands of the position and before the promotion or transfer becomes final.
   a. At IUPUI, SM employees who transfer to a position with duties that are substantially the same as the former position do not serve a trial period.

2. The length of the trial period is 60 calendar days.

3. When it is felt that a promoted or transferred employee may not successfully complete the trial period, the Corrective Action policy provisions on documentation (such as a completed progress report) and on the opportunity to receive and present information and ask questions prior to a final determination are to be applied.

4. Promoted or transferred employees who are determined not to be successful and are removed from the position have access to all steps of the Problem-Grievance Resolution Procedure.

5. A promoted or transferred employee retains and continues to accrue university and unit seniority during the trial period.
6. Once an employee has satisfactorily completed the trial period, he or she may not be placed on another trial period again during a period of continuous Staff employment unless promoted or transferred. However, if the employee has a break in service, the employee must serve a New Employee Evaluation period again if rehired.

C. Procedures

1. At IUPUI, if, during the trial period, the employee is disqualified or voluntarily requests to return, the employee can return to his or her former unit and job classification if there is a vacant position which has not yet been offered to another person (provided qualifications are met). If a vacant position is not available, the following provisions will be applied:
   
a. A promoted or transferred employee who fails to meet the standards of the new job within the trial period may be given up to a two week notice of separation. The employee will be given preference for the next position open (provided qualifications are met) in the functional classification.
   
b. A promoted or transferred employee who voluntarily requests within the trial period not to continue in the new position will also be given preference for the next position (provided qualifications are met) open in the functional classification.
   
c. In both of these events, a request for reinstatement in the employee's former occupational unit will be given first preference when an opening occurs.
   
d. If reinstated in the previous occupational unit within one year of the date of promotion or transfer, the employee’s former seniority date in that unit will be reinstated.

2. At Bloomington and South Bend, if the employee is disqualified during the trial period, the employee can return to his or her former unit and job classification and regain unit seniority as of the effective date of the promotion or transfer. If the disqualification is appealed and upheld, the employee can return to his or her former unit and job classification and regain unit seniority as of the effective date of the promotion or transfer.
   
a. Service-Maintenance employees who transfer to or are promoted to a job in another occupational unit can return voluntarily to the former unit and job classification within the trial period and regain unit seniority as of the time of promotion or transfer.
   
b. SM employees promoted within their occupational unit can return voluntarily to their former job classification within the trial period.

3. If it is decided at any time during the trial period, not to continue the employee's employment, the campus Human Resource office is to be contacted to help determine if a basis for separation exists, whether the documentation and due process steps of the Corrective Action policy have been taken, whether more time should be provided, and whether other job opportunities exist that better suit the individual, before separation from employment occurs.
   
a. At the end of the trial period, supervision shall inform the employee as to whether the period has been satisfactorily completed.
D. Sanctions
Managers, supervisors, and employees who violate this policy are subject to corrective action, up to and including separation.

E. Web Address for this Policy
hr.iu.edu/policies/sm-all/employment/trial_period_promoted_transferred.html

F. Related Information
Corrective Action policy
Problem-Grievance Resolution policy
Evaluation Period for New Employees policy

G. History
In the Spring of 2012, Indiana University administration and AFSCME Council 62 leadership worked to merge the personnel policies covering Service (SM) Staff at Bloomington, IUPUI, and South Bend into one set of policies. This is one of the 27 policies that is the product of their work. Effective July 1, 2012, it brought together the provisions that were the same on all three campuses; eliminated differences when agreement could be reached; and identified those provisions in which differences remained.