Six-Month Probation Check-in for Leaders

The following instructions will walk you through how a Leader completes a Six-Month Probation Check-in for an employee.

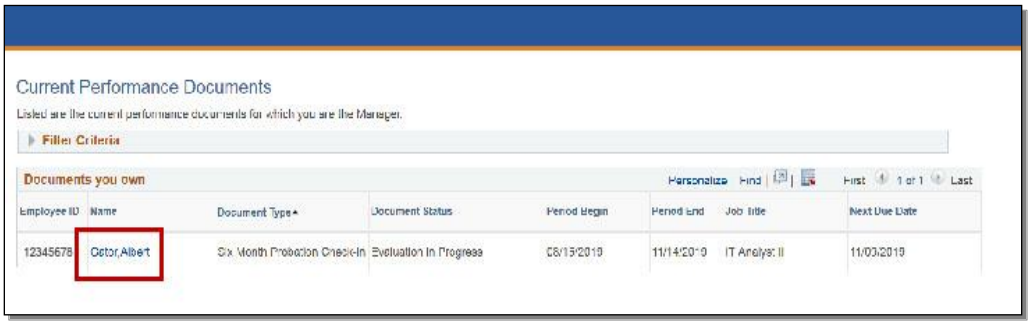
Navigation

Login into myUFL and navigate to:

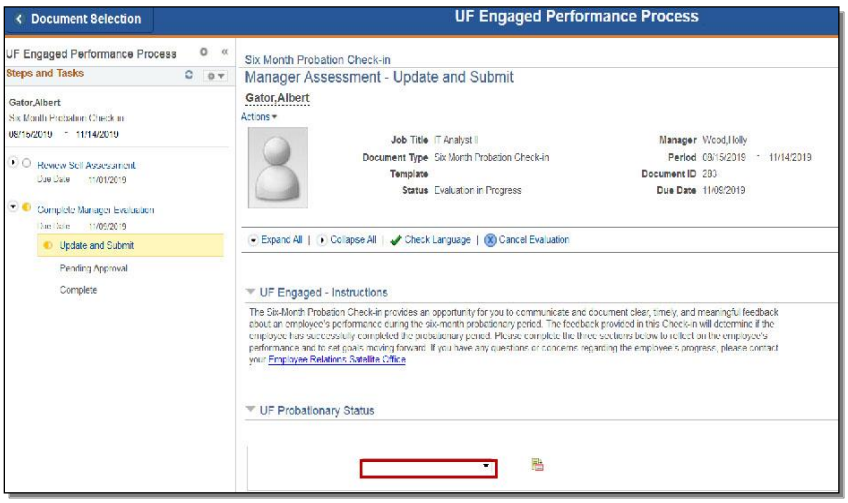
Nav Bar > Main Menu > Human Resources > Manager Self Service > UF Engaged > Performance Documents > Current Documents

1. To complete a Six Month Probation Check-in, click on the **employee's name**. If there is more than one row, make sure that you click on the row featuring the **Six Month Probation Check-in** Document Type.

   NOTE: The Due Date is five days earlier than the end of the Period. The five day period allows for Human Resources to review in the case of a request for an extension. If you do not complete the Probation Check-in by the date listed under **Next Due Date**, the employee will default to have successfully completed their probationary period.

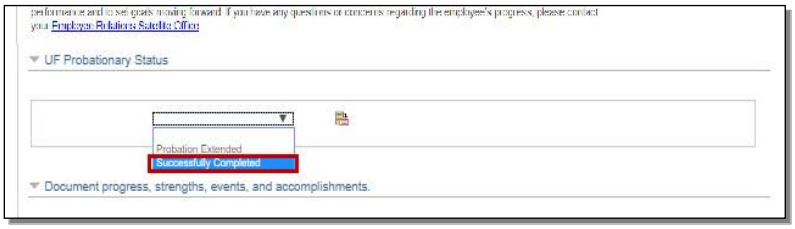


2. First, click the **UF Probationary Status** dropdown.

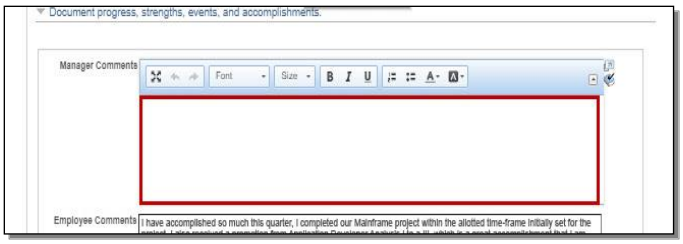


3. You have two choices, **Probation Extended** and **Successfully Completed**. Click **Successfully Completed**.

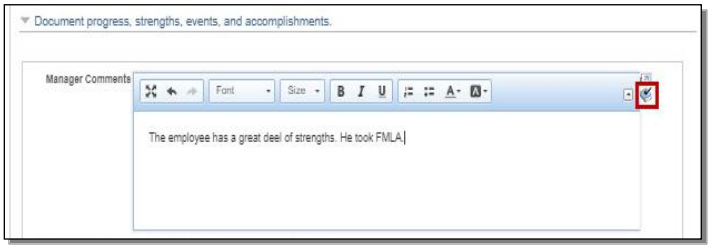
   NOTE: If you are considering extending the employee's probationary period, please contact your department Human Resources representative. If you request an extension of the Probation Period, this document will be routed to Employee Relations for review and approval.



4. There are three text entry fields you must fill out for the Six Month Probation Check-in. Note that below where you enter your comments, you will see your employee's comments if they have entered any. Fill out the first **text entry field**.



5. Do not forget to Spell Check your Comments by clicking the **Spell Check** icon.

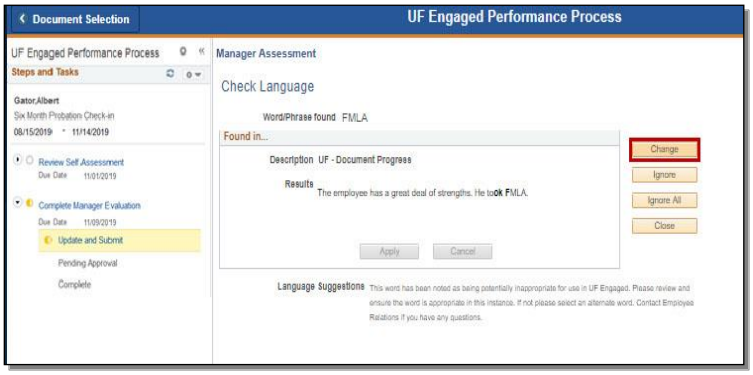


6. Next this simulation will demonstrate the **Check Language** function. Check Language is a tool that will review your Manager Comments for words that may not be appropriate for a Check-in. The Manager Comments include the sentence "He took FMLA." Click **Check Language**.

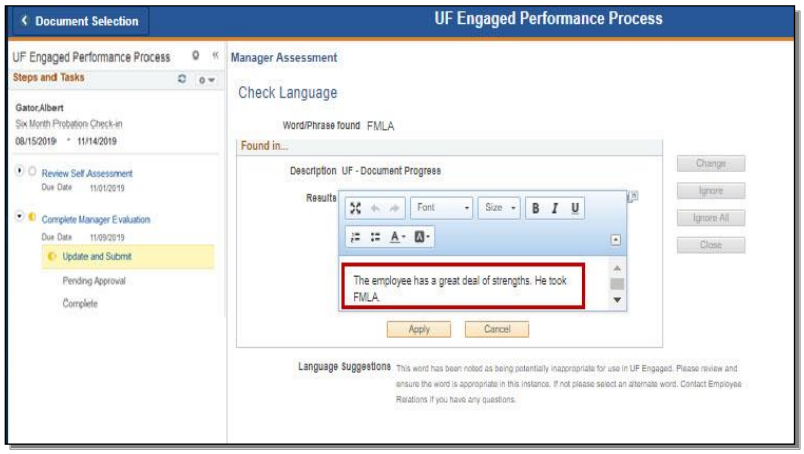
7. The Check Language function has identified the word **FMLA** as potentially inappropriate for a Check-in. If a word is flagged by the Check Language tool, you can change your word choice by clicking the **Change** button.

   NOTE: There are cases when Check Language will identify words that can remain in your comments. For example, if the sentence read "Albert was instrumental in developing an FMLA process for the University," that would be an appropriate use of FMLA. In that case, you would click the Ignore button.

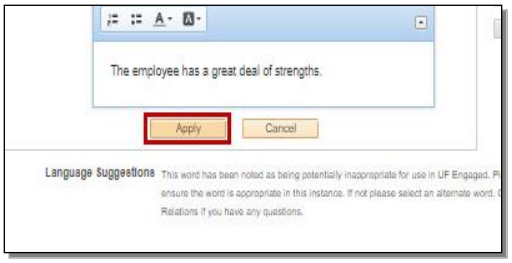
   If you have questions or concerns about words identified by the Check Language tool, please contact your department Human Resources representative.



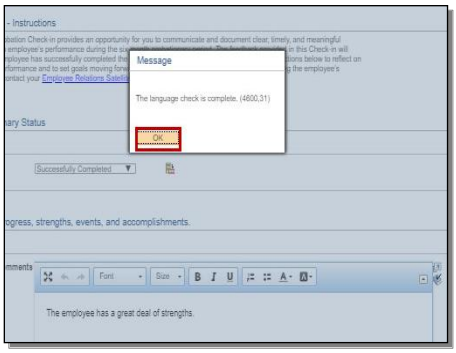
8. A text editor will appear. You will need to make adjustments as appropriate. In this example, the sentence **He took FMLA** will be deleted.



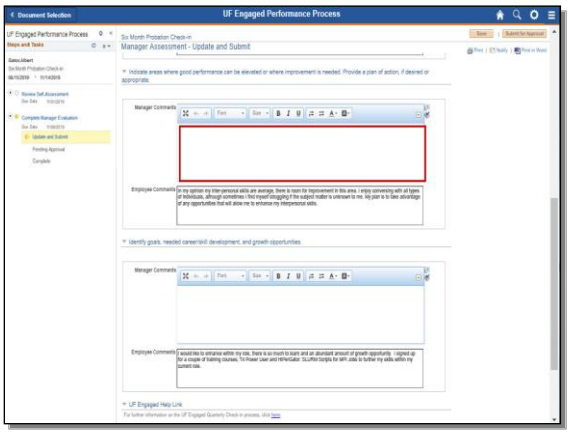
9. Click the **Apply** button.

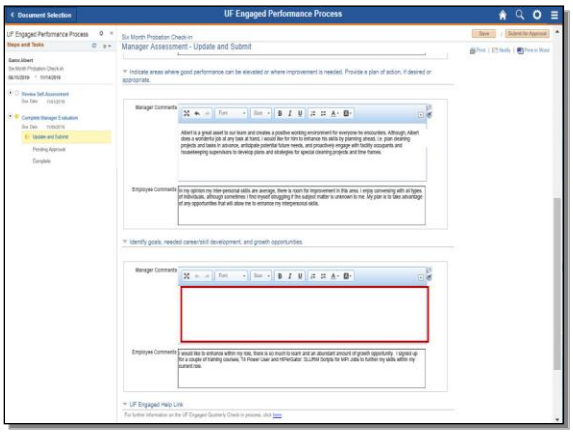


10. The language has been modified. Click the **OK** button.

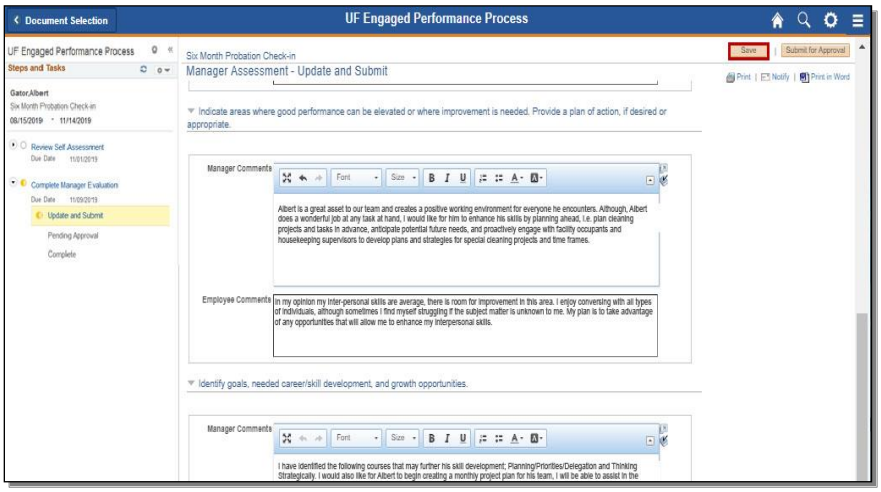


11. Next, scroll down and fill out the second and third **text entry fields**.





12. At any point while filling out the Six Month Probation Check-in, you can save your progress by clicking the **Save** button. If you save your progress, you can exit the page and return to add more information later. Click the **Save** button to continue.

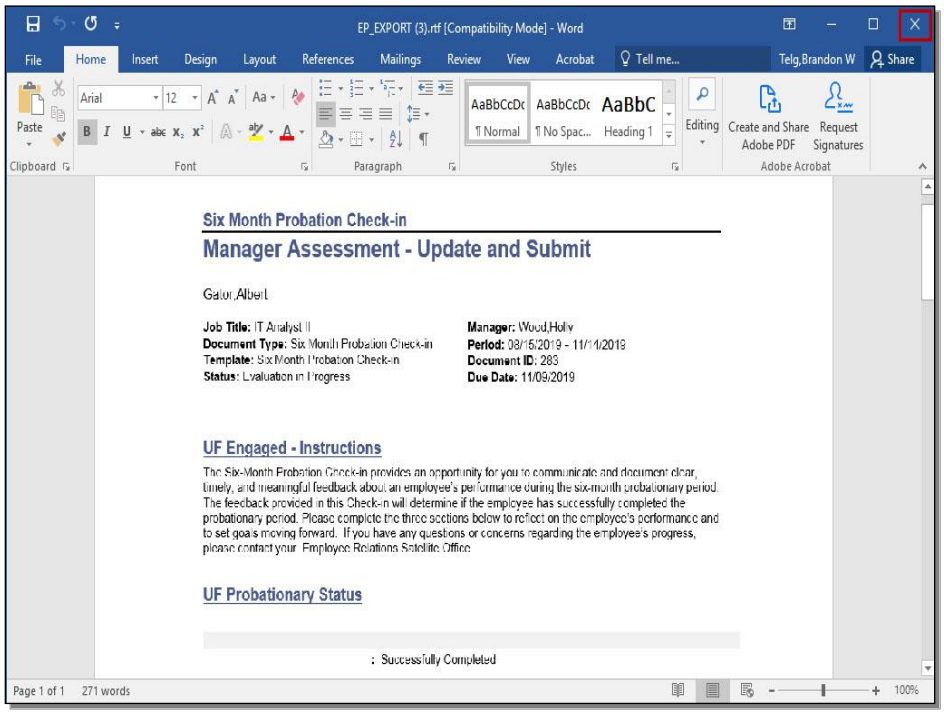


13. Once you have saved your Six Month Probation Check-in, you can **Print in Word**. This function creates a Word Document version of the Check-in. Click **Print in Word**.

    NOTE: Depending on your browser of choice, the steps to download a file may vary. This simulation demonstrates how to download and open a file using Chrome.

14. Click the **downloaded file** to open it.

15. This document can be saved for your records. Click the **Close** icon to continue.

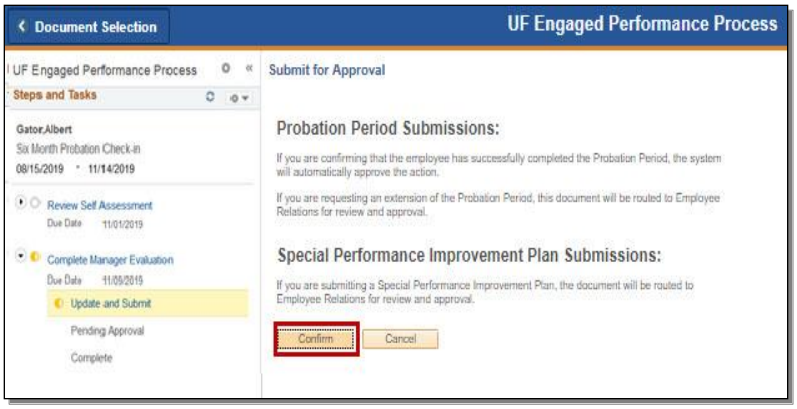
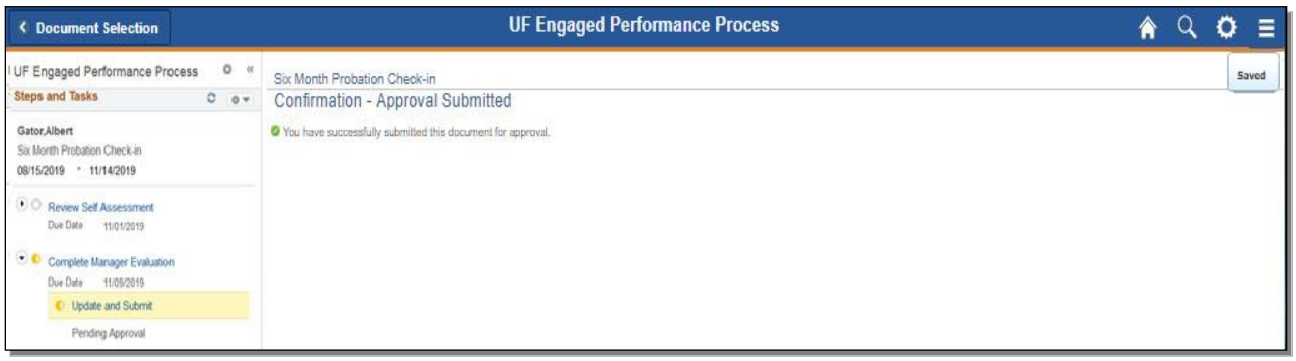


16. Once you have finalized your Six Month Probation Check-in, click the **Submit for Approval** button.

    Best Practice: Have the Six Month Probation Check-in conversation prior to clicking Submit. Please consider if any additional information should be added as a result of the Six Month Probation Check-in conversation.

17. Click the **Confirm** button. Once you click Confirm, the employee will be able to read your Manager Comments.

    NOTE: If you requested an extension, the request will be routed to UFHR Employee Relations. The employee will be able to view your comments after review and approval by UFHR Employee Relations.



18. You have successfully completed the Six-Month Probation Check-in.