

## 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 **Period End Date**, the employee will default to have successfully completed their probationary period.

← Select Not	e			Current Pe	rformance D	ocuments						
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Listed are the cur	rrent performance document	s for which you are the Manager.										
Filter Crite	eria											
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	Document Type	Six Month Probation Check-in	✓ Document Statu	is		•						
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RQ							< 1-2 of 2 > >					
Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date					
43634551	Doe,Jane	Six Month Probation Check-in	Evaluation in Progress	05/01/2024	10/31/2024	IT Analyst II	10/26/2024					
93511288	Gator, Albert	Six Month Probation Check-in	Evaluation in Progress	05/01/2024	10/31/2024	IT Special Projects Analyst	10/26/2024					
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2. First, click the **UF Probationary Status** dropdown.

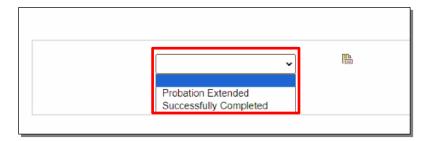
Actions					
-	Job Title	IT Special Projects Analyst	Manager	Doe, Jane	
	Document Type	Six Month Probation Check-in	Period	05/01/2024	10/31/2024
	Template		Document ID	193250	
	Status	Evaluation in Progress	Due Date	10/26/2024	
Expand All   • •	Collapse All 📔 🖌 Check	Language   🛞 Cancel Evaluation			
V UF Engaged	- Instructions				
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Training and Organizational Development Human Resources University of Florida, Gainesville, FL 32611



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

**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. Even if being extended, the review still must be completed, with specific feedback for improvement; do not submit a blank or incomplete form.



4. There are four 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**.

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Employee Comments	Employee has not completed their self-assessment	

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

Manager Comments	$ \begin{tabular}{lllllllllllllllllllllllllllllllllll$	
Employee Comments	Employee has not completed their self-assessment	

6. Next, use the **Check Language** tool, which will review your Manager Comments for words that may not be appropriate for a Check-in. For example, managers should not reference that someone using FMLA in UF Engaged. Click **Check Language**.

**Human Resources** 

Training & Organizational Development

UF





	Status Eval	uation in Progress
• Expand All   • Collar	ose All 📔 🖌 Check Langu	age Cancel Evaluation

7. 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.

Manager Assessment								
Check Language								
Word/Phrase found FMLA								
Found in				Change				
Description	Description UF - Document Progress							
Results The employee has a	great deal of strengths. Th	e employee took FMLA.		Ignore All				
				Close				
	Apply	Cancel						
Language Suggestions	Engaged. Please review a alternate word. Contact							

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

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	The employee has a great deal of strengths The employee took FMLA.	
	Apply Cancel	

9. Click the Apply button.





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The employee h	as a great deal of strengths	s.	
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guage Suggestions	This word has been r and ensure the word Employee Relations	is appropriate in this	instance. If not p

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

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11. Next, scroll down and fill out the remaining text entry fields.

Manager Comments	⇔♂A∜×AI×A×⊠×BI⊔∷≡≡×
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Employee Comments	Employee has not completed their self-assessment

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.

**NOTE**: Best practice is to click the **Save** button often when working in UF Engaged. UF Engaged does not automatically save your work for you. You do not want to lose your work due to not saving. Some find it helpful to type their Manager Assessments in Word, and then copy the text over into the UF Engaged Check-In.







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.

Save	Submit for Approval
	Print   🖻 Print in Word

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



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

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





**Best Practice:** Time permitting, 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.

Six Month Probation C	neck-in						Save	Subr	nit for Approval
Manager Assessment - Update and Submit									
Gator,Albert Actions -									
0	Job Title	IT Special Projects Analyst	Manager	Doe,Jane					
	Document Type	Six Month Probation Check-in	Period	05/01/2024	10/31/2024				
	Template		Document ID	193250					

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.

Probation Period Submissions:							
If you are confirming that the employee has successfully completed the Probation Period, the system will automatically approve the action.							
If you are requesting an extension of the Probation Period, this document will be routed to Employee Relations for review and approval.							
Special Performance Improvement Plan Submissions:							
If you are submitting a Special Performance Improvement Plan, the document will be routed to Employee Relations for review and approval.							
The overall rating you have assigned to this employee is Successfully Completed.							
Cancel							

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

