

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

- 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.

The screenshot shows the 'Current Performance Documents' interface. At the top, there is a navigation bar with a back arrow and the text 'Select Note' and 'Current Performance Documents'. Below this, the title 'Current Performance Documents' is followed by a subtitle 'Listed are the current performance documents for which you are the Manager.' There is a 'Filter Criteria' section with input fields for 'First Name', 'Last Name', 'Document Type' (set to 'Six Month Probation Check-in'), and 'Document Status'. Below the filter section is a table titled 'Documents you own'. The table has columns for 'Employee ID', 'Name', 'Document Type', 'Document Status', 'Period Begin', 'Period End', 'Job Title', and 'Next Due Date'. Two rows are visible: one for 'Doe, Jane' and one for 'Gator Albert'. The 'Gator Albert' row is highlighted with a red box.

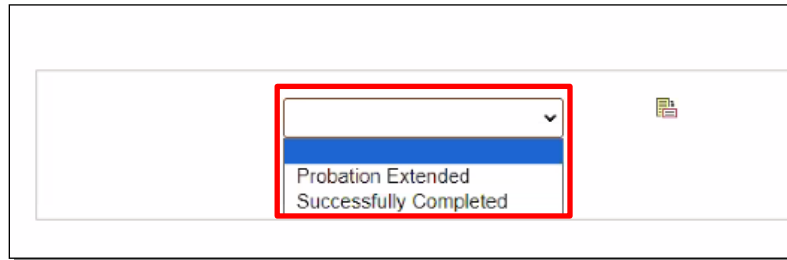
Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
43834551	Doe, Jane	Six Month Probation Check-in	Evaluation in Progress	05/01/2024	10/31/2024	IT Analyst II	10/28/2024
93511288	Gator Albert	Six Month Probation Check-in	Evaluation in Progress	05/01/2024	10/31/2024	IT Special Projects Analyst	10/28/2024

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

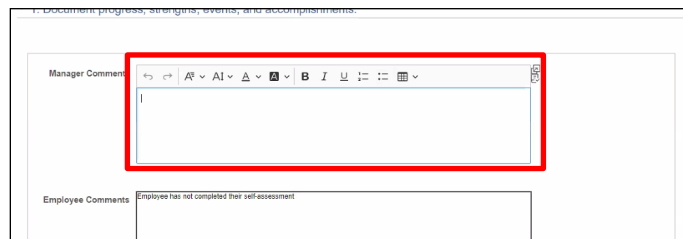
The screenshot shows the details view for the 'Gator Albert' document. At the top, there is a profile picture and a list of details: 'Job Title: IT Special Projects Analyst', 'Manager: Doe, Jane', 'Document Type: Six Month Probation Check-in', 'Template: Evaluation in Progress', 'Period: 05/01/2024 - 10/31/2024', 'Document ID: 193250', and 'Due Date: 10/28/2024'. Below this, there are several sections: 'UF Engaged - Instructions' and 'UF Probationary Status'. The 'UF Probationary Status' section contains a dropdown menu with a red box around it, indicating where to click.

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

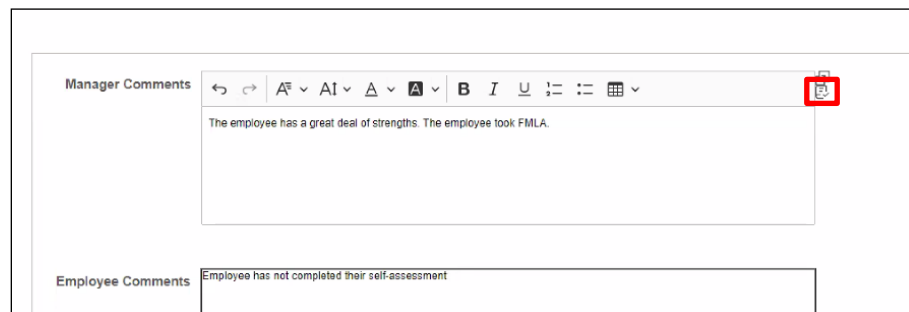
NOTE: If you are considering extending the employee’s probationary period, please contact your department Human Resources representative. If you request an extension of the Probation Period, this document will be routed to Employee Relations for review and approval. Even if being extended, the review still must be completed, with specific feedback for improvement; do not submit a blank or incomplete form.



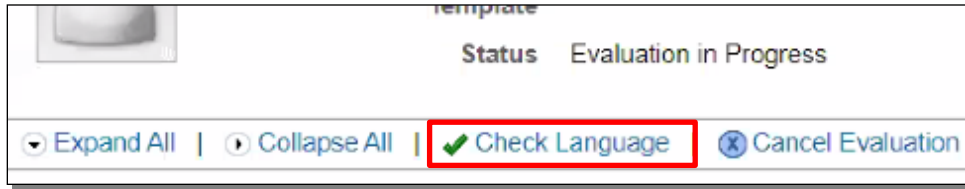
- There are four text entry fields you must fill out for the Six Month Probation Check-in. Note that below where you enter your comments, you will see your employee’s comments if they have entered any. Fill out the first **text entry field**.



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



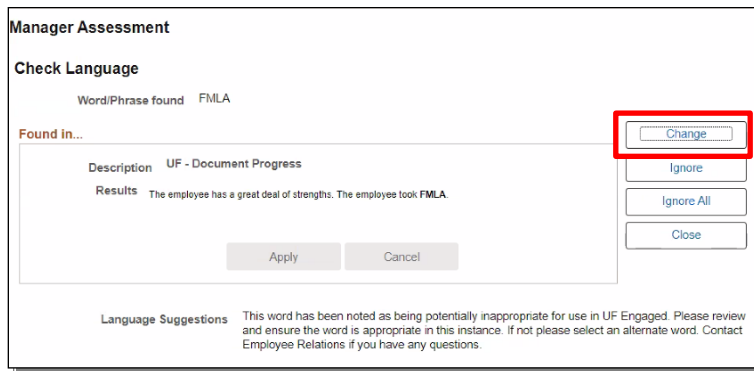
- Next, use the **Check Language** tool, which will review your Manager Comments for words that may not be appropriate for a Check-in. For example, managers should not reference that someone using FMLA in UF Engaged. Click **Check Language**.



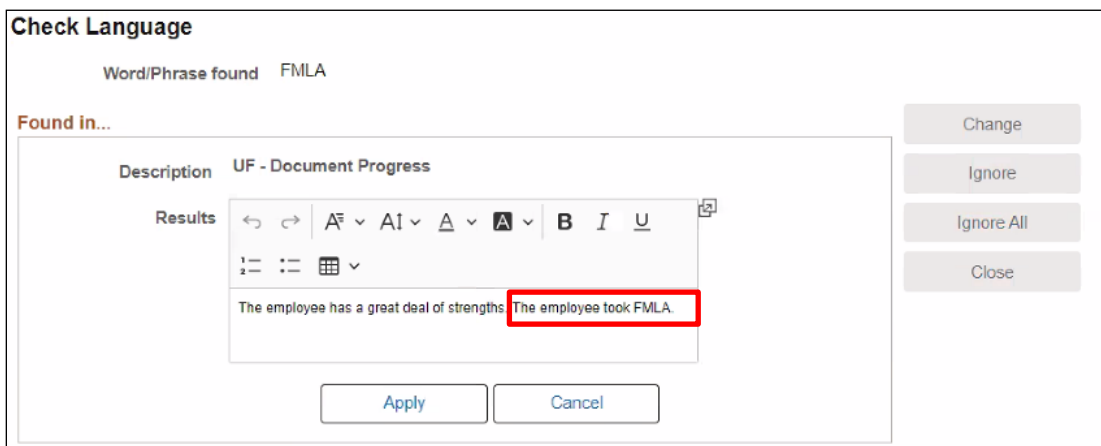
7. If a word is flagged by the Check Language tool, you can change your word choice by clicking the **Change** button.

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.

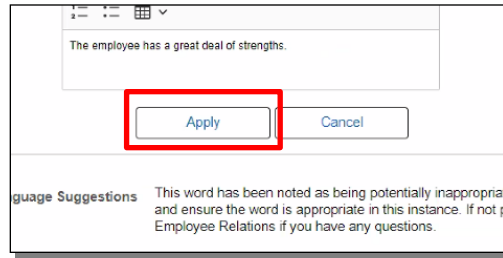
If you have questions or concerns about words identified by the Check Language tool, please contact your department Human Resources representative.



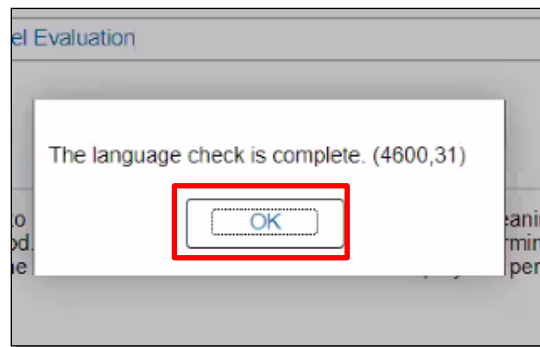
8. A text editor will appear. You will need to make adjustments as appropriate. In this example, the sentence **The employee took FMLA** will be deleted.



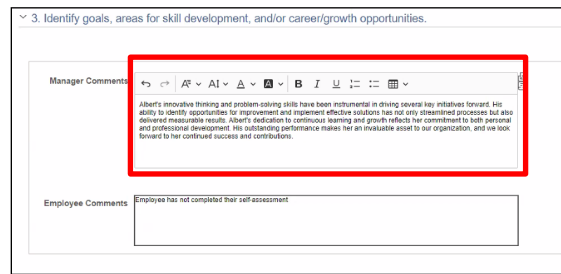
9. Click the **Apply** button.



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

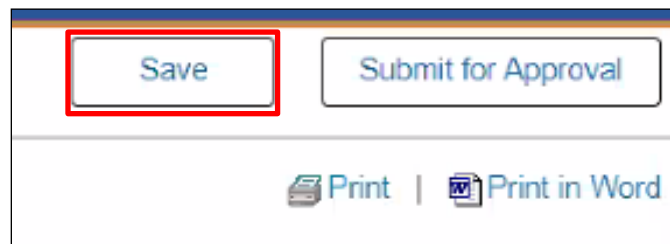


11. Next, scroll down and fill out the remaining **text entry fields**.



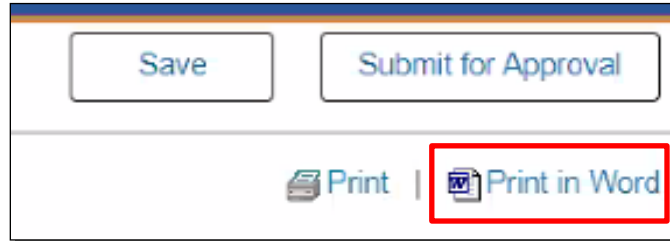
12. At any point while filling out the Six Month Probation Check-in, you can save your progress by clicking the **Save** button. If you save your progress, you can exit the page and return to add more information later. Click the **Save** button to continue.

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.

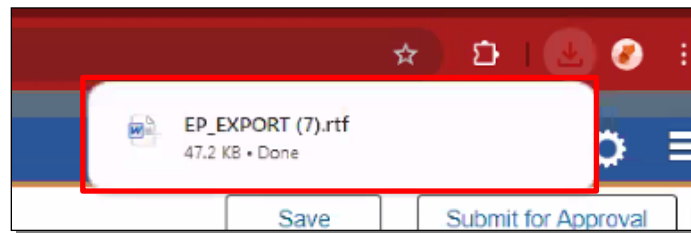


13. Once you have saved your Six Month Probation Check-in, you can **Print in Word**. This function creates a Word Document version of the Check-in. Click **Print in Word**.

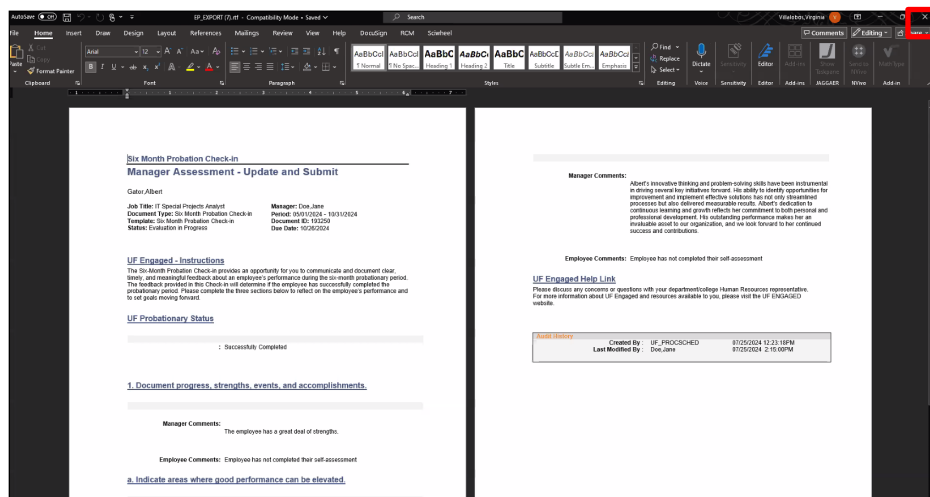
NOTE: Depending on your browser of choice, the steps to download a file may vary. This simulation demonstrates how to download and open a file using Chrome.



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: 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 Check-in [Save] [Submit for Approval]

Manager Assessment - Update and Submit [Print] [Print in Word]

Gator, Albert
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	

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**.

[Confirm] [Cancel]

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

Six Month Probation Check-in

Confirmation - Approval Submitted

✔ You have successfully submitted this document for approval.