

Note: The Probation Extension evaluation is a back-and-forth process between the employee and manager. This guide illustrates the processes for both roles in sequential order to provide a complete understanding of the entire Probation Extension evaluation process.

Probation Extension Evaluations should only be utilized if a probationary period is extended, and the initial probationary evaluation is no longer available in Connect.

1. **Manager** creates the Probation Extension evaluation in Connect.
2. **Manager** evaluates employee.
3. **Manager** shares evaluation with employee.
4. **Employee** reviews and acknowledges evaluation.

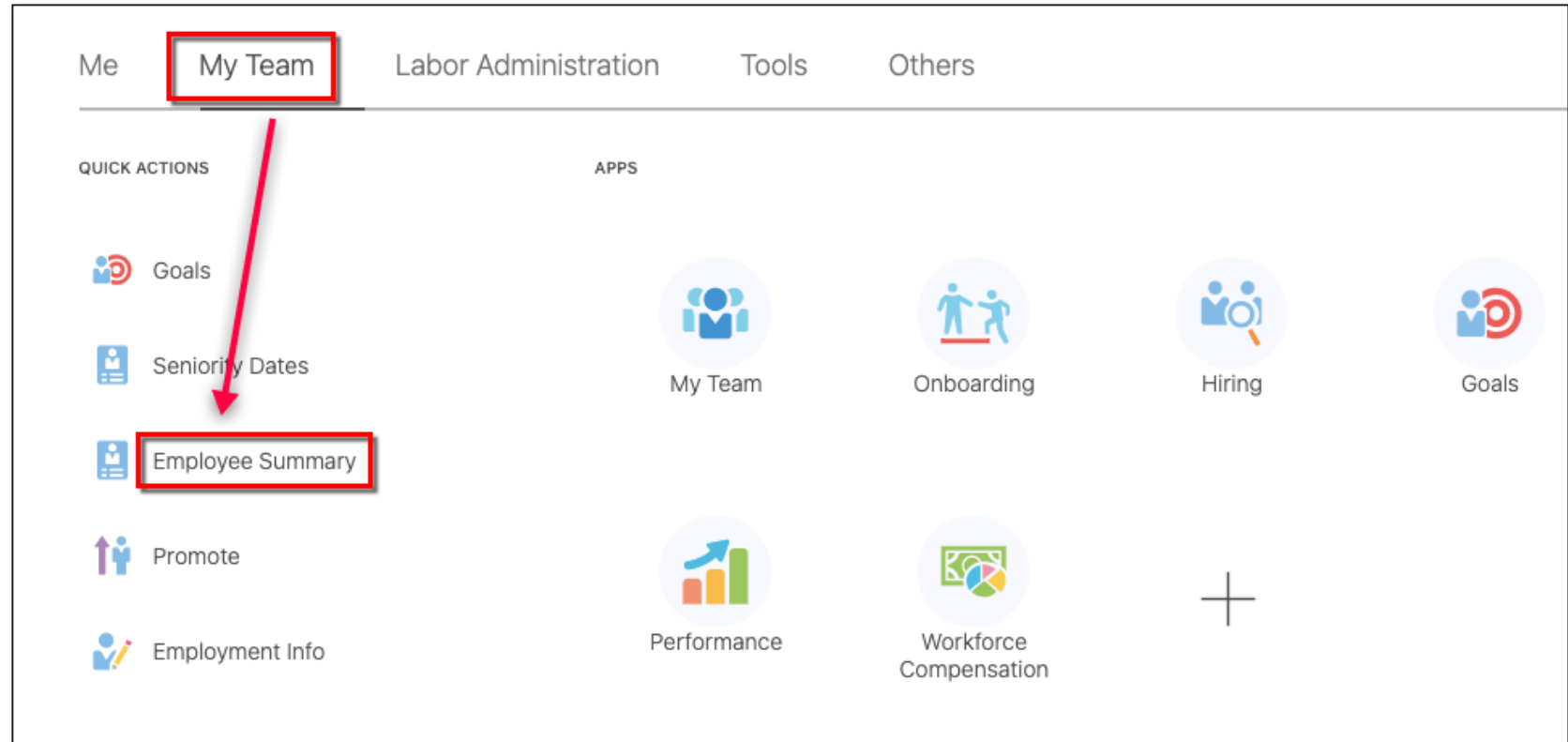
Manager & Employee have a review meeting to discuss evaluation (occurs outside of Connect).

5. **Employee** enters final employee evaluation comments.
6. **Manager** enters final manager evaluation comments.

1. Manager creates Probation Extension Evaluation

Connect 1. Manager Creates Probation Extension Evaluation

1. From the **My Team** tab, click the **Employee Summary** menu.



Connect 1. Manager Creates Probation Extension Evaluation

2. Select the **employee** for whom you will be performing the Probation Extension evaluation.

< Employee Summary

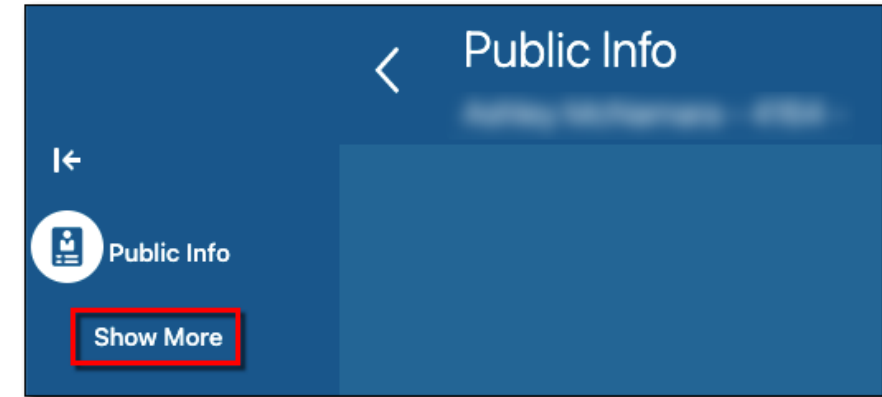
Search for a Person

Direct Reports

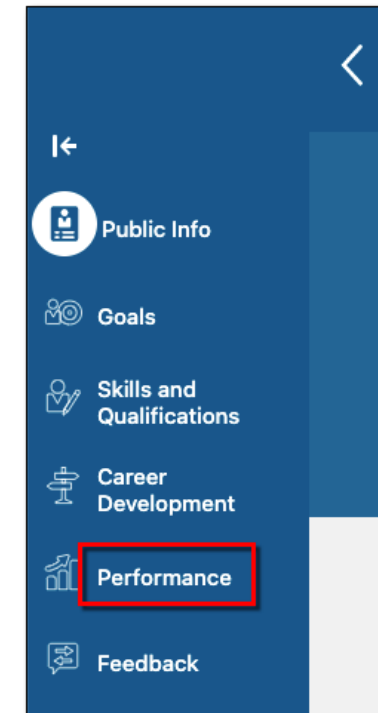
	Employee Name Employee Title	Employee Email
	Employee Name Employee Title	Employee Email
	Employee Name Employee Title	Employee Email
	Employee Name Employee Title	Employee Email
	Employee Name Employee Title	Employee Email

Connect 1. Manager Creates Probation Extension Evaluation

3. Click the **Show More** menu.



4. Click the **Performance** menu.



Connect 1. Manager Creates Probation Extension Evaluation

5. Click the **Add** button.

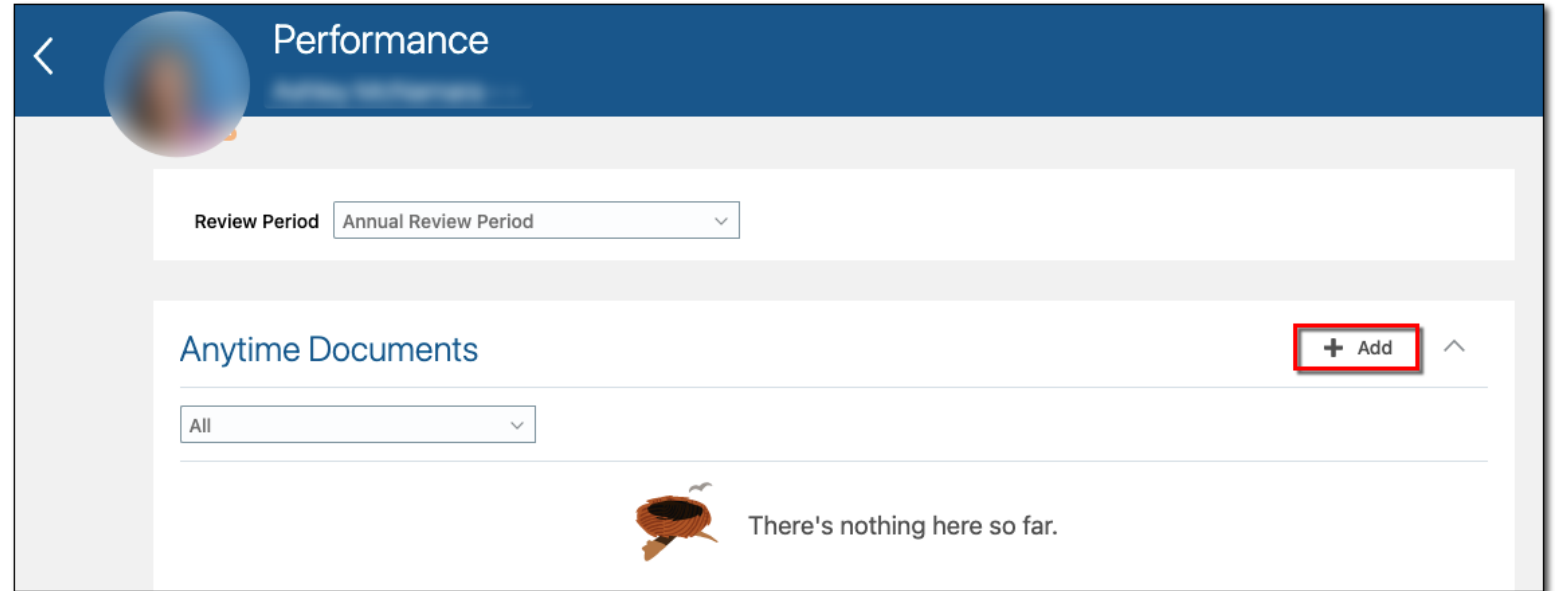
6. Select **Probation Extension Evaluation** for the **Performance Document Name**.

7. Enter the evaluation **Description**.

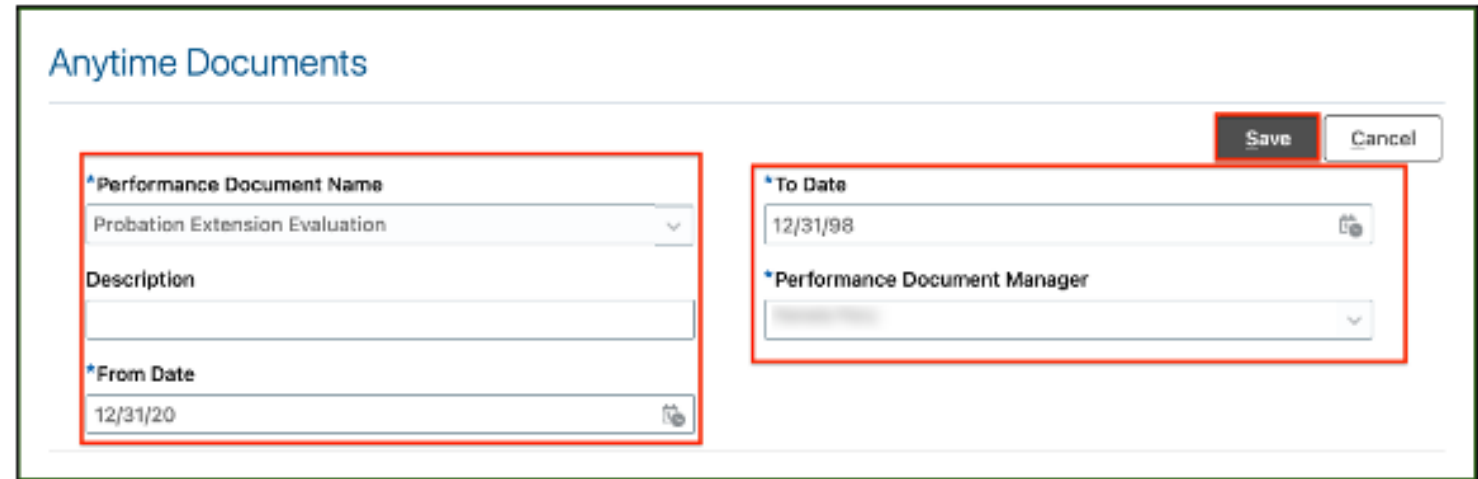
8. Enter the evaluation period **From Date** and **To Date** remembering this is for an extended probationary period.

9. Performance Document Manager populates automatically.

10. Click the **Save** button.



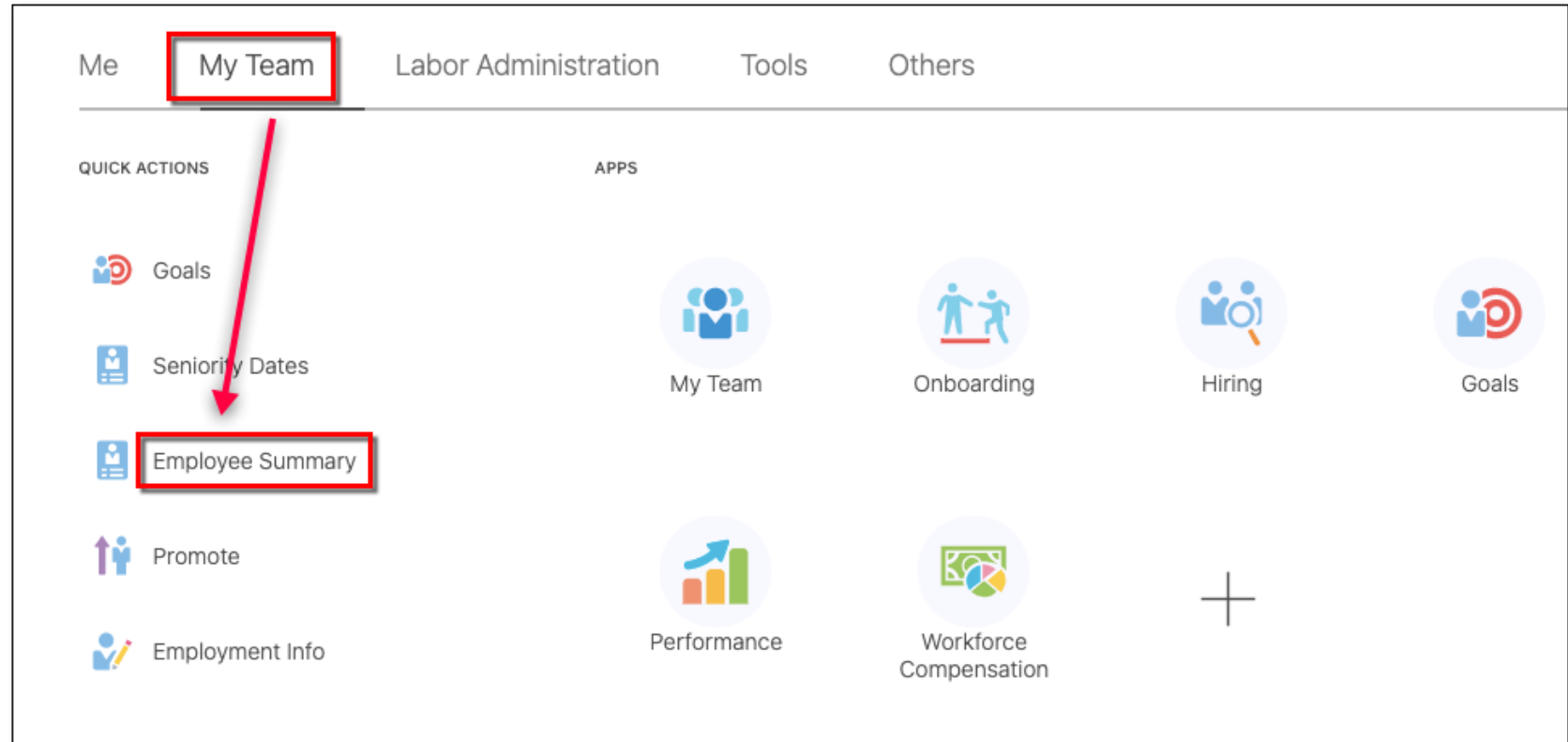
The screenshot shows the 'Performance' page header with a back arrow and a user profile. Below the header, there is a 'Review Period' dropdown menu set to 'Annual Review Period'. The main section is titled 'Anytime Documents' and contains a dropdown menu set to 'All'. A red box highlights the '+ Add' button in the top right corner of the 'Anytime Documents' section. Below the button, there is a message 'There's nothing here so far.' with a small icon of a nest.



The screenshot shows the 'Anytime Documents' form. It has a 'Save' button and a 'Cancel' button in the top right corner. The form contains several fields: 'Performance Document Name' (a dropdown menu with 'Probation Extension Evaluation' selected), 'Description' (a text input field), 'From Date' (a date input field with '12/31/20' and a calendar icon), 'To Date' (a date input field with '12/31/98' and a calendar icon), and 'Performance Document Manager' (a dropdown menu). Red boxes highlight the 'Performance Document Name' field, the 'From Date' field, the 'To Date' field, and the 'Performance Document Manager' field.

2. Manager evaluates employee

1. From the **My Team** tab, click the **Employee Summary** menu.



2. Select the **employee** for whom you will be performing the Probation Extension Evaluation.

Employee Summary

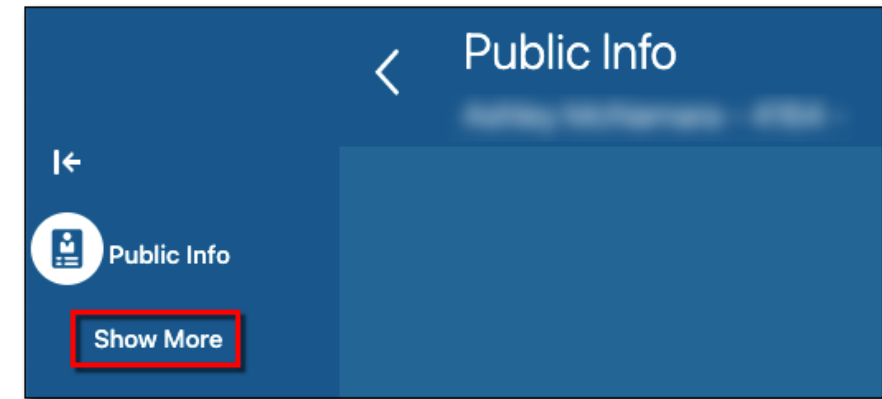
Search for a Person

Direct Reports

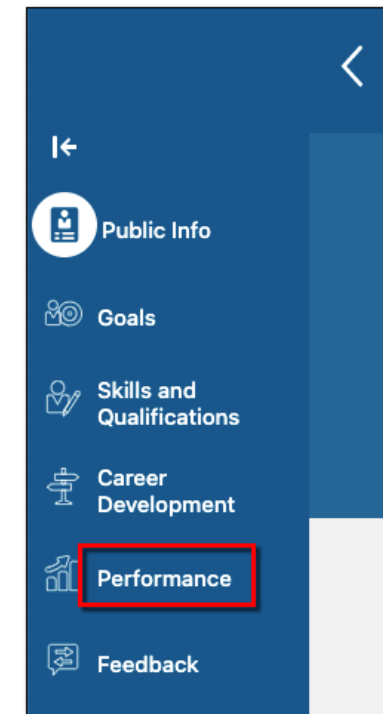
	Employee Name Employee Title	Employee Email
	Employee Name Employee Title	Employee Email
	Employee Name Employee Title	Employee Email
	Employee Name Employee Title	Employee Email
	Employee Name Employee Title	Employee Email

2. Manager Evaluates Employee

3. Click the **Show More** menu.



4. Click the **Performance** menu.



Note: You can see where you are in the evaluation process by viewing the **Task Completion** and **All Tasks**.

5. Click the link for the **Probation Extension Evaluation** created in the previous steps.

Anytime Documents

All

Probation Extension Evaluation

By **Human Resources**

Current Task
Manager Evaluation of Workers

Task Completion

0 / 5

All Tasks

- ➔ Manager Evaluation of Workers
- Manager Shares Performance Document
- Staff Reviews and Acknowledges Evaluation
- Staff Share input
- Manager Provides Final Feedback

6. Click the **Evaluate** button to evaluate the employee's **Competencies**.

Evaluation Topics

Competencies
0 of 9 rated | 0 of 9 commented

Manager Rating

☆ ☆ ☆ ☆ ☆

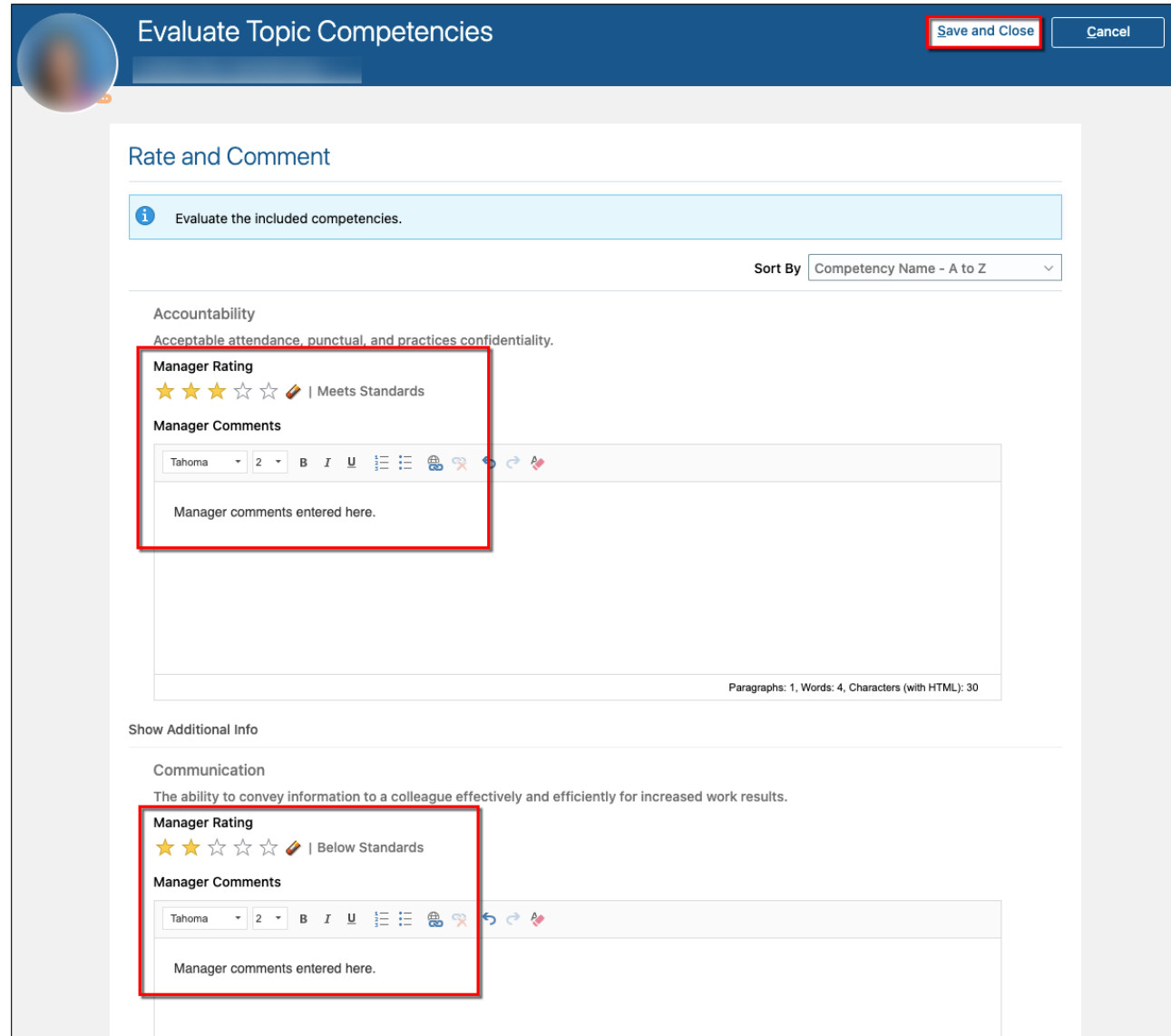
Manager Comments

Evaluate

7. Complete each **Rating** and the **Summary Rating** for all Competencies.

Note: All competencies and the Summary must be rated. Comments are encouraged but not required.

8. When finished, click **Save and Close**.



Evaluate Topic Competencies Save and Close Cancel

Rate and Comment

i Evaluate the included competencies.

Sort By Competency Name - A to Z

Accountability
Acceptable attendance, punctual, and practices confidentiality.

Manager Rating
★★★★☆ | Meets Standards

Manager Comments
Tahoma 2 B I U [Rich Text Editor Icons]
Manager comments entered here.

Paragraphs: 1, Words: 4, Characters (with HTML): 30

Show Additional Info

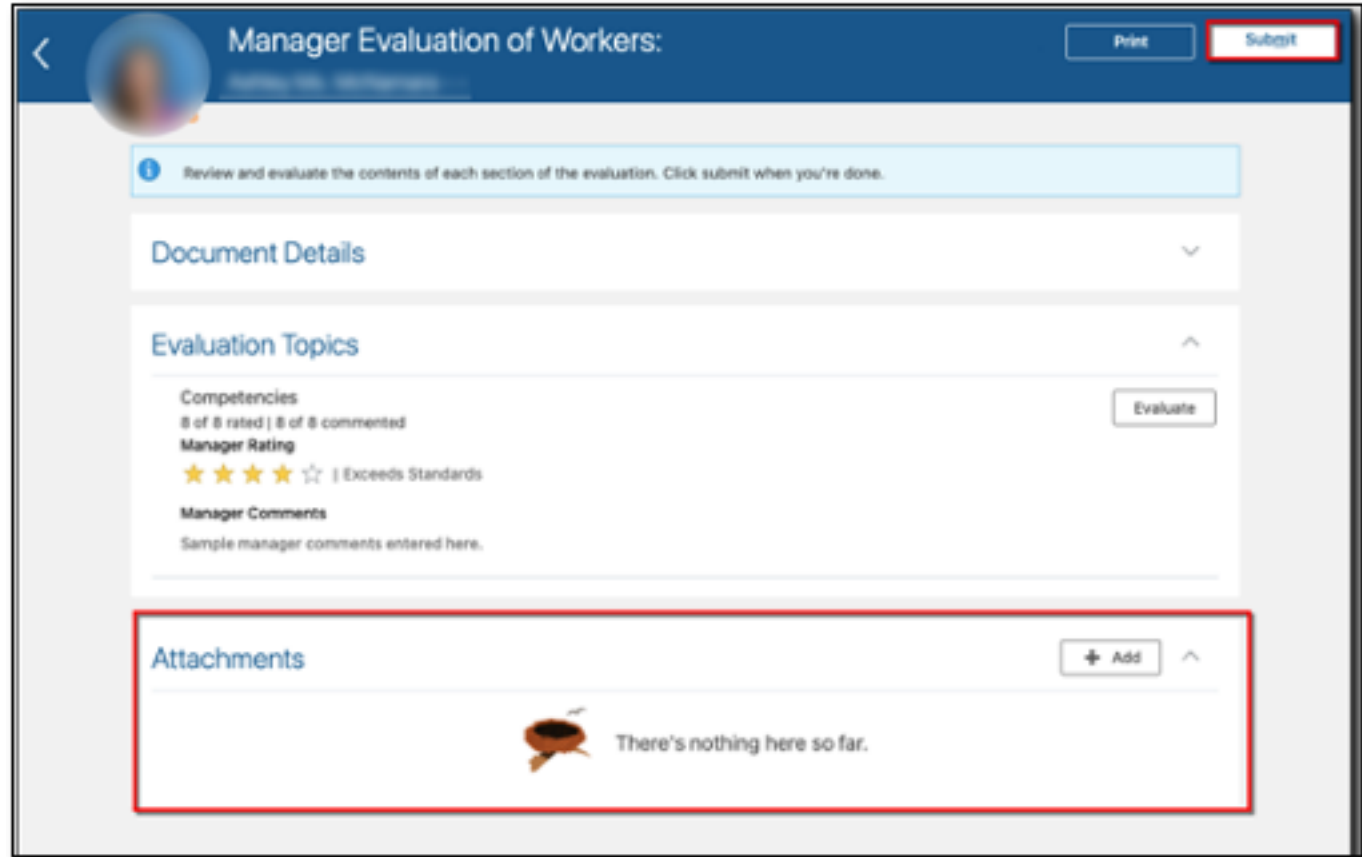
Communication
The ability to convey information to a colleague effectively and efficiently for increased work results.

Manager Rating
★★★☆☆ | Below Standards

Manager Comments
Tahoma 2 B I U [Rich Text Editor Icons]
Manager comments entered here.

Note: Attachments can be added to this evaluation by clicking the **arrow** to expand the section, clicking **Add**, then uploading the applicable document.

9. When finished, click the **Submit** button.



Manager Evaluation of Workers: Print Submit

Review and evaluate the contents of each section of the evaluation. Click submit when you're done.

Document Details

Evaluation Topics

Competencies
8 of 8 rated | 8 of 8 commented

Manager Rating
★★★★☆ | Exceeds Standards

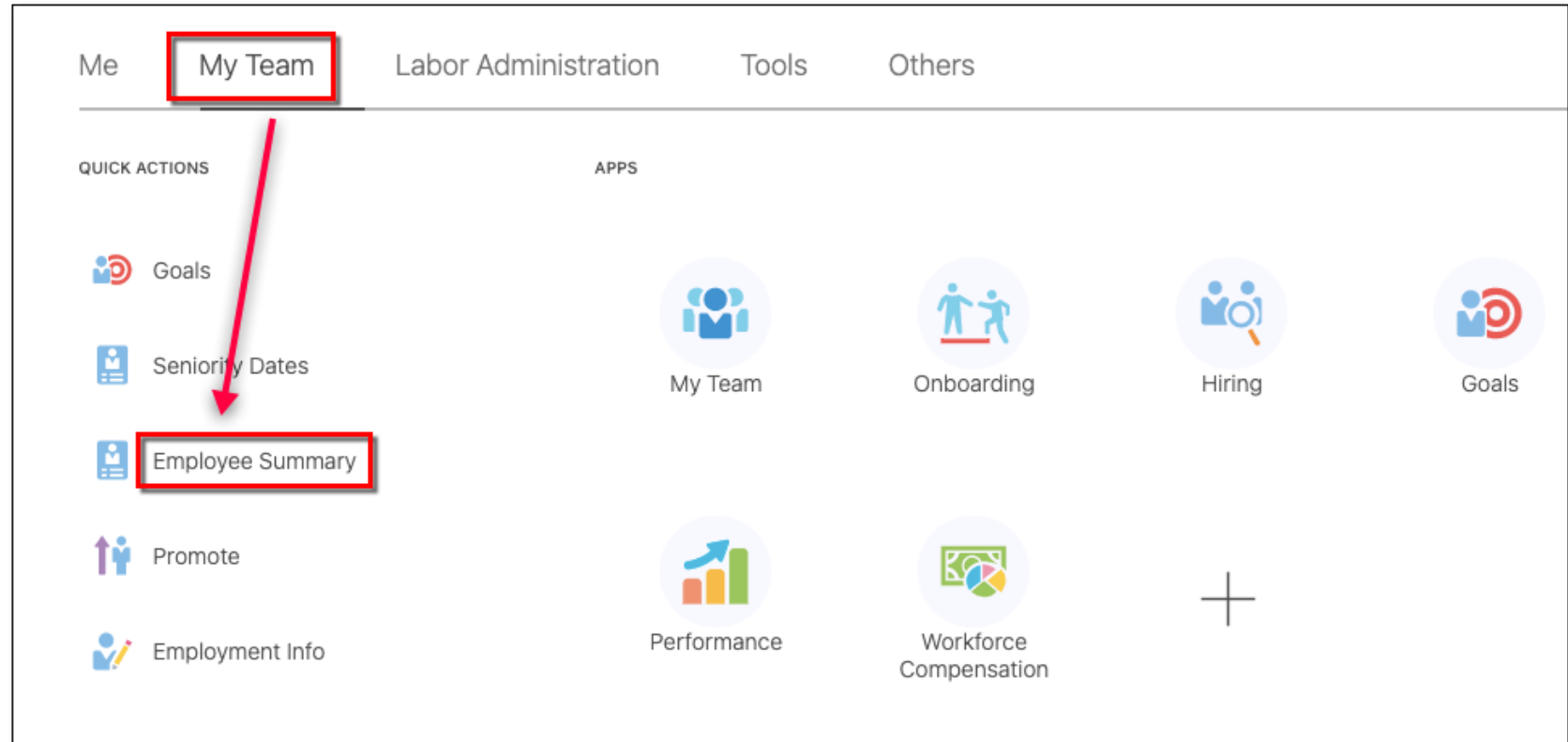
Manager Comments
Sample manager comments entered here.

Attachments + Add

There's nothing here so far.

3. Manager shares evaluation with employee

1. From the **My Team** tab, click the **Employee Summary** menu.



2. Select the **employee** for whom you will be sharing the evaluation.

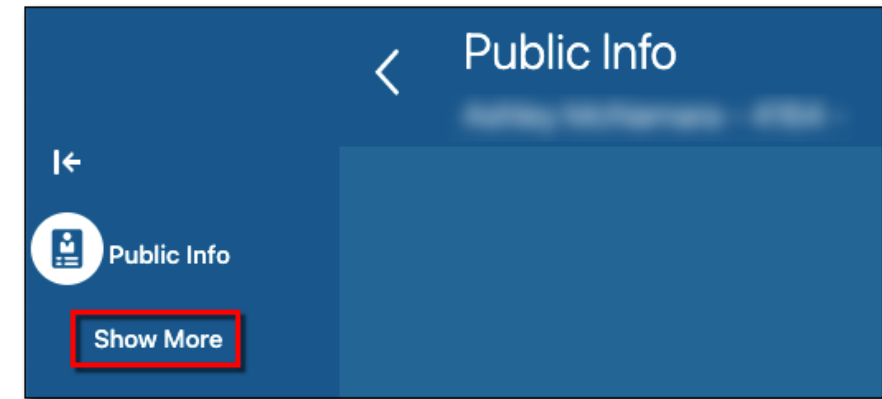
Employee Summary

Search for a Person

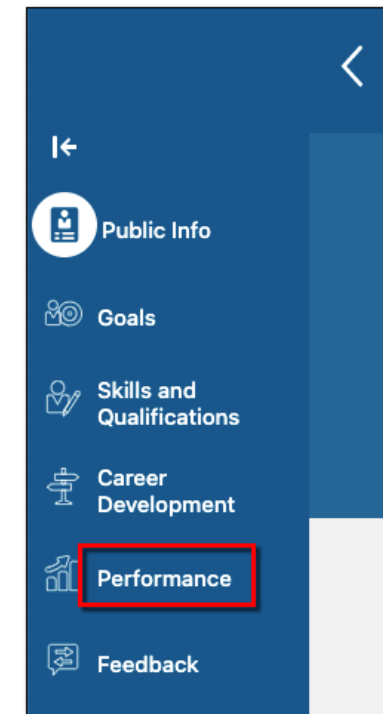
Direct Reports

	Employee Name Employee Title	Employee Email Employee Phone
	Employee Name Employee Title	Employee Email Employee Phone
	Employee Name Employee Title	Employee Email Employee Phone
	Employee Name Employee Title	Employee Email Employee Phone
	Employee Name Employee Title	Employee Email Employee Phone

3. Click the **Show More** menu.



4. Click the **Performance** menu.



5. Click the link for the **Probation Extension Evaluation** used in the previous steps.

Note: Connect displays the current task to be completed and where you are in the overall evaluation process.

Anytime Documents

+ Add

^

All

Probation Extension Evaluation

★★★★☆ | By [redacted]

...

Current Task

Manager Shares Performance Document

Task Completion

1 / 5

All Tasks

✓ Manager Evaluation of Workers

➔ Manager Shares Performance Document

○ Staff Reviews and Acknowledges Evaluation

○ Staff Share input

○ Manager Provides Final Feedback

6. Review the evaluation as needed.

7. Click **Share and Release**.

Note: Share and Release locks the evaluation from further editing and shares the final version with the employee for review and to acknowledge receipt.

Note: Share and Retain allows the employee to review the evaluation but not acknowledge receipt.



Information

Share the evaluation for employee review. Retain control or release to progress to the next task.

Share and Retain

Share and Release

Document Details

Evaluation Topics

Competencies

9 of 9 rated | 0 of 9 commented

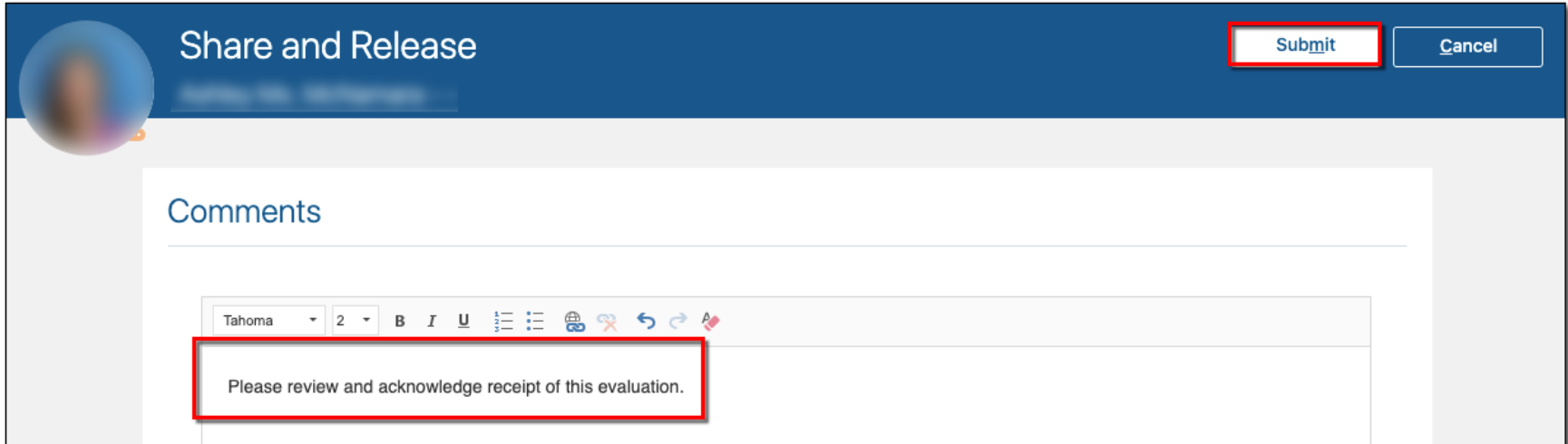
Manager Rating

★★★★★ | Outstanding

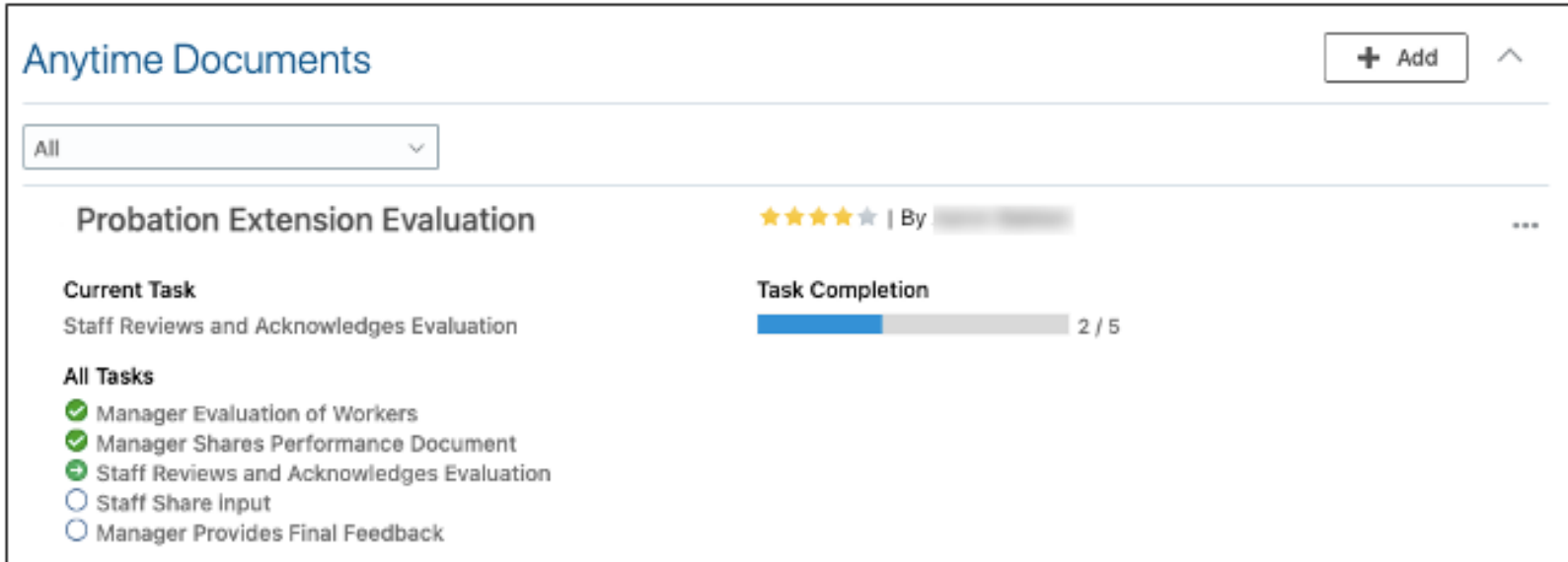
Manager Comments

View

8. Enter your **Comments**.
9. Click the **Submit** button.



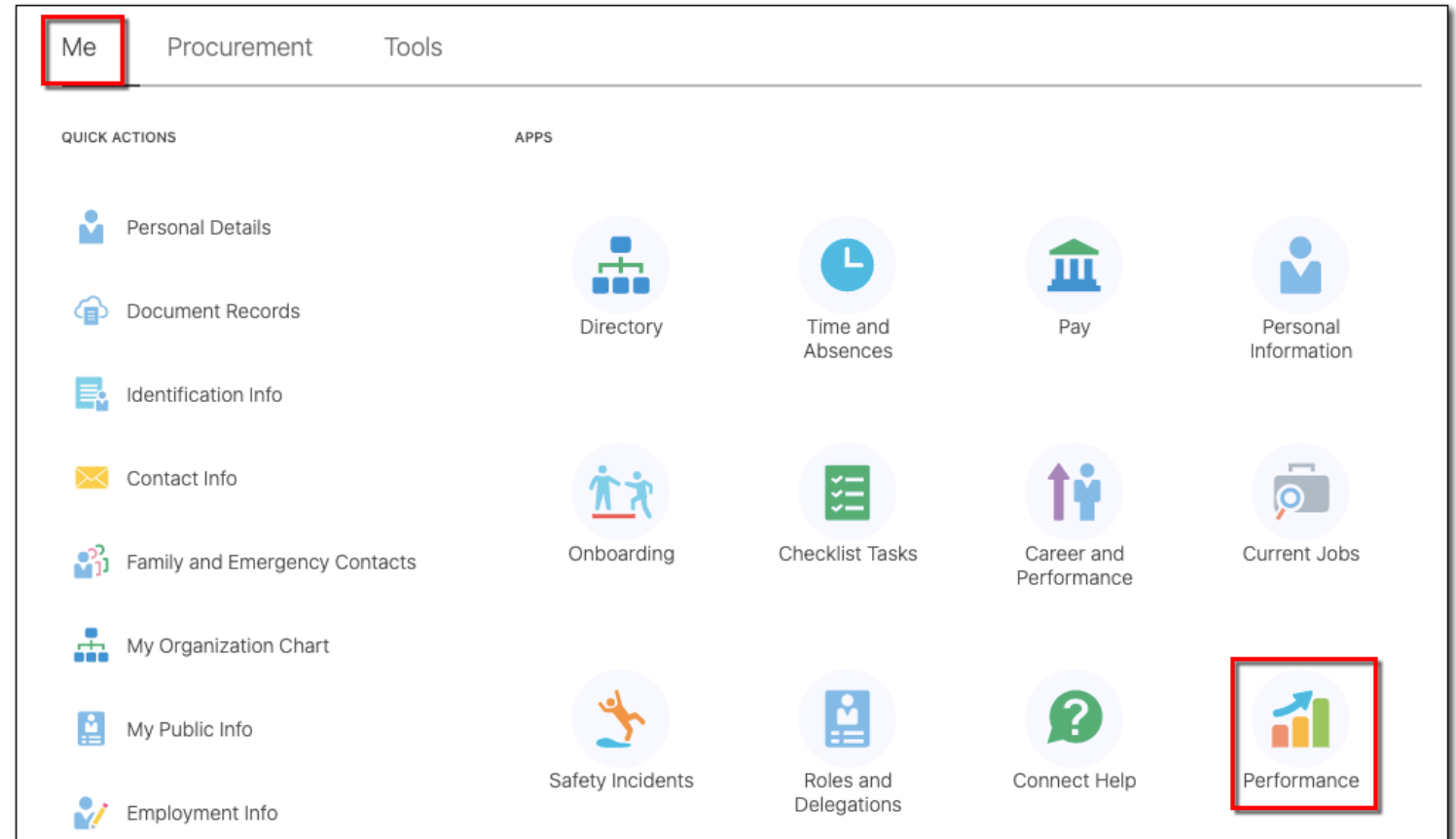
Note: When finished, Connect will display the **Current Task**, number of **Tasks Completed**, and where you are in the overall process.



4. Employee reviews and acknowledges evaluation

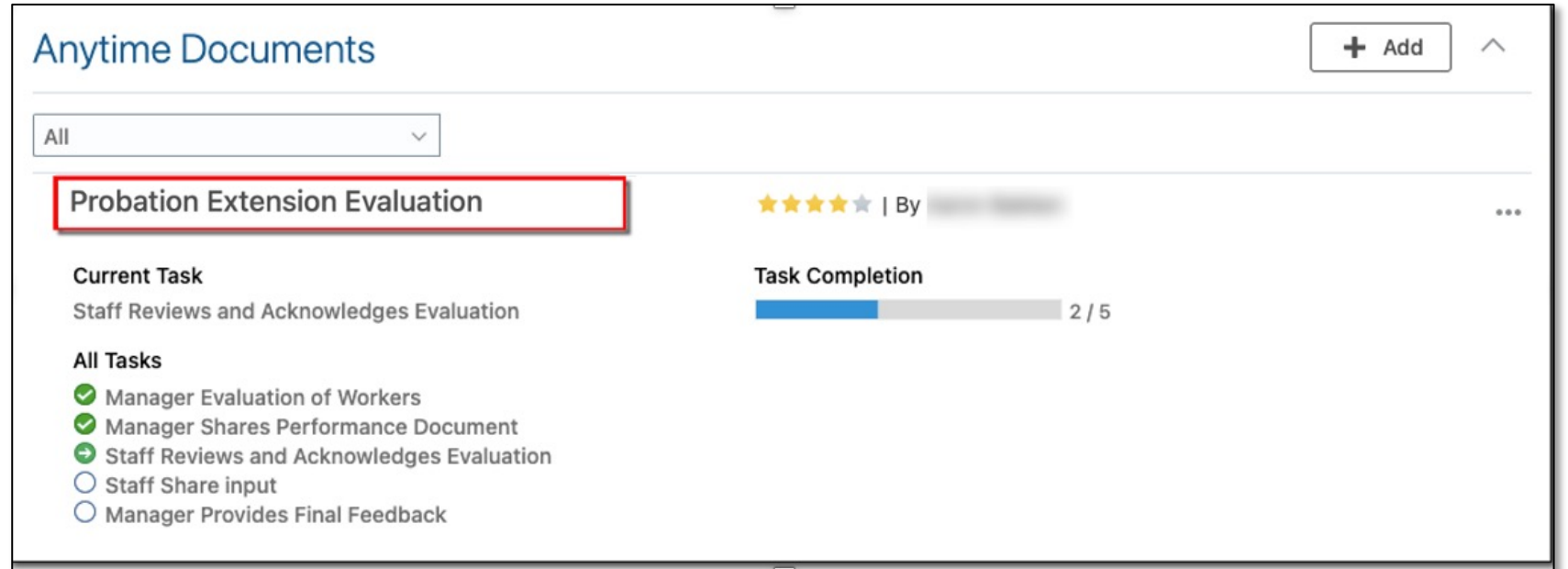
4. Employee Acknowledges Evaluation

1. Select **Me** to display your employee functions.
2. Click the **Performance** icon.



Note: Connect displays the current task to be completed and where you are in the overall evaluation process.

3. Click the **Probation Extension Evaluation** link.

The screenshot shows a web interface titled 'Anytime Documents'. At the top right is a '+ Add' button. Below the title is a dropdown menu currently set to 'All'. The main content area features a card for 'Probation Extension Evaluation', which is highlighted with a red border. To the right of this card is a star rating (4.5 stars) and the text 'By [blurred name]'. Below the card, there are two sections: 'Current Task' and 'All Tasks'. The 'Current Task' section lists 'Staff Reviews and Acknowledges Evaluation' with a progress bar showing '2 / 5' completion. The 'All Tasks' section lists five tasks: 'Manager Evaluation of Workers' (checked), 'Manager Shares Performance Document' (checked), 'Staff Reviews and Acknowledges Evaluation' (checked), 'Staff Share input' (unchecked), and 'Manager Provides Final Feedback' (unchecked).

- Click the **View** button to view the manager evaluation ratings for **Competencies**.

Evaluation Topics

Competencies

Manager Rating

★ ★ ★ ★ ★

| Outstanding

Manager Comments

View

Attachments

5. Review all **manager ratings** and **comments**.
6. When finished, click the **back arrow** to return to the **Acknowledgement** page.




Evaluated Topic Competencies

Ratings and Comments

Accountability

Acceptable attendance, punctual, and practices confidentiality.

Manager Rating

★★★★☆ | Exceeds Standards

Manager Comments

Sample manager comments entered here.

Show Additional Info

Communication

The ability to convey information to a colleague effectively and efficiently for increased work results.

Manager Rating

★★★★☆ | Exceeds Standards

Manager Comments

Sample manager comments entered here.

Show Additional Info

Environmental and Safety Practices

Follows health and safety practices, emergency/evacuation procedures, identifies of unsafe environmental factors and identifies and reports critical incidents.

Manager Rating

★★★☆☆ | Meets Standards

7. Click **Acknowledge Document**.



Information

Review the evaluation details shared by your manager and acknowledge receipt.

Acknowledge Document

Document Details

Evaluation Topics

Competencies

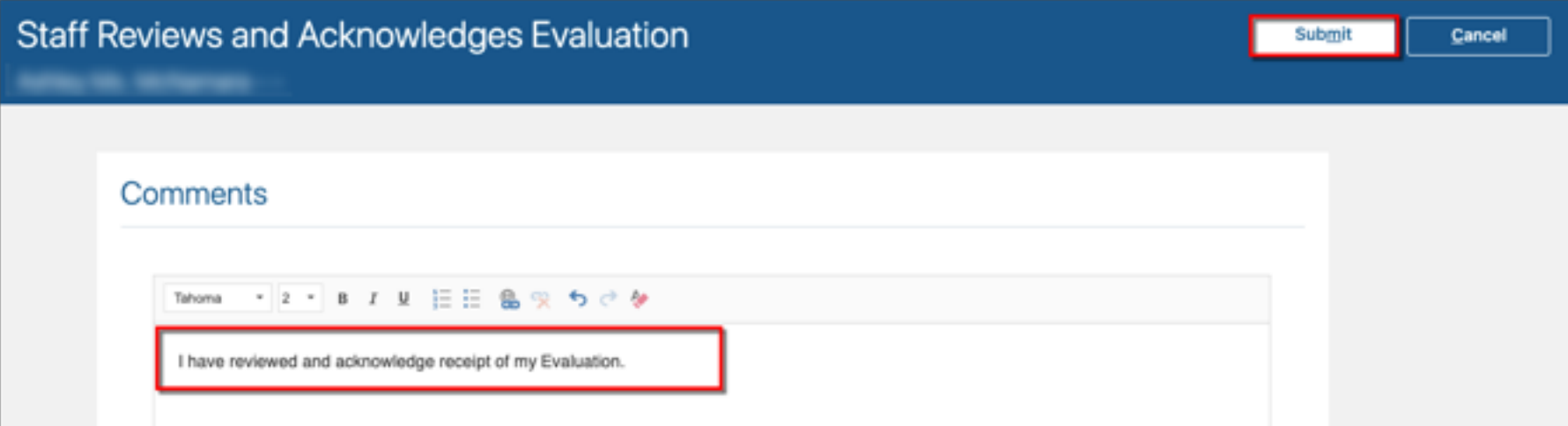
View

Manager Rating

★★★★★ | Outstanding

Manager Comments

8. Enter your **Comments**.
9. Click the **Submit** button.



Staff Reviews and Acknowledges Evaluation

Submit Cancel

Comments

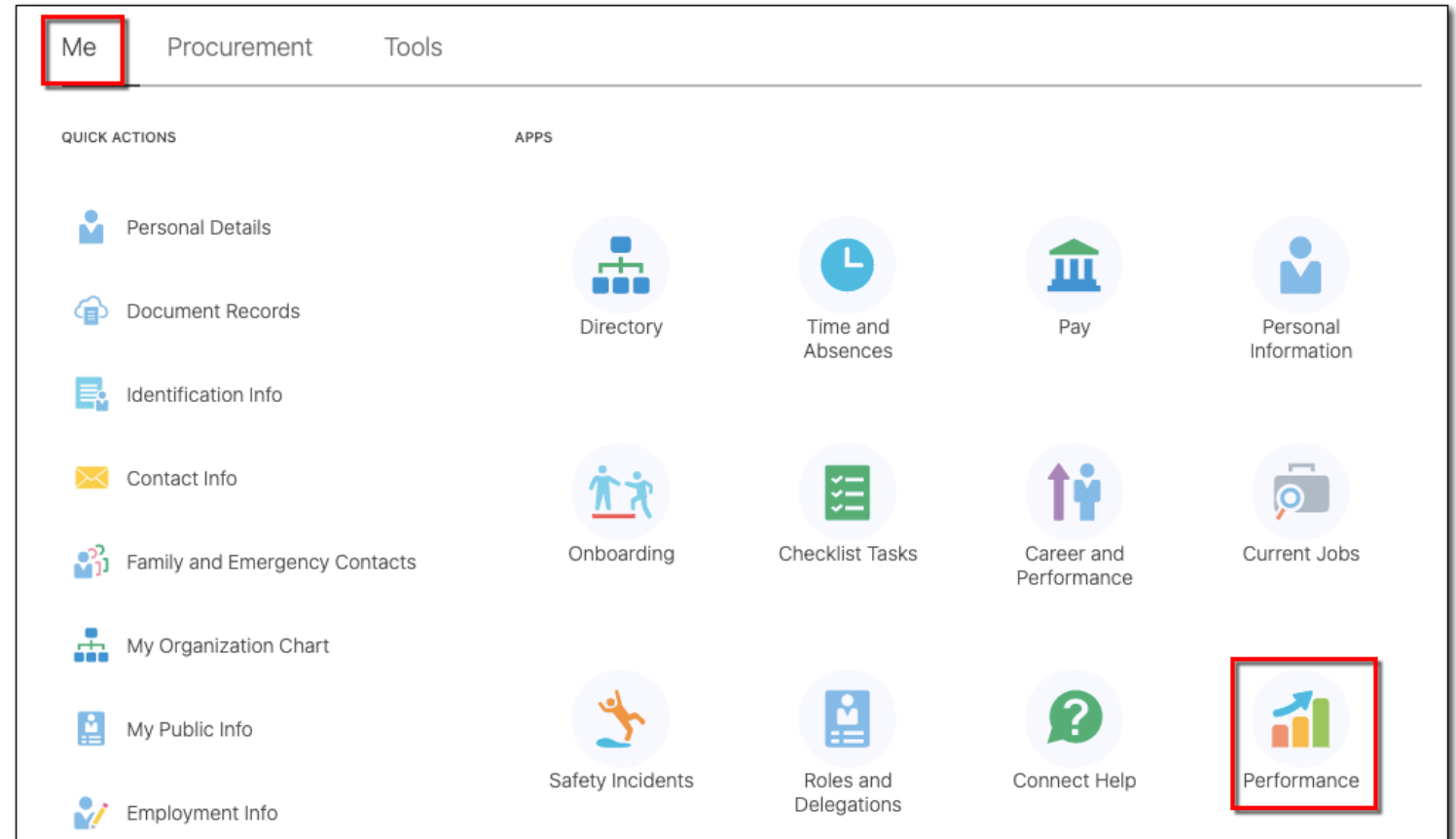
Tahoma 2 B I U [List Icons]

I have reviewed and acknowledge receipt of my Evaluation.

Note: After the employee reviews and acknowledges the Probation Evaluation in Connect, the Manager and Employee will meet in person to have a review meeting to go over the evaluation in more depth. Once this is done, the employee will share any remaining input through additional comments.

5. Employee adds final comments to evaluation after meeting with manager

1. Select **Me** to display your employee functions.
2. Click the **Performance** icon.



Note: Connect displays the current task to be completed and where you are in the overall evaluation process.

3. Click the **Probation Extension Evaluation** link.

Anytime Documents

+ Add ^

All

Probation Extension Evaluation

★★★★☆ | By [User]

...

Current Task

Staff Share input

Task Completion

3 / 5

All Tasks

- ✓ Manager Evaluation of Workers
- ✓ Manager Shares Performance Document
- ✓ Staff Reviews and Acknowledges Evaluation
- Staff Share input
- Manager Provides Final Feedback

4. If applicable, click the **View** button to review manager ratings and comments for **Competencies**.
5. When finished, click the **Continue** button.



Information

Review the performance document and continue to provide any final feedback comments on your evaluation.

Continue

Document Details

Evaluation Topics

Competencies

Manager Rating

★★★★☆ | Exceeds Standards

Manager Comments

Sample manager comments entered here.

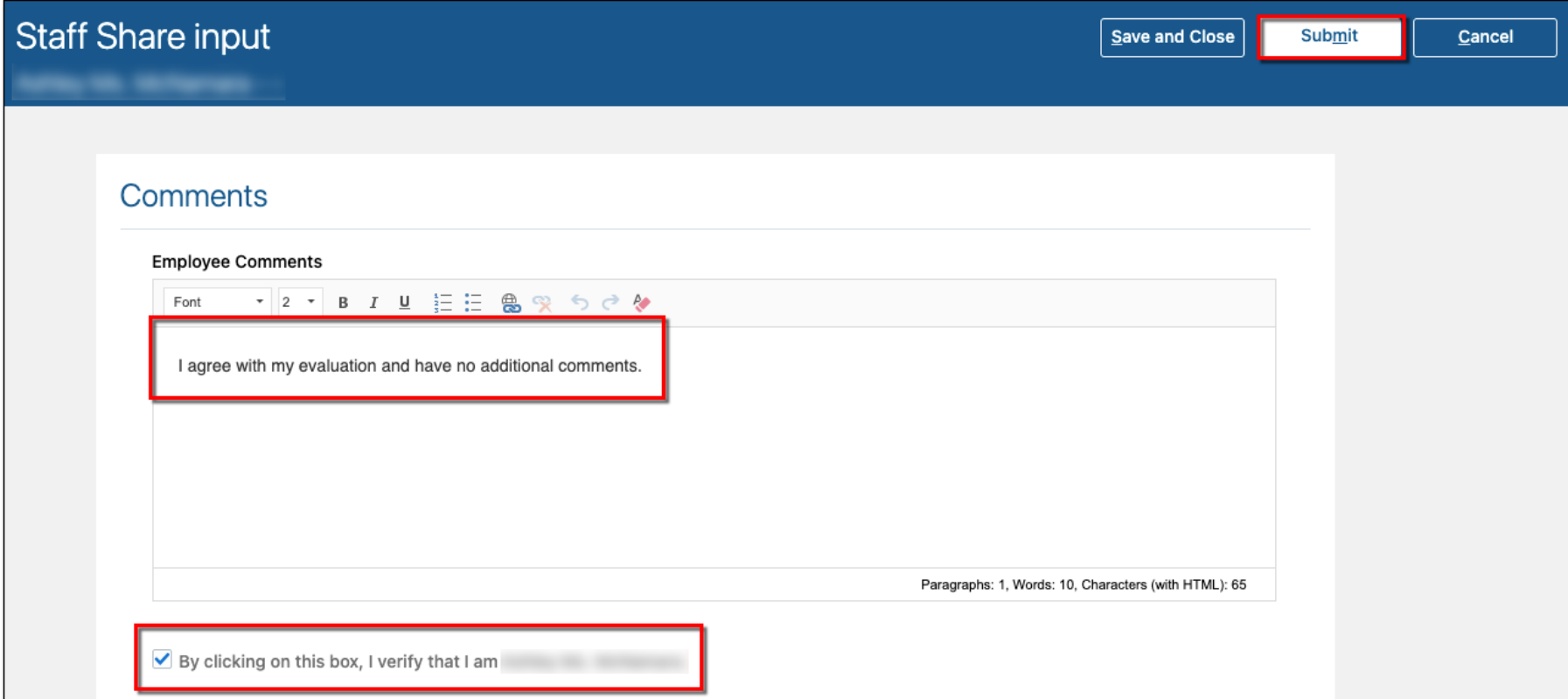
View

6. Enter your final **Comments** for the Probation Extension Evaluation.

7. Click the **checkbox** to verify you are the employee being evaluated.

Note: The **Submit** button will not become active until the checkbox is selected.

8. Click the **Submit** button.



The screenshot shows a web form titled "Staff Share input". At the top right are three buttons: "Save and Close", "Submit" (highlighted with a red box), and "Cancel". Below the title bar is a section titled "Comments". Inside this section is a sub-section titled "Employee Comments" which contains a rich text editor. The text editor has a toolbar with options for font, size, bold, italic, underline, list, link, unlink, undo, redo, and insert. The text "I agree with my evaluation and have no additional comments." is entered in the text area. Below the text area, a status bar shows "Paragraphs: 1, Words: 10, Characters (with HTML): 65". At the bottom of the form, there is a checkbox that is checked, with the text "By clicking on this box, I verify that I am" followed by a blurred area. This checkbox and its text are also highlighted with a red box.

Note: When finished, Connect will display the **Current Task**, number of **Tasks Completed**, and where you are in the overall process.

Note: This is the last step in the evaluation process for the employee. Updates to the evaluation can no longer be made by the employee.

Review Period
Annual Review Period

Anytime Documents
+ Add

All

Probation Extension Evaluation
★★★★☆ | By

Current Task
Manager Provides Final Feedback

Task Completion

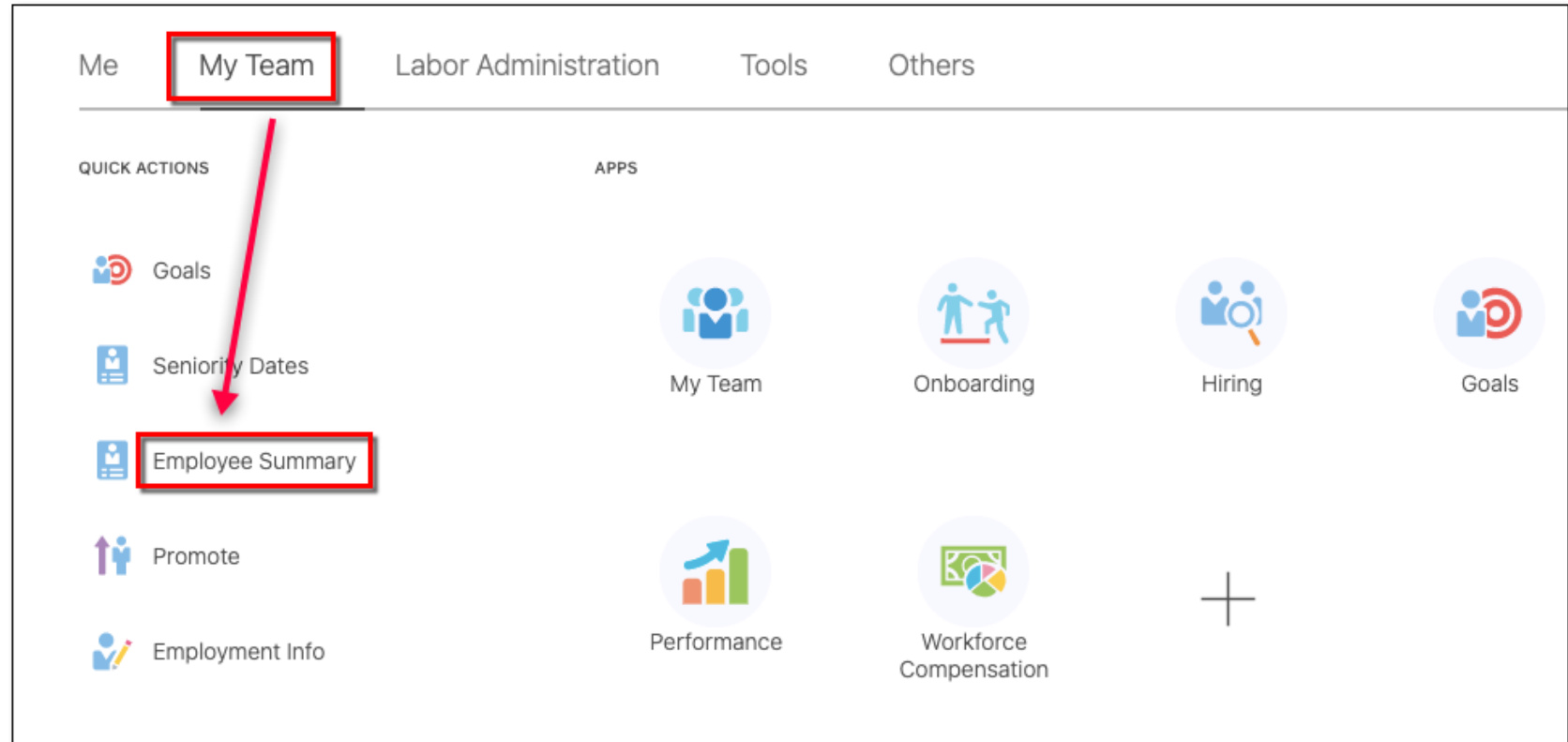
4 / 5

All Tasks

- ✓ Manager Evaluation of Workers
- ✓ Manager Shares Performance Document
- ✓ Staff Reviews and Acknowledges Evaluation
- ✓ Staff Share input
- ➔ Manager Provides Final Feedback

**6. Manager provides final comments
after employee provides their final
comments**

1. From the **My Team** tab, click the **Employee Summary** menu.



2. Select the **employee** for whom you will be adding final comments.

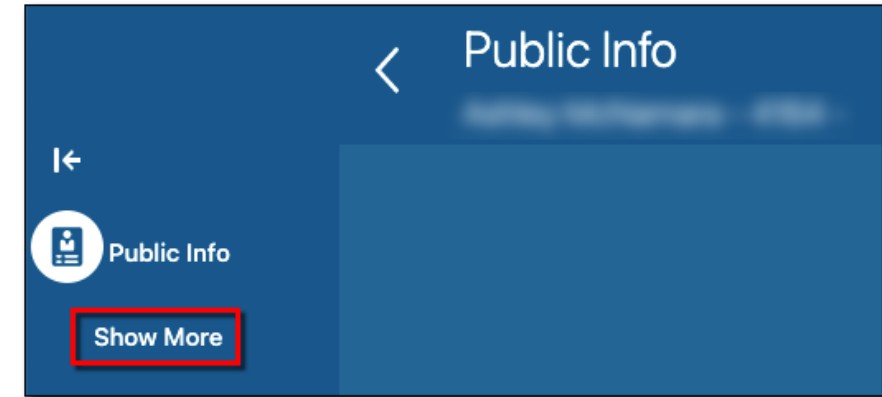
Employee Summary

Search for a Person

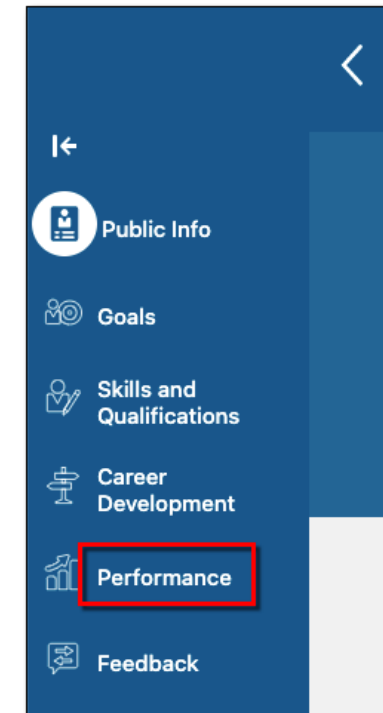
Direct Reports

	Employee Name Employee Title	Employee Email Employee Phone
	Employee Name Employee Title	Employee Email Employee Phone
	Employee Name Employee Title	Employee Email Employee Phone
	Employee Name Employee Title	Employee Email Employee Phone
	Employee Name Employee Title	Employee Email Employee Phone

3. Click the **Show More** menu.



4. Click the **Performance** menu.



5. Click the link for the **Probation Extension Evaluation** used in the previous steps.

Note: Connect displays the current task to be completed and where you are in the overall evaluation process.

Anytime Documents

+ Add

^

All

Probation Extension Evaluation

★★★★☆ | By

...

Current Task

Manager Provides Final Feedback

Task Completion

4 / 5

All Tasks

✓ Manager Evaluation of Workers

✓ Manager Shares Performance Document

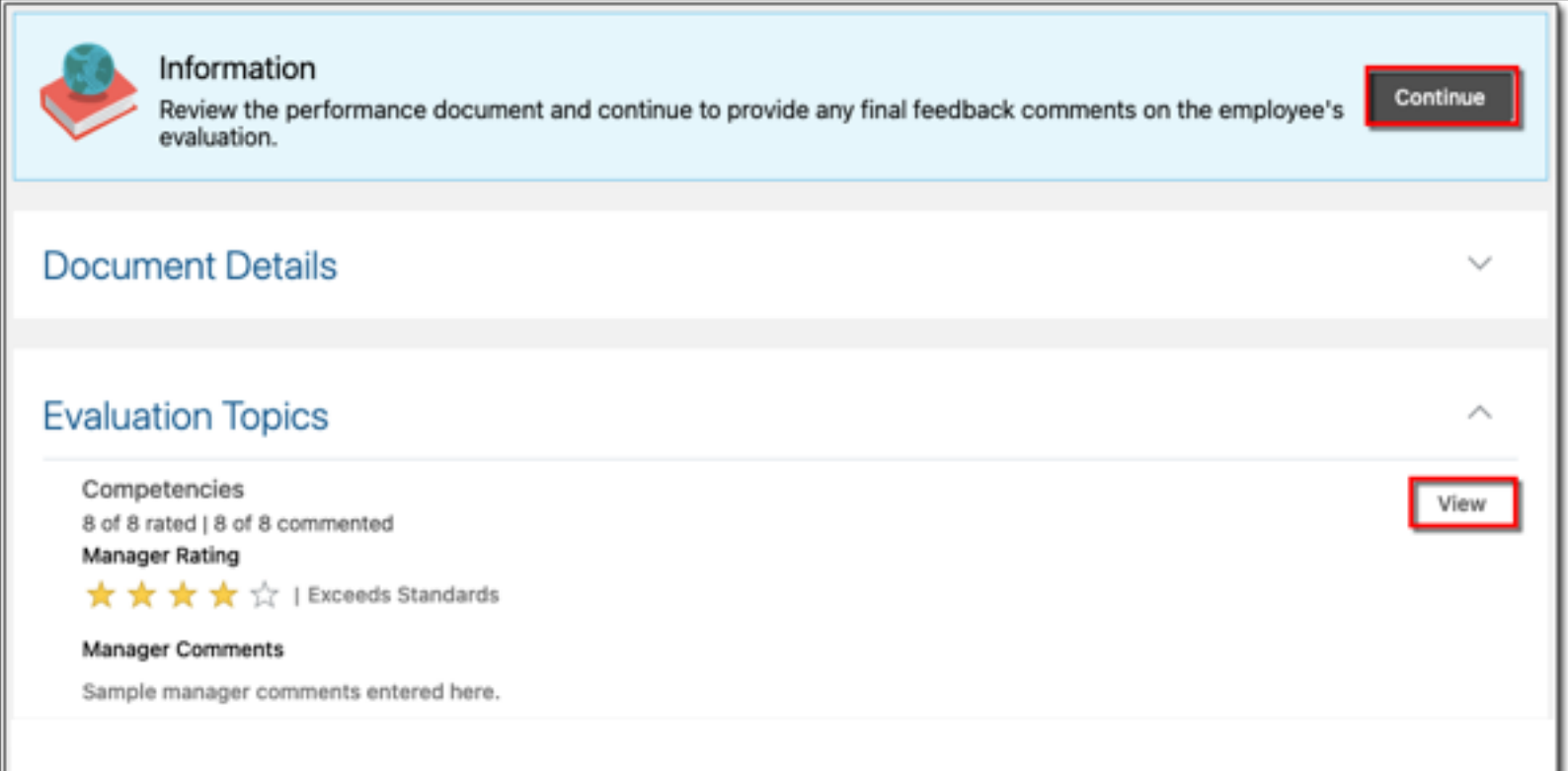
✓ Staff Reviews and Acknowledges Evaluation

✓ Staff Share input

➔ Manager Provides Final Feedback

6. Manager Provides Final Comments

6. If applicable, click the **View** button to review the Competencies.
7. When finished, click the **Continue** button.

The screenshot shows a web interface for a performance evaluation system. At the top, there's a light blue header bar with a globe icon on the left, the title 'Information' in the center, and a 'Continue' button on the right. Below the header, the main content area is divided into sections. The first section is 'Document Details', which is currently collapsed. The second section is 'Evaluation Topics', which is expanded. Under 'Evaluation Topics', there are three sub-sections: 'Competencies' (showing '8 of 8 rated | 8 of 8 commented'), 'Manager Rating' (showing four yellow stars and one grey star, with the text 'Exceeds Standards'), and 'Manager Comments' (showing a text input field with the placeholder 'Sample manager comments entered here.'). A 'View' button is located to the right of the 'Competencies' and 'Manager Rating' sub-sections.

6. Manager Provides Final Comments

8. Scroll to the bottom of the page to review the employee's **final comments**.

Final Feedback

Manager Comments

Employee Comments

I agree with my evaluation and have no additional comments.

✓ By clicking on this box, I verify that I am

9. Scroll to the top of the page and click the **Continue** button.



Information

Review the performance document and continue to provide any final feedback comments on the employee's evaluation.

Continue

Document Details

Evaluation Topics

Competencies

8 of 8 rated | 8 of 8 commented

Manager Rating

★★★★☆ | Exceeds Standards

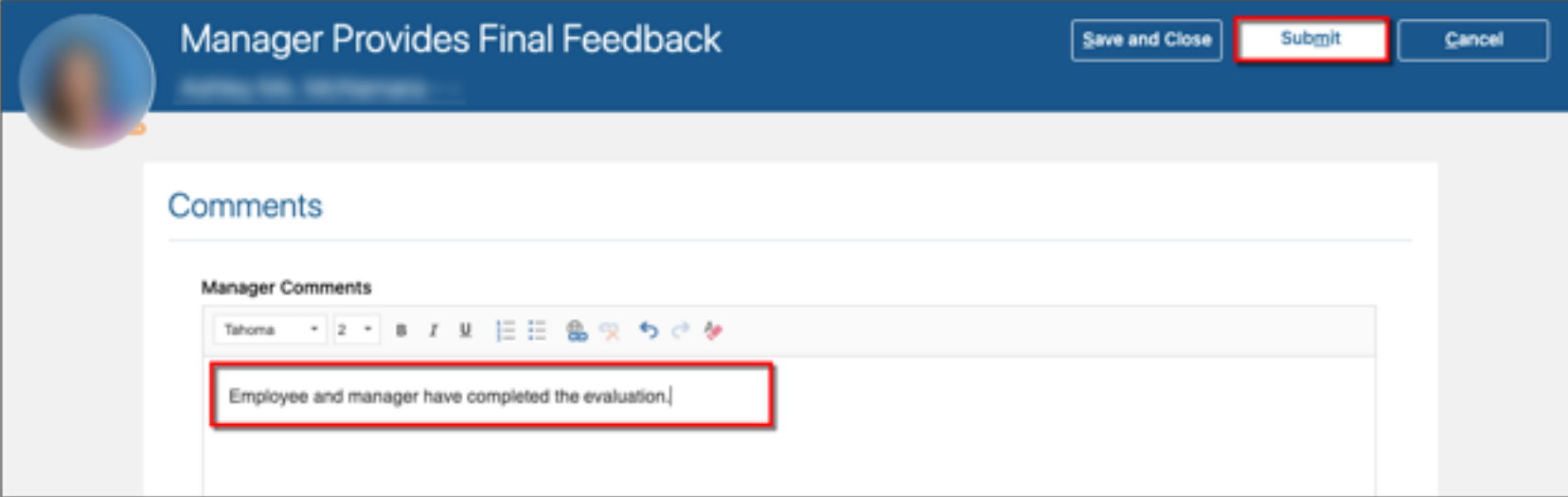
Manager Comments

Sample manager comments entered here.

10. Enter the final **Comments** for the employee's **Probation Extension Evaluation**.

11. Click the **Submit** button.

Note: This is the last step for the manager in the **Probation Extension Evaluation** process.

A screenshot of a web application interface titled 'Manager Provides Final Feedback'. The interface includes a header bar with a user profile picture, the title, and three buttons: 'Save and Close', 'Submit' (highlighted with a red border), and 'Cancel'. Below the header is a section titled 'Comments'. Under 'Comments' is a sub-section 'Manager Comments' which contains a text area with a rich text editor toolbar (including bold, italic, underline, bulleted list, numbered list, link, unlink, and undo buttons). The text area contains the text 'Employee and manager have completed the evaluation.', which is also highlighted with a red border.

Note: The status of the Probation Extension Evaluation displays **Completed**.

Note: To review the completed evaluation, simply click the **Probation Extension Evaluation** link.

End of Procedure.

Anytime Documents

+ Add ^

All v

Probation Extension Evaluation

Completed

★★★★☆ | By [REDACTED]

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