

Performance Management Onboarding Checklist

It is fundamental to develop, manage, and document performance expectations and conversations during the first 6 months of employment, and ongoing. Although Contract and Limited Employees do not serve a probationary period, it is equally important to have these conversations.

The following is a recommended timeline for managing your employee's performance during the first six months of employment.

First Week	<p>During the first week of employment, meet with employee to review and discuss the following:</p> <ul style="list-style-type: none"> ➤ Duties outlined on the Job Description (forward signed JD to hr@ucmerced.edu for employee's personnel file) ➤ Performance expectations and standards for performance, including goals or development objectives (e.g., University-specific training to be completed) ➤ Review and direct the employee to applicable University/Departmental policy(s), procedures or collective bargaining agreement associated with the employee's position. ➤ Discuss department-specific expectations or guidelines (examples below): <ul style="list-style-type: none"> ❖ Attendance ❖ Meals and Rest Periods ❖ Sick and Vacation Leave ❖ Appropriate Conduct (Refer to UCM's Core Competencies) ❖ Health & Safety Rules
Throughout First Three Months (and ongoing)	<ul style="list-style-type: none"> ➤ Review completed tasks, projects and assignments and provide feedback if any changes or improvements are needed; ➤ Make adjustments to goals and work priorities, if necessary; ➤ Recognize and reinforcing accomplishments; ➤ Coaching for improved performance/outcomes; ➤ Ongoing communication: does employee have the tools, resources, and training to carry out job duties successfully; ➤ For career appointments and some contract appointments, please utilize the 1:1 meeting feature in Halogen to conduct and document your check-in.
Mid-Probationary Assessment (3 Month Mark)	<ul style="list-style-type: none"> ➤ Mid-Probationary Assessment: formal check-in with employee to review and document (using the probationary assessment form) performance progress. If goals for the performance cycle have not been established, this is the time to identify. This is a critical step for merit-eligible employee, as goals play an important role in the overall performance rating. ➤ Probationary Assessment Form should be uploaded to the employee's 'Document' section in Halogen. <ul style="list-style-type: none"> ❖ Halogen accounts are not created for limited appointments. Please forward the completed assessment form to hr@ucmerced.edu for the employee's personnel file. ❖ Halogen accounts for contract appointments are created only if the term is 12mo or longer in duration. If not account available, please forward completed assessment form to hr@ucmerced.edu for the employee's personnel file.
5 Month Check-Point	<ul style="list-style-type: none"> ➤ Supervisor to make final determination regarding employee's continued employment status; ➤ Probation Period may be extended (under limited circumstances), please refer to applicable policy or labor agreement;

