

# Performance Improvement Plans (PIPs) Managers

As a manager, you may need to initiate a Performance Improvement Plan (PIP) for an employee. A PIP is a structured process that provides a set of goals and expectations to an employee who is not meeting performance standards. This process may help the employee improve their performance over a defined period of time. This document will guide you through the following tasks and processes:

## Initiating PIPs

How to initiate a PIP for an employee on your team

## Conducting a Progress Check

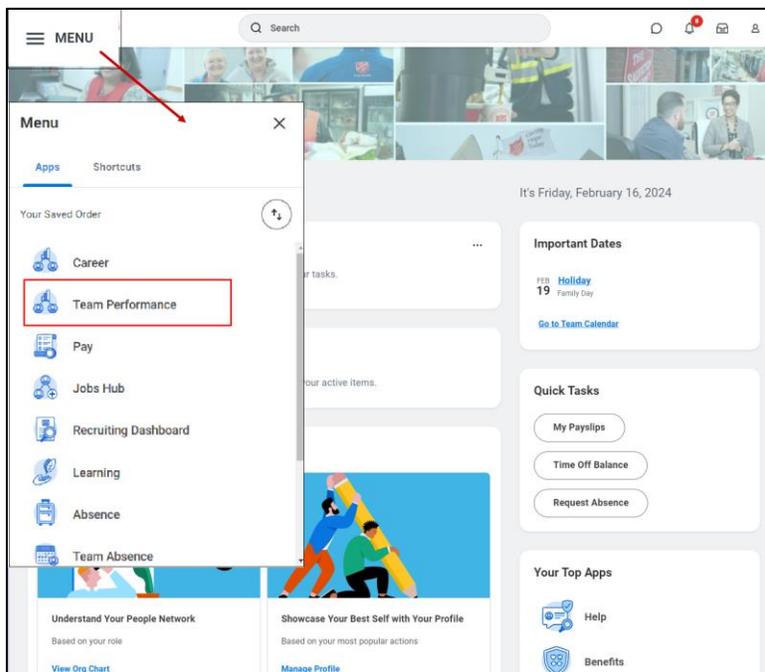
How to conduct a Progress Check to assess the employee's progress and make any adjustments to the PIP at any point(s) after the initial Performance Improvement Plan.

## Completing the Evaluation

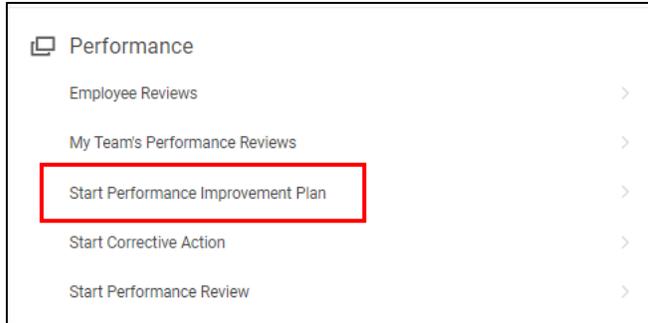
How to assess whether or not the employee has successfully met the expectations outlined in the plan once the defined date of the Performance Improvement Plan has been reached.

## Initiating PIPs

1. To get started, click the **Team Performance** application from the **Applications Menu** on your Workday Homepage.



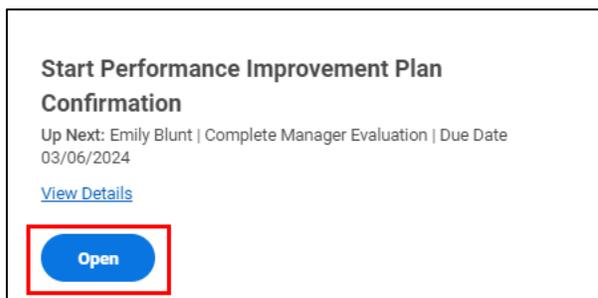
2. From the **Performance** column, click **Start Performance Improvement Plan**.



3. Fill in the mandatory fields, marked by a red asterisk (\*), Then, click **Submit**.
  - a. Select the **Employee** you would like to start the performance improvement plan for
  - b. Select **Initiate** from the **Review Template** drop-down menu.
  - c. Select today's date for the **Period Start Date**
  - d. Select today's date for the **Period End Date**

A screenshot of a form titled 'Start Performance Improvement Plan for Employee'. The form contains the following fields: 'Employee' (marked with a red asterisk and a red circle 'a'), 'Review Template' (marked with a red asterisk and a red circle 'b'), 'Period Start Date' (marked with a red asterisk and a red circle 'c'), and 'Period End Date' (marked with a red asterisk and a red circle 'd'). At the bottom of the form, there are two buttons: 'Submit' (highlighted with a red rectangular box) and 'Cancel'. A note at the top of the form says 'Please use Today's date for the Period Start and Period End dates.'

4. You will receive a notification. Click **Open** or navigate to your **Inbox** to **Complete the Manager Evaluation**.



5. Then, click **Get Started**.

**Complete Manager Evaluation** Manager Evaluation: Initiate: Performance Improvement Plan: Harry Potter

Review Period 02/28/2024 - 02/28/2024

Performance Improvement Plan (PIP) may be administered when employees are unable to demonstrate competency in a new role/position or as a process to correct work performance.

The steps in the process include:  
 Manager fills out the PIP form  
 HR Partner review/approval  
 Manager meets with Employee to discuss expectations  
 Employee Acknowledgement

**Get Started**

6. You will be brought to the **PIP Details** section of the Performance Improvement Plan. Scroll down to answer the questions, then click **Next** to continue.
  - a. **Performance Commentary:** Provide overall commentary of the employee's performance. State the role and high-level expectations/ responsibilities of the role that the employee is in, followed by 1-2 sentences stating where the employee may not be meeting these expectations.
  - b. **Specific Performance Concerns:** State 2 or 3 categories of performance concerns. Further provide at least 1 recent example of a task or situation where a performance expectation was not met to support each category or concern listed, including any negative impact to the department or business. Highlight any coaching that may have already been provided thus far.

Question **Performance Commentary:** Describe the performance or results that failed to meet expectations. **a**

Manager

Answer \*

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Question **Specific Performance Concerns:** Attach additional documentation if available. **b**

Manager

Answer \*



Please note that you can click on **Review Example PIP Here** at the top of the page for more support.

7. You will be brought to the **Duration** section of the Performance Improvement Plan. Here, **Select** a time frame (30 days, 60 days, 90 days, N/A), then **Answer** the corrective action the employee has been asked to take. Click **Next** to continue.

The screenshot shows a form titled "Manager" with a "Question" field containing the text "Corrective Action: Describe corrective action along with improvement time frame." Below this, there are two fields: "Select" and "Answer". The "Select" field is a dropdown menu with "select one" as the current selection. A dropdown menu is open, showing four options: "30 Days", "60 Days", "90 Days", and "N/A". The "Answer" field is a text area with a rich text editor toolbar above it, including options for "Format", "B" (bold), "I" (italic), "U" (underline), and "A" (text color).



Please note that corrective action categories typically mirror the areas highlighted as part of performance concerns. Include any metrics, deadlines or milestones that you expect the employee to achieve during the PIP period.

8. You will be brought to the **Supporting Documents** section of the Performance Improvement Plan. Here, you can choose to click **Select Files** to upload any documents here that might support the PIP action. Documents included here will be visible to the employee. Click **Next** to continue.

The screenshot shows a form titled "Manager" with a large dashed box containing the text "Drop files here" and "or" below it. Below the dashed box is a button labeled "Select files", which is highlighted with a red rectangular border.

9. Next, you can read through the **Employee Acknowledgement** statement, which will show you what the employee will have to sign upon receiving the PIP. Click **Next** to continue.

### Employee Acknowledgement

**Question** **Employee Acknowledgement**  
 I have received a copy of this notification. It has been discussed with me, and I have been advised to take time to consider it before I sign it. I have freely chosen to agree to it, and I accept full responsibility for my actions. By signing this, I commit to follow the Medline's standards of performance and conduct.

**At-Will Disclaimer**  
 Medline Industries, LP is an "at-will" employer, meaning that your employment has no specified term and that the employment relationship may be terminated any time at the will of either party on notice to the other. Medline is opting to provide you with corrective action measures, and can terminate such corrective measures at any time, solely at its own discretion, and that the use of progressive corrective action will not change your at-will employment status.

Our **Employee Assistance Program (EAP)** Provider, ComPsych GuidanceResources, can be confidentially reached to assist you at 1-844-850-0281 or [guidanceresources.com](http://guidanceresources.com). This is strictly voluntary. A booklet regarding the EAP's services is available from Human Resources.

10. The **Review and Submit** page will provide an overview of the information you entered. Review it carefully and make any necessary corrections. To go back, click on a section in the left sidebar. Then, click **Submit** to advance to the next step.

#### Complete Manager Evaluation

Manager Evaluation: Initiate:  
Performance Improvement  
Plan: Harry Potter

Actions

02/28/2024 - 02/28/2024

- PIP Details
- Duration
- Supporting Documents
- Employee Acknowledgement
- Review and Submit

#### PIP Details

✕ PDF

**Question** **Performance Commentary:** Describe the performance or results that failed to meet expectations.

#### Manager

**Answer** Harry, in your role as an Associate Product Manager you are responsible for managing product sourcing projects and working with sales to profitably grow our business. Effective product management requires quick responses and turn-around to complete projects and initiatives on time. It also requires a great deal of organization and attention to detail to prevent delays or mistakes.

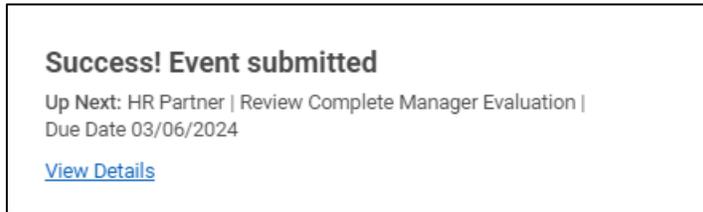
Unfortunately, you are not meeting expectations in several critical areas which has caused work to remain unaddressed, be delayed, and/or needing management involvement to complete. Over the past two months you have been coached on the tasks assigned to you; however, you have not demonstrated sustained improvement and are being placed on a Performance Improvement Plan effective immediately.

As previously outlined in our last 1:1 meeting on April 26, we need to see improvement in your responsiveness, attention to detail, and organization. Below are examples from the past 30 days that highlight concerns we still have in these three key areas.

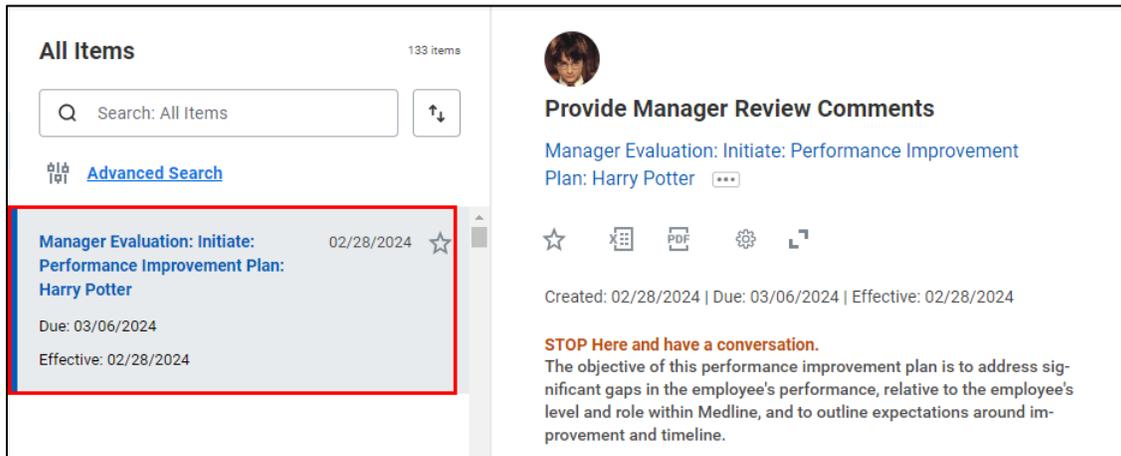
**Submit**

Save for Later

11. You will receive a confirmation notification. The task will then be routed to the HR Partner who will review your PIP submission.

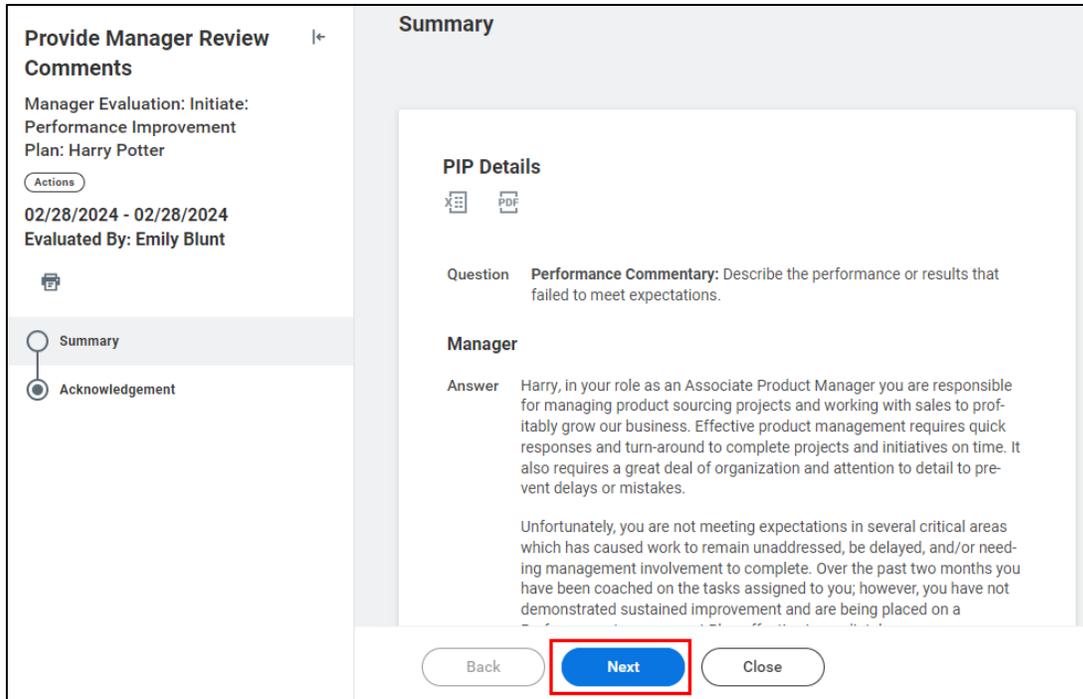


12. Once the HR Partner have approved your PIP submission, you will receive a task in your **My Tasks Inbox** to meet with the employee to discuss their Performance Improvement Plan.

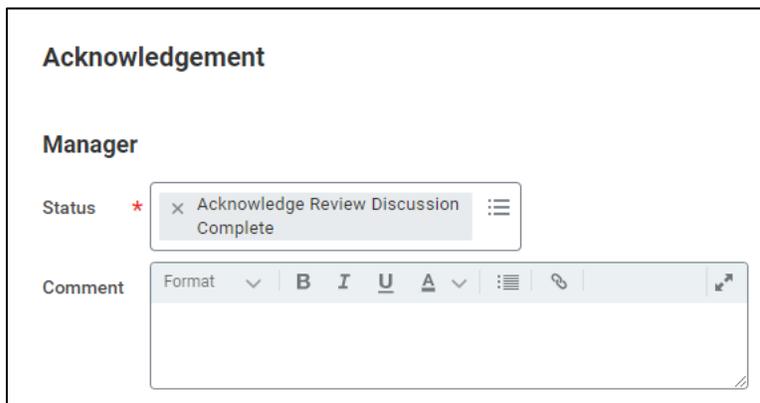


 Please note: **Do not click "Submit"** until the meeting with the colleague has occurred as it will route the task to the colleague within Workday for acknowledgement.

13. Click **Get Started** for a summary of the PIP, which you can reference during your discussion with the employee. Then, click **Next**.



14. When the conversation has been completed, select **Acknowledge Review Discussion Complete** in the **Status** and add any additional comments as necessary. The



15. Once complete, click **Submit**.



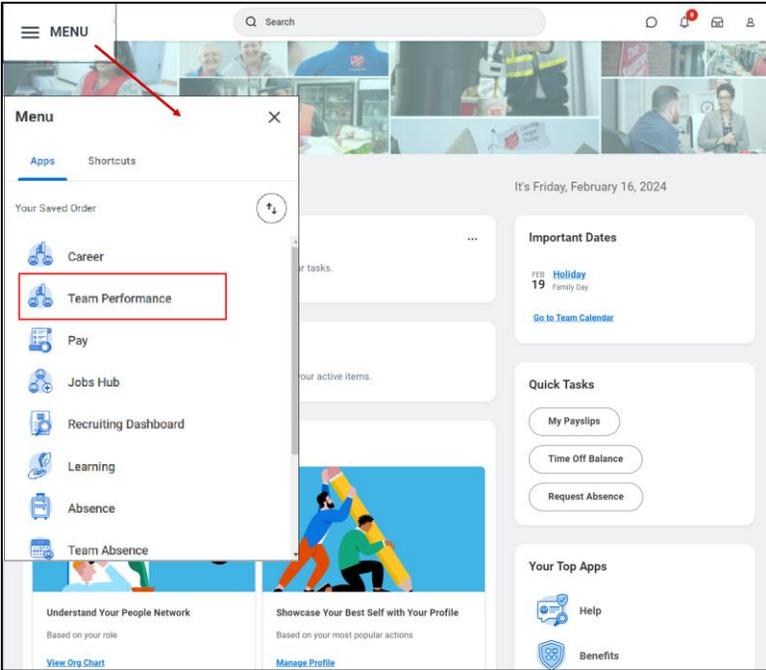
16. You will receive a confirmation notification. The task will then be routed to the employee for their acknowledgement of the PIP.

**Success! Event submitted**  
Up Next: Harry Potter | Provide Employee Review Comments |  
Due Date 03/06/2024  
[View Details](#)

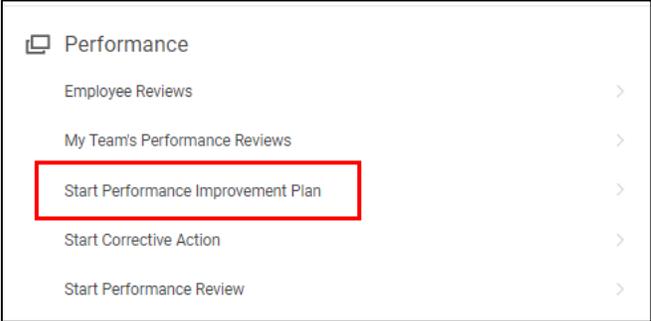
**Conducting a Progress Check**

At any point(s) after the initial Performance Improvement Plan, you may want to conduct a Progress Check. This allows you to assess the employee's progress and make any adjustments to the plan.

- 1. To track an employee's progress who is currently on a Performance Improvement Plan, click the **Team Performance** application from the **Applications Menu** on your Workday Homepage.



- 2. From the **Performance** column, click **Start Performance Improvement Plan**.



3. Fill in the mandatory fields, marked by a red asterisk (\*), Then, click **Submit**.
  - a. Select the **Employee** who is currently on a PI.
  - b. Select **Progress Check** from the **Review Template** drop-down menu.
  - c. Select today's date for the **Period Start Date**. This should not be the same as the day the PIP was initiated.
  - d. Select today's date for the **Period End Date**. This should not be the same as the day the PIP was initiated.

**Start Performance Improvement Plan for Employee**

Please use **Today's date** for the Period Start and Period End dates.

Employee \*  a

Review Template \*  b

Period Start Date \*  c

Period End Date \*  d

4. You will receive a notification to begin the Progress Check process. Click **Open** or select the task in your Workday **My Tasks Inbox** titled **Manager Evaluation: Progress Check**.

**Start Performance Improvement Plan Confirmation**

Up Next: Emily Blunt | Complete Manager Evaluation | Due Date 03/06/2024

[View Details](#)

5. Then, click **Get Started**.

**Complete Manager Evaluation**

Manager Evaluation: Progress Check: Harry Potter ...

Created: 02/28/2024 | Due: 03/06/2024 | Effective: 03/20/2024

Now it's time to check in on the employee's progress towards improvement in the areas previously identified on the initial PIP. Please meet with the employee to discuss their progress and document it here. You can launch a new progress check for each check in meeting and your comments from the previous discussion will be carried forward.

The steps in the process include:  
Manager fills out the Progress Check form  
Manager meets with Employee to discuss progress and expectations  
Employee Acknowledgement

**Get Started**

6. On the **PIP Details** page, you will find that the details entered during the PIP Initiation will automatically populate for the employee. Scroll to the bottom of the page and provide a **description of the progress the employee is making towards improvement** in the blank field. Then, click **Next** to continue.

**Question** Describe the progress the employee is making towards improvement.

**Manager**

**Answer \***

Format | B | I | U | A | [List Icon]

7. Skip ahead to the **PIP Status** page. Choose a **Rating** from the drop-down list, indicating the current progress of the employee. For a progress check, you will likely want to select either **PIP Open – Continue Coaching** or **PIP Extension**. If needed, you can add any comments. Then, click **Next** to proceed.

**PIP Status**

Please select the overall status of the PIP from the drop down list.

Manager

**Rating** \* select one

Comment

Format | B | I | U

PIP Open – Continue Coaching

PIP Closed – Successful

PIP Closed – Unsuccessful; incl comments on Status

PIP Extension

- On the next page, if the PIP is being extended, indicate the length of the extension by selecting the appropriate option from the drop-down menu under **Select**. Then, add any comments as necessary. Click **Next** to proceed.

**PIP Extension Details**

Question If the PIP is being extended, please indicate the length of the extension.

Manager

**Select** select one

Answer

Format | B | I | U

30 Days

60 Days

90 Days

N/A

- Once you have finished, proceed to the **Review and Submit** page. Take the time to carefully review all the information entered. If you need to make any revisions, click on the corresponding section in the left sidebar of the page. Then, click **Submit** to finalize your entry.

**Complete Manager Evaluation**

Manager Evaluation: Progress Check: Harry Potter

Actions

03/20/2024 - 03/20/2024

- PIP Details
- Duration
- Supporting Documents
- PIP Status
- PIP Extension Details
- Employee Acknowledgement
- Review and Submit

**PIP Details**

Question

**Performance Commentary:** Describe the performance or results that failed to meet expectations.

**Manager**

Answer

Harry, in your role as an Associate Product Manager you are responsible for managing product sourcing projects and working with sales to profitably grow our business. Effective product management requires quick responses and turn-around to complete projects and initiatives on time. It also requires a great deal of organization and attention to detail to prevent delays or mistakes.

Unfortunately, you are not meeting expectations in several critical areas which has caused work to remain unaddressed, be delayed, and/or needing management involvement to complete. Over the past two months you have been coached on the tasks assigned to you; however,

**Submit** Save for Later

10. You will receive a task in your Workday **My Tasks Inbox** titled **Manager Evaluation: Progress Check**. This will remind you to set up a meeting with the employee.

**All Items** 132 items

Search: All Items

[Advanced Search](#)

**Manager Evaluation: Progress Check: Harry Potter** 02/28/2024 ☆

Due: 03/06/2024  
Effective: 03/20/2024

**Provide Manager Review Comments**

Manager Evaluation: Progress Check: Harry Potter

Created: 02/28/2024 | Due: 03/06/2024 | Effective: 03/20/2024

**STOP Here and have a conversation.**  
The progress of the PIP will be reviewed on an ongoing basis through the "Progress Check Form" to evaluate if improvement is being made at a reasonable rate. If determined that sufficient progress is not being made or sustained, further actions up to and including termination of employment may be taken at any time. The eligibility for performance based compensation, such as bonus and merit increase, may be impacted as a result of this PIP.

**IMPORTANT NOTE:** Do not hit "Submit" until the meeting with the colleague has occurred. Instead, choose "Save for Later". "Submit" will route the form to the colleague within Workday.

**Get Started**



Please note: **Do not click "Submit"** until the meeting with the colleague has occurred as it will route the task to the colleague within Workday for acknowledgement.

11. Click **Get Started** for a summary of the PIP, which you can reference during your discussion with the employee. Then, click **Next**.

**Provide Manager Review Comments**

Manager Evaluation: Progress  
Check: Harry Potter

Actions

03/20/2024 - 03/20/2024  
Evaluated By: Emily Blunt

Summary

Acknowledgement

### Summary

#### PIP Details

Question

**Performance Commentary:** Describe the performance or results that failed to meet expectations.

#### Manager

Answer

Harry, in your role as an Associate Product Manager you are responsible for managing product sourcing projects and working with sales to profitably grow our business. Effective product management requires quick responses and turn-around to complete projects and initiatives on time. It also requires a great deal of organization and attention to detail to prevent delays or mistakes.

Unfortunately, you are not meeting expectations in several critical areas which has caused work to remain unaddressed, be delayed, and/or

Back **Next** Close

12. When the conversation has been completed, select **Acknowledge Review Discussion Complete** in the **Status** section and add any additional comments as necessary.

### Acknowledgement

#### Manager

Status \* × Acknowledge Review Discussion Complete

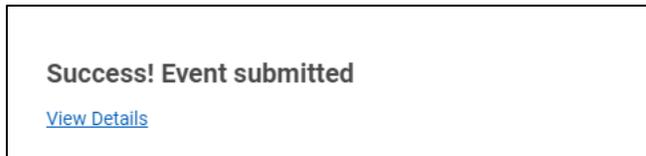
Comment

Format **B** **I** **U** **A** **☰** **🔗** **📎**

13. Once complete, click **Submit**.



14. You will receive a confirmation notification that the progress check has been submitted.



## Completing the Evaluation

1. Follow **Steps 1 – 6** from the section above, **Conducting a Progress Check**.

On **Step 7, PIP Status**, you will want to choose either **PIP Closed – Successful** or **PIP Closed – Unsuccessful** under the **Rating** drop-down list. If you chose **Unsuccessful**, please include a rationale in the comment section below. Click **Next** to proceed.

A screenshot of the 'PIP Status' form. The title is 'PIP Status'. Below it is the instruction 'Please select the overall status of the PIP from the drop down list.' followed by a dropdown arrow. Under the 'Manager' section, there is a 'Rating' field with a red box around it and a red asterisk. The dropdown menu is open, showing options: 'PIP Open – Continue Coaching', 'PIP Closed – Successful' (highlighted with a red box), 'PIP Closed – Unsuccessful; incl comments on Status', and 'PIP Extension'. Below the rating is a 'Comment' field with a rich text editor toolbar (Format, Bold, Italic, Underline) and a text area.

2. Once you have finished, proceed to the **Review and Submit** page. Take the time to carefully review all the information entered. If you need to make any revisions, click on the corresponding section in the left sidebar of the page. Then, click **Submit** to finalize your entry.

### Complete Manager Evaluation

Manager Evaluation: Progress Check: Harry Potter

Actions

03/20/2024 - 03/20/2024

- PIP Details
- Duration
- Supporting Documents
- PIP Status
- PIP Extension Details
- Employee Acknowledgement
- Review and Submit

#### PIP Details

Question

**Performance Commentary:** Describe the performance or results that failed to meet expectations.

#### Manager

Answer

Harry, in your role as an Associate Product Manager you are responsible for managing product sourcing projects and working with sales to profitably grow our business. Effective product management requires quick responses and turn-around to complete projects and initiatives on time. It also requires a great deal of organization and attention to detail to prevent delays or mistakes.

Unfortunately, you are not meeting expectations in several critical areas which has caused work to remain unaddressed, be delayed, and/or needing management involvement to complete. Over the past two months you have been coached on the tasks assigned to you; however,

Submit Save for Later

- You will receive a confirmation notification if successfully completed. The task will then be routed to the HR Partner to review the evaluation.

### Success! Event submitted

Up Next: HR Partner | Review Complete Manager Evaluation |  
Due Date 03/06/2024

[View Details](#)

- Once they have approved, you will receive a task in your Workday **My Tasks Inbox** titled **Manager Evaluation: Progress Check**. This will remind you to set up a meeting with the employee.

**All Items** 132 items

Search: All Items

**Manager Evaluation: Progress Check: Harry Potter** 02/28/2024 ☆

Due: 03/06/2024  
Effective: 03/20/2024

**Provide Manager Review Comments**

Manager Evaluation: Progress Check: Harry Potter

Created: 02/28/2024 | Due: 03/06/2024 | Effective: 03/20/2024

**STOP Here and have a conversation.**  
The progress of the PIP will be reviewed on an ongoing basis through the "Progress Check Form" to evaluate if improvement is being made at a reasonable rate. If determined that sufficient progress is not being made or sustained, further actions up to and including termination of employment may be taken at any time. The eligibility for performance based compensation, such as bonus and merit increase, may be impacted as a result of this PIP.

**IMPORTANT NOTE:** Do not hit "Submit" until the meeting with the colleague has occurred. Instead, choose "Save for Later". "Submit" will route the form to the colleague within Workday.

**Get Started**



Please note: **Do not click "Submit"** until the meeting with the colleague has occurred as it will route the task to the colleague within Workday for acknowledgement.

- Click **Get Started** for a summary of the PIP, which you can reference during your discussion with the employee. Then, click **Next**.

**Provide Manager Review Comments**

Manager Evaluation: Progress Check: Harry Potter

03/20/2024 - 03/20/2024  
Evaluated By: Emily Blunt

Summary

Acknowledgement

**Summary**

**PIP Details**

Question

**Performance Commentary:** Describe the performance or results that failed to meet expectations.

**Manager**

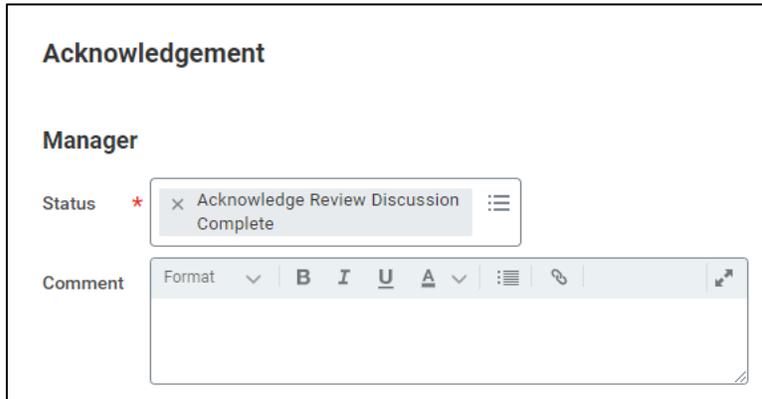
Answer

Harry, in your role as an Associate Product Manager you are responsible for managing product sourcing projects and working with sales to profitably grow our business. Effective product management requires quick responses and turn-around to complete projects and initiatives on time. It also requires a great deal of organization and attention to detail to prevent delays or mistakes.

Unfortunately, you are not meeting expectations in several critical areas which has caused work to remain unaddressed, be delayed, and/or

Back **Next** Close

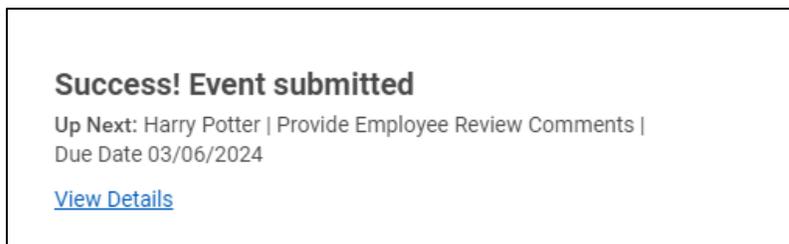
- When the conversation has been completed, select **Acknowledge Review Discussion Complete** in the **Status** section and add any additional comments as necessary.



- Once complete, click **Submit**.



- You will receive a confirmation notification that the progress check has been submitted. The task will then be routed to the employee for their acknowledgement of the PIP completion conversation.



Please note that employees in Mexico will not receive an employee acknowledgment task. Managers are required to print out the PIP using the **Printer** icon in the left sidebar of **Step 5** and receive the employee's signature on the printout in the appropriate section.