

Performance Improvement Plans (PIPs)

HR



Approving Manager Evaluation

The HR Partner is the first person responsible for reviewing and approving the submission when the Performance Improvement Plan (PIP) is initiated by Manager or nearing its defined completion date.

1. When a Manager initiates a PIP for an employee on their team, the HR Partner will be the first to review the submission. You will receive a task in your Workday **My Tasks Inbox**. Select the task titled **Manager Evaluation: Initiate Performance Improvement Plan**, then click **Get Started** on the right-hand side of the page.

Commented [a1]: See feedback provided in [D1_Medline_PIPs ORG_HR_031124.docx \(sharepoint.com\)](#)

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Manager Evaluation: Initiate: Performance Improvement Plan: Harry Potter 02/28/2024 ☆

Due: 03/06/2024
Effective: 02/28/2024

Review Complete Manager Evaluation

Manager Evaluation: Initiate: Performance Improvement Plan: Harry Potter

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

2. You will be directed to the **PIP Details** page. Read through the submitted answers, then click **Next**.
 - a. **Performance Commentary:** Ensure the Manager provides overall commentary of the employee's performance, stating the role and high-level expectations / responsibilities of the role that the employee is in, followed by 1-2 sentences indicating where the employee may not be meeting these expectations.
 - b. **Specific Performance Concerns:** Ensure the Manager has stated 2 or 3 categories of performance concerns, providing at least 1 recent example of a task or situation where a performance expectation was not met to support each category or concern listed. Also ensure they have included any negative impact to the department or business and have highlighted 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 ***** Format B I U A 🔗 📎

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.

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

Manager

Answer ***** Format B I U A 🔗 📎

It is imperative price discrepancies between PO prices and vendor pricing are addressed and cleared up immediately. On 5/12 we were notified of Vendor A price discrepancies. The discrepancies were due to you inputting vendor pricing based on a % increase vs. what the vendor provided. I asked you to correct the errors and respond same day. On 5/23, 11 days later, domestic pricing reached out to us since they had not received a response from you. This held up POs to Vendor A and delayed getting product we critically needed.



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

3. You will be brought to the **Duration** section of the Performance Improvement Plan. Ensure the Manager has described the corrective action the employee has been asked to take. Click **Next** to continue.

Question Corrective Action: Describe corrective action along with improvement time frame.

Manager

Select ***** 90 Days

Answer ***** Format B I U A 🔗 📎

Over the next couple of months we need to see improvements in your responsiveness, attention to detail, and organization.

- It is expected that emails from and deliverables due to myself, pricing and sales are addressed within 24 hours.
- We need to see an improved sense of urgency around impactful business objectives. An improvement to attention to detail is going to be essential in your role moving forward.




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.

4. You will be directed to the **Supporting Documents** page of the Performance Improvement Plan. Ensure documents are relevant and support the PIP action plan. Click **Next** to continue.

Supporting Documents

Upload any documents here that might support the PIP action. Documents included here WILL be visible to the employee.

Manager

 **Performance Expectations.pdf**
Uploaded by Emily Blunt

12 minutes ago

Upload Date 02/28/2024 10:59 AM

Comment

Upload

5. 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. This is strictly voluntary. A booklet regarding the EAP's services is available from Human Resources.

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

Review Complete Manager Evaluation

Manager Evaluation: Initiate:
Performance Improvement
Plan: Harry Potter

02/28/2024 - 02/28/2024
Evaluated By: Emily Blunt

- PIP Details
- Duration
- Supporting Documents
- 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.

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As previously outlined in our last 1:1 meeting on April 26, we need to see

Approve Send Back ...



Please note that if you choose to **Send Back** the task, you will be required to provide a reason to the Manager. The Manager will need to submit the task again for your approval.

- If you approved the PIP submission, you will receive a confirmation notification. The task will be routed to the Legal Partner for their approval.

Success! Event approved

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

[View Details](#)



Please note that you will need to repeat the process of approvals for the same Manager once the defined completion date has been reached.