# Corrective Actions
Managers

For Managers looking to initiate a corrective action for one of their employees, this document will guide you through the following tasks and processes:

**Initiating a Corrective Action**
How to start the corrective action process within Workday and what information is required.

**Monitoring a Corrective Action**
How to view the status of a corrective action for one of your employees.

## Initiating a Corrective Action

As a Manager, you are able to initiate **Corrective Actions** in Workday. **Corrective Actions** are used for policy violations, inappropriate behaviors or specific performance deficiencies such as inaccuracies/ errors. **Performance Improvement Plans (PIPs)** are used when providing a set of goals to an employee so they may improve performance over a defined period of time. Please each out to your HR Representative to confirm what steps you should take based on the situation.

To get started, click on the **Menu** icon in the top left-hand corner of your Workday Homepage. Then, select the **Team Performance** application.
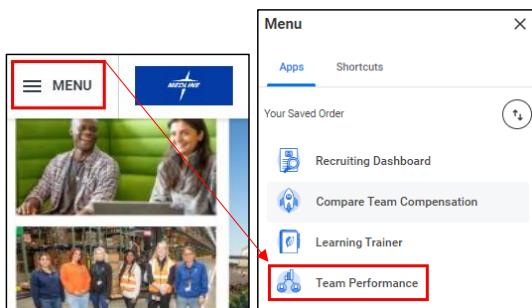
1. From the **Performance** menu on the right-hand side of the screen, select **Start Corrective Action**.
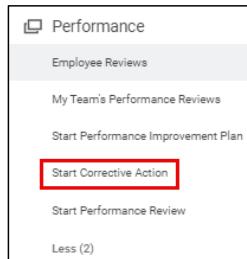


2. Next, fill out the details of the corrective action:



   a. Enter the name of the **Employee** who is receiving the corrective action.
   b. From the **Review Template** drop-down menu, select **Corrective Action** then **Corrective Action Plan**.
   c. From the **Corrective Action Reasons** drop-down menu, select **Reasons for Employee's Country**, then the employee's country, then the applicable reason and sub-reason for the corrective action:

| Reason | Sub-reason |
|---|---|
| Attendance | • Attendance<br>• No Call/No Show |
| Conduct | • Dishonest Act<br>• Insubordination<br>• Misconduct |
| Performance | • Unsatisfactory Performance |
| Policy Violation | • Violation of Company Policy<br>• Violation of Drug/Alcohol Policy |

> 💡 Please note that the list of **Corrective Action Reasons** will differ for employees in Mexico.

    **d.** Enter today's date for the **Period Start Date**.
    **e.** Enter today's date for the **Period End Date**.

> 💡 Please note that if the employee has undergone prior corrective actions, they will be listed in the **Related Corrective Actions** field. If the current corrective action has been an ongoing issue, it can be linked to a prior corrective action by selecting it here.

**3.** Click **Submit** when you have entered all the details of the corrective action.

**Start Corrective Action for Employee** ×

Use Corrective Action for policy violations, inappropriate behaviors or specific performance deficiencies such as inaccuracies/ errors.
Use a Performance Improvement Plan (PIP) when providing a set of goals to an employee so they may improve performance over a defined period of time.

Reach out to your HR Representative to confirm what steps you should take based on the situation.

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

| Employee | * | × Adam Driver ··· |
| Review Template | * | × Corrective Action Plan |
| Corrective Action Reasons | * | × Attendance (United States of America) |
| Related Corrective Actions | | |
| Period Start Date | * | 04/09/2024 |
| Period End Date | * | 04/09/2024 |

Cancel    **Submit**

**4.** You will receive a task titled "Manager Evaluation: Corrective Action Plan" in your **My Tasks Inbox**. Click the task to open its details on the right-hand side of the screen.

**5.** Click **Get Started**.



**6.** You will be guided through the steps that are listed on the left-hand side of the screen. Click **Next** to begin.
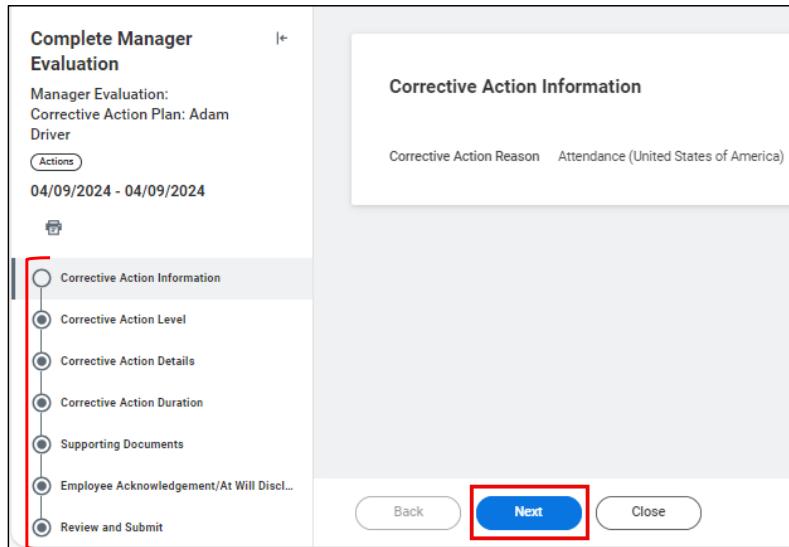
**7.** Select the **Corrective Action Level** (**Coach & Counsel**, **Written Warning** or **Final Written Warning**). Then, click **Next**.

Note that only **Written Warning** and **Final Written Warning** levels will trigger an employee acknowledgement step at the end of the corrective action process.

8. Enter the **Corrective Action Details** in the a. and b. **Answer** fields. Then, click **Next**.

a. Enter the **Incident Description** and **Supporting Details:** Include time, place, date of occurrence, and persons present as well as organizational impact.

b. Enter the **Expected Behavior**: Describe the measurable/tangible improvement expectations.

9. Enter the **Corrective Action Duration** (**6 months, 12 months, Permanent, Not Applicable** or **Other**). Then, click **Next**.



10. Upload any **Supporting Documents** by either clicking **Select files** then selecting the applicable file, or by dragging and dropping the applicable file into the grey box.
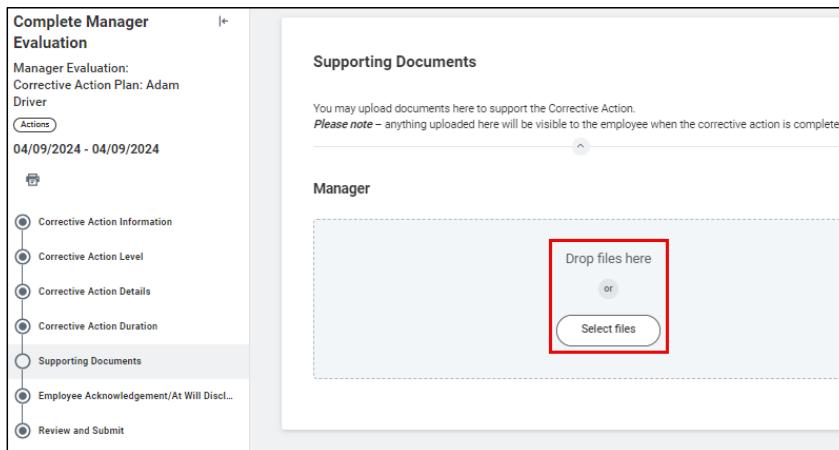
> 💡 Please note that any documents uploaded here will be visible to the employee at the end of the corrective action process.

**11.** Once the file is uploaded you can leave a supporting **Comment** if you wish. When you are done, click **Next**.
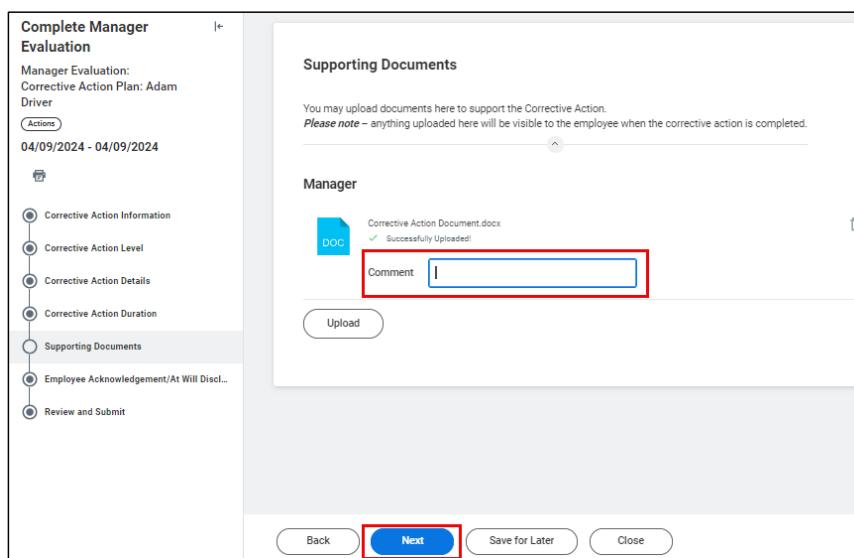
**12.** The **Employee Acknowledgement and At-will Disclaimer** will appear on the following screen. This is what the employee will see at the end of the corrective action process. There is no action needed from you on this step. Click **Next**.



**13.** Review the corrective action information you have just entered, then click **Submit**.

**14.** Next, an HR Partner will review and approve your evaluation. Once that happens, you will receive a task titled "Manager Evaluation: Corrective Action Plan" in your **My Tasks Inbox**.
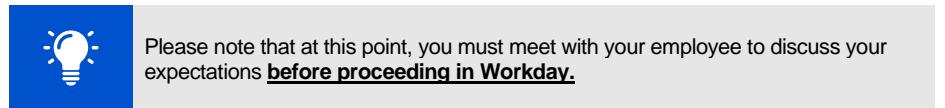
> Please note that at this point, you must meet with your employee to discuss your expectations **before proceeding in Workday.**



**15.** After you have the meeting with your employee, come back to the task and click **Get Started**.

**16.** Advance to the Acknowledgement section of the task then change the **Status** to **Acknowledge Review Discussion Complete**. Then, click **Submit** at the bottom of the screen.

Clicking **Submit** will route the corrective action to the employee's **My Tasks Inbox** for their acknowledgement.



Please note that the employee acknowledgement step will be skipped if the **Corrective Action Level** (see step 7) you chose is **Coach & Counsel** or if the employee is in Mexico.

In Mexico, the Manager is required to print out the document and get a wet signature from the employee.

## Monitoring a Corrective Action

To get started, click on the **Menu** icon in the top left-hand corner of your Workday Homepage. Then, select the **Team Performance** application.
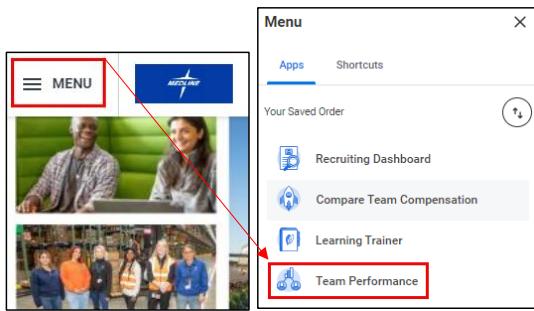


1. From the **Performance** menu on the right-hand side of the screen, select **Employee Reviews.**
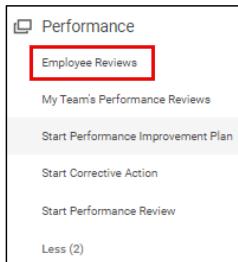


2. Next, select your **Organization**. Then, select **Corrective Action Plan** from the **Review Templates** drop-down menu.
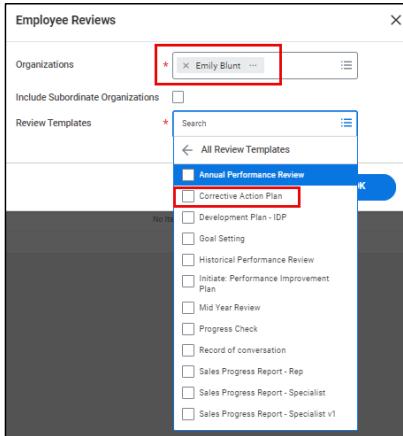
**3.** Click **OK** to proceed.
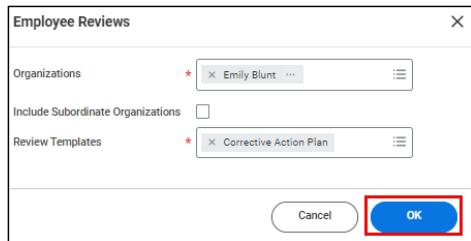


**4.** On the following screen, you will see all **In Progress** and **Completed Corrective Action Plans** for your employees. You can toggle between the **In Progress** and **Completed** tabs to see the status of the plans.



**5.** To review a corrective action process history, click the applicable plan from the **Review** column.

**6.** On the following screen, click any of the steps in the **Process** column to be directed to additional information about that applicable step.