

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.

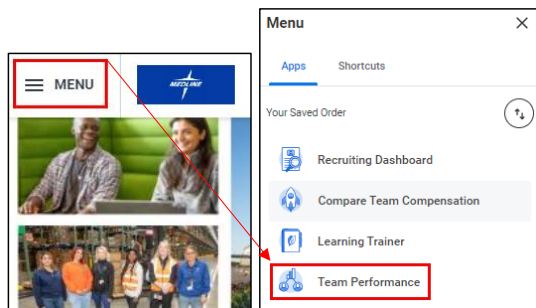
Monitoring a Corrective Action

How to view the status of a corrective action for one of your employees.

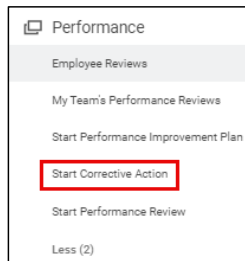
Initiating a Corrective Action

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 reach 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 screenshot of a web form titled 'Start Corrective Action for Employee'. The form contains several fields with red labels 'a.' through 'e.' pointing to them. Field 'a.' is the 'Employee' name. Field 'b.' is the 'Review Template' dropdown. Field 'c.' is the 'Corrective Action Reasons' dropdown. Field 'd.' is the 'Period Start Date' date picker. Field 'e.' is the 'Period End Date' date picker. At the bottom right are 'Cancel' and 'Submit' buttons. There is also instructional text at the top of the form.

- 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 | <ul style="list-style-type: none">• Attendance• No Call/No Show |
| Conduct | <ul style="list-style-type: none">• Dishonest Act• Insubordination• Misconduct |
| Performance | <ul style="list-style-type: none">• Unsatisfactory Performance |
| Policy Violation | <ul style="list-style-type: none">• Violation of Company Policy• 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 *

Review Template *

Corrective Action Reasons *

Related Corrective Actions

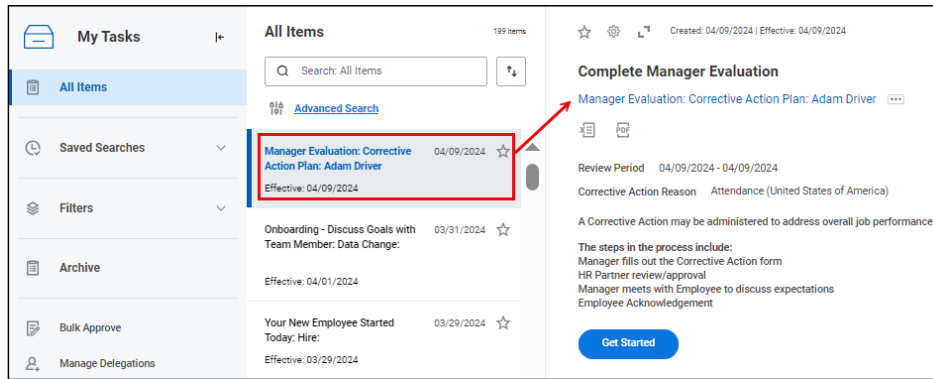
Period Start Date *

Period End Date *

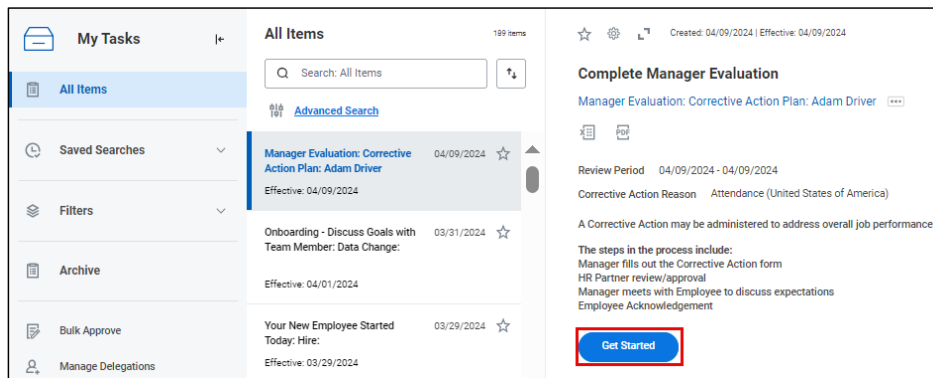
Commented [KK1]: You might pull a new screenshot from MED5 - we have updated this text slightly.

Commented [DB2R1]: Note to Medline: Screenshot to be replaced in final version

- 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.

Complete Manager Evaluation

Manager Evaluation:
Corrective Action Plan: Adam Driver

Actions

04/09/2024 - 04/09/2024

Corrective Action Information

Corrective Action Level

Corrective Action Details

Corrective Action Duration

Supporting Documents

Employee Acknowledgement/At Will Discl...

Review and Submit

Corrective Action Information

Corrective Action Reason Attendance (United States of America)

Back

Next

Close

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.

Complete Manager Evaluation

Manager Evaluation:
Corrective Action Plan: Adam Driver

Actions

04/09/2024 - 04/09/2024

Corrective Action Information

Corrective Action Level

Corrective Action Details

Corrective Action Duration

Supporting Documents

Employee Acknowledgement/At Will Disc...

Review and Submit

Corrective Action Level

Question

Please Select the corrective action level

Manager

Select *

select one

select one

Coach & Counsel

Written Warning

Final Written Warning

Back

Next

...

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

Complete Manager Evaluation

Manager Evaluation:
Corrective Action Plan: Adam Driver

Actions

04/09/2024 - 04/09/2024

Corrective Action Information

Corrective Action Level

Corrective Action Details

Corrective Action Duration

Supporting Documents

Employee Acknowledgement/At Will Disc...

Review and Submit

Corrective Action Details

Question

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

Manager

Answer *

Normal

B

I

U

A

...

...

...

a.

Question

Expected Behavior: Describe the measurable/tangible improvement expectations.

Manager

Answer *

Format

B

I

U

A

...

...

...

b.

Back

Next

Save for Later

...

- 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**.

The screenshot shows a web application interface for 'Complete Manager Evaluation'. On the left is a sidebar with a list of steps: 'Corrective Action Information', 'Corrective Action Level', 'Corrective Action Details', 'Corrective Action Duration' (which is highlighted), 'Supporting Documents', 'Employee Acknowledgement/At Will Disc...', and 'Review and Submit'. The main content area is titled 'Corrective Action Duration' and includes a note: 'For site specific policies, refer to your policy document for duration.' Below this is a question: 'Please select the corrective action duration'. A dropdown menu is open, showing options: 'select one', '6 months', '12 months', 'Permanent', 'Not Applicable', and 'Other'. The 'Next' button at the bottom is highlighted with a red box.

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.

Complete Manager Evaluation

Manager Evaluation:
Corrective Action Plan: Adam Driver

Actions

04/09/2024 - 04/09/2024

- Corrective Action Information
- Corrective Action Level
- Corrective Action Details
- Corrective Action Duration
- Supporting Documents
- Employee Acknowledgement/At Will Discl...
- Review and Submit

Supporting Documents


You may upload documents here to support the Corrective Action.
Please note – anything uploaded here will be visible to the employee when the corrective action is completed.

Manager

Drop files here

or

Select files



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**.

Complete Manager Evaluation

Manager Evaluation:
Corrective Action Plan: Adam Driver

Actions


04/09/2024 - 04/09/2024

- Corrective Action Information
- Corrective Action Level
- Corrective Action Details
- Corrective Action Duration
- Supporting Documents
- Employee Acknowledgement/At Will Discl...
- Review and Submit

Supporting Documents

You may upload documents here to support the Corrective Action.
Please note – anything uploaded here will be visible to the employee when the corrective action is completed.

Manager



Corrective Action Document.docx
✓ Successfully Uploaded!

Comment

Upload

Back

Next

Save for Later

Close

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**.

The screenshot shows the 'Complete Manager Evaluation' interface. On the left, a sidebar lists the steps: Corrective Action Information, Corrective Action Level, Corrective Action Details, Corrective Action Duration, Supporting Documents, Employee Acknowledgement/At Will Disclaimer (highlighted), and Review and Submit. The main content area is titled 'Employee Acknowledgement/At Will Disclaimer'. It contains a 'Question' section with the text: '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.' Below this is an 'At-will Disclaimer' section stating: '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.' A final paragraph mentions the '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.' At the bottom, there are four buttons: 'Back', 'Next' (highlighted with a red box), 'Save for Later', and 'Close'.

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

The screenshot shows the 'Complete Manager Evaluation' interface. On the left, a sidebar lists the steps: Corrective Action Information (highlighted), Corrective Action Level, Corrective Action Details, Corrective Action Duration, Supporting Documents, Employee Acknowledgement/At Will Disclaimer, and Review and Submit. The main content area is titled 'Corrective Action Information'. It shows 'Corrective Action Reason' as 'Attendance (United States of America)'. Below this is the 'Corrective Action Level' section, which has a 'Question' that says 'Please Select the corrective action level'. The 'Manager' section shows 'Select' as 'Coach & Counsel'. The 'Corrective Action Details' section is empty. At the bottom, there are two buttons: 'Submit' (highlighted with a red box) and 'Save for Later'.

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.**

My Tasks | All Items | 189 Items

Search: All Items

Manager Evaluation: Corrective Action Plan: Adam Driver | 04/10/2024

Due: 04/17/2024 | Effective: 04/09/2024

Onboarding - Discuss Goals with Team Member: Data Change: | 03/31/2024

Effective: 04/01/2024

Your New Employee Started Today: Hire: | 03/29/2024

Effective: 03/29/2024

Provide Manager Review Comments

Manager Evaluation: Corrective Action Plan: Adam Driver

Review Period: 04/09/2024 - 04/09/2024

Corrective Action Reason: Attendance (United States of America)

STOP here and have a conversation.

Now it's time to meet with the employee to discuss your expectations. Once you have that meeting, please advance to the last page of this document and input the acknowledgment that the meeting took place.

Clicking SUBMIT on this form will route the Corrective Action to the employee's Workday inbox for their acknowledgement.

Get Started

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

My Tasks

All Items 199 items

Search: All Items

Manager Evaluation: Corrective Action Plan: Adam Driver 04/10/2024

Due: 04/17/2024

Effective: 04/09/2024

Provide Manager Review Comments

Manager Evaluation: Corrective Action Plan: Adam Driver

Review Period: 04/09/2024 - 04/09/2024

Corrective Action Reason: Attendance (United States of America)

STOP here and have a conversation.

Now it's time to meet with the employee to discuss your expectations. Once you have that meeting, please advance to the last page of this document and input the acknowledgment that the meeting took place.

Clicking SUBMIT on this form will route the Corrective Action to the employee's Workday inbox for their acknowledgement.

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.

Provide Manager Review Comments

Manager Evaluation: Corrective Action Plan: Adam Driver


04/09/2024 - 04/09/2024

Acknowledgement

Manager

Status: **Acknowledge Review Discussion Complete**

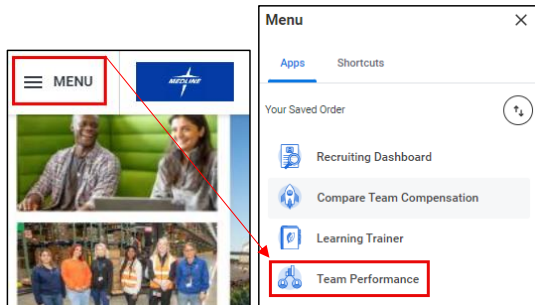
Comment:

 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.

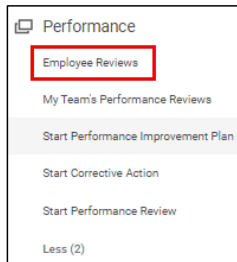
In Mexico, the Manager is required to print out the document and get a wet signature from the employee.

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.

Employee Reviews

Organizations: * Emily Blunt

Include Subordinate Organizations: ☐

Review Templates: * Search

- All Review Templates
- Annual Performance Review
- Corrective Action Plan**
- Development Plan - IDP
- Goal Setting
- Historical Performance Review
- Initiate Performance Improvement Plan
- Mid Year Review
- Progress Check
- Record of conversation
- Sales Progress Report - Rep
- Sales Progress Report - Specialist
- Sales Progress Report - Specialist v1

3. Click **OK** to proceed.

Employee Reviews

Organizations: * Emily Blunt

Include Subordinate Organizations: ☐

Review Templates: * Corrective Action Plan

Cancel OK

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.

Employee Reviews

Organizations: Emily Blunt

Include Subordinate Organizations: No

Review Templates: Corrective Action Plan

In Progress **Completed**

Completed: 1 item

| Organization | Review | Review Category > Review Type | Evaluations |
|--------------|-------------------------------------|---------------------------------------|-------------|
| Emily Blunt | Corrective Action Plan: Adam Driver | Corrective Action > Corrective Action | Manager |

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

Employee Reviews

Organizations

Emily Blunt

Include Subordinate Organizations

No

Review Templates

Corrective Action Plan

In Progress

Completed

Completed 1 item

| Organization | Review | Review Category > Review Type | Evaluations |
|--------------|-------------------------------------|---------------------------------------|-------------|
| Emily Blunt | Corrective Action Plan: Adam Driver | Corrective Action > Corrective Action | Manager |

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

View Event

Corrective Action Plan: Adam Driver

For

Adam Driver

Overall Process

Corrective Action Plan: Adam Driver

Overall Status

Successfully Completed

Due Date

04/11/2024

Calendars In Use

Consecutive Days (No Calendars Selected)

Process

Process History 5 items

| Process | Step | Status | Completed On | Due Date | Person (Up to 5) | All Persons | Comment |
|---|---|----------------|------------------------|------------|----------------------------|-------------|---------|
| Start Corrective Action | Start Corrective Action | Step Completed | 04/09/2024 03:08:50 PM | 04/11/2024 | Emily Blunt | 1 | |
| Complete Manager Evaluation for Corrective Action | Complete Manager Evaluation for Corrective Action | Submitted | 04/10/2024 12:38:10 PM | | Emily Blunt (Manager) | 1 | |
| Complete Manager Evaluation for Corrective Action | Review Complete Manager Evaluation | Approved | 04/10/2024 12:39:30 PM | 04/12/2024 | Devin O'Neill (HR Partner) | 1 | |
| Complete Manager Evaluation for Corrective Action | Provide Manager Review Comments | Submitted | 04/10/2024 12:47:48 PM | 04/17/2024 | Emily Blunt (Manager) | 1 | |
| Complete Manager Evaluation for Corrective Action | Provide Employee Review Comments | Not Required | | | | 0 | |