

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.

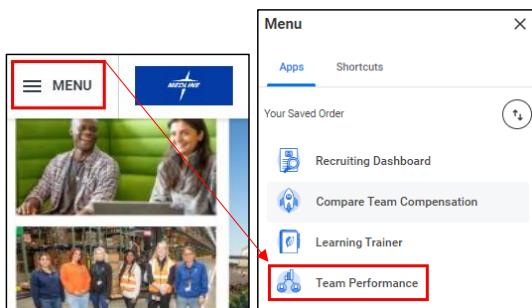
Monitoring a Corrective Action

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

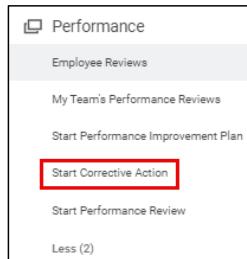
Initiating a Corrective Action

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.



- From the **Performance** menu on the right-hand side of the screen, select **Start Corrective Action**.



- Next, fill out the details of the corrective action:

A screenshot of a dialog box titled 'Start Corrective Action for Employee'. The box contains instructions: '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.' The form fields are: 'Employee' (dropdown, marked with a red box 'a.'), 'Review Template' (dropdown, marked with a red box 'b.'), 'Corrective Action Reasons' (dropdown, marked with a red box 'c.'), 'Related Corrective Actions' (dropdown), 'Period Start Date' (date picker, marked with a red box 'd.'), and 'Period End Date' (date picker, marked with a red box 'e.'). At the bottom are 'Cancel' and 'Submit' buttons.

- Enter the name of the **Employee** who is receiving the corrective action.
- From the **Review Template** drop-down menu, select **Corrective Action** then **Corrective Action Plan**.
- 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: Adam Driver

Review Template: Corrective Action Plan

Corrective Action Reasons: Attendance (United States of America)

Related Corrective Actions: (empty)

Period Start Date: 04/09/2024

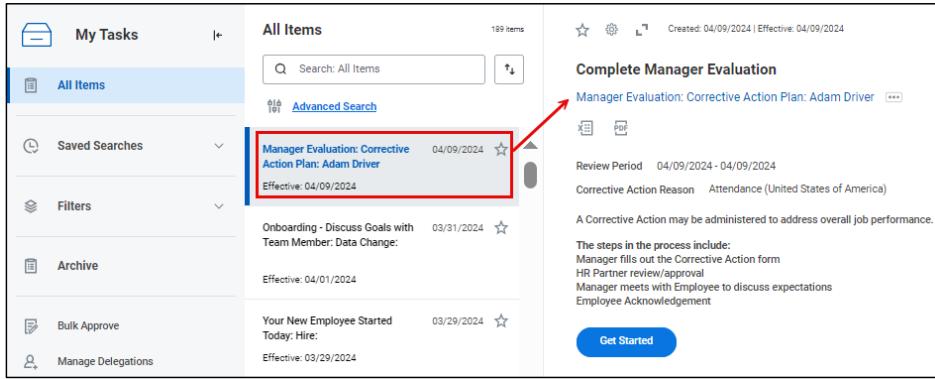
Period End Date: 04/09/2024

Submit

Commented [KK1]: You might pull a new screenshot from MEDS - 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.



My Tasks

All Items

Saved Searches

Filters

Archive

Bulk Approve

Manage Delegations

All Items

Manager Evaluation: Corrective Action Plan: Adam Driver

Effect: 04/09/2024

Onboarding - Discuss Goals with Team Member: Data Change:

Effective: 04/01/2024

Your New Employee Started Today: Hire:

Effective: 03/29/2024

Created: 04/09/2024 | Effective: 04/09/2024

Complete Manager Evaluation

Manager Evaluation: Corrective Action Plan: Adam Driver

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

Corrective Action Reason: Attendance (United States of America)

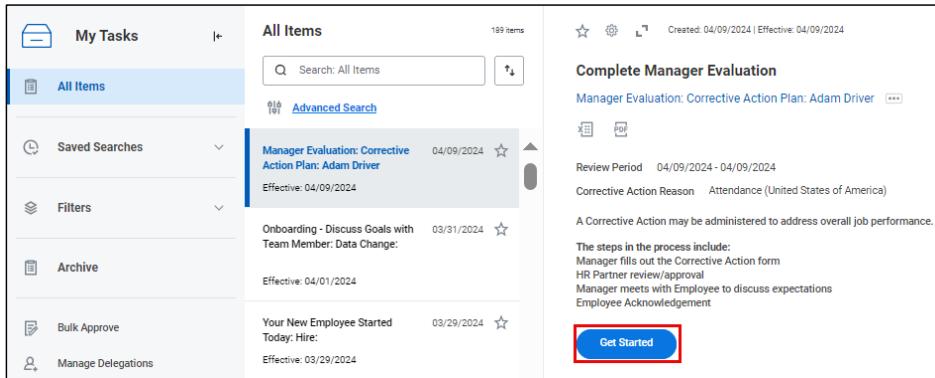
A Corrective Action may be administered to address overall job performance.

The steps in the process include:

- Manager fills out the Corrective Action form
- HR Partner review/approval
- Manager meets with Employee to discuss expectations
- Employee Acknowledgement

Get Started

5. Click **Get Started**.



My Tasks

All Items

Saved Searches

Filters

Archive

Bulk Approve

Manage Delegations

All Items

Manager Evaluation: Corrective Action Plan: Adam Driver

Effect: 04/09/2024

Onboarding - Discuss Goals with Team Member: Data Change:

Effective: 04/01/2024

Your New Employee Started Today: Hire:

Effective: 03/29/2024

Created: 04/09/2024 | Effective: 04/09/2024

Complete Manager Evaluation

Manager Evaluation: Corrective Action Plan: Adam Driver

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

Corrective Action Reason: Attendance (United States of America)

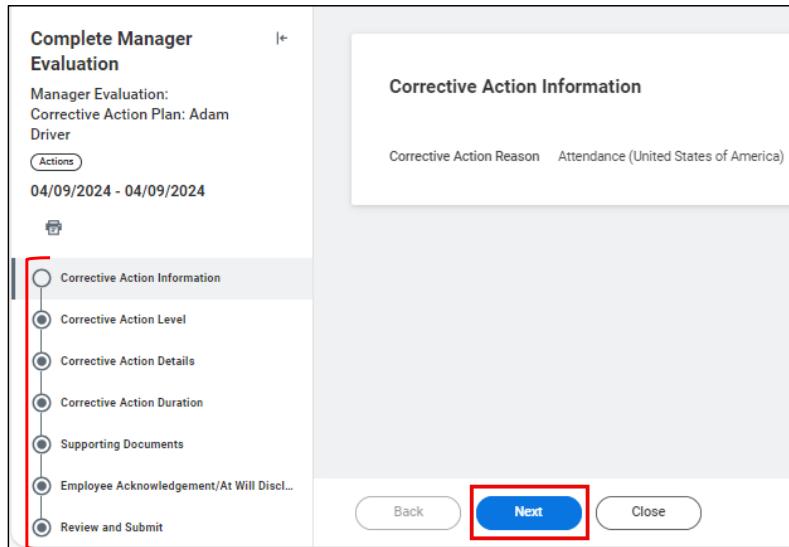
A Corrective Action may be administered to address overall job performance.

The steps in the process include:

- Manager fills out the Corrective Action form
- HR Partner review/approval
- Manager meets with Employee to discuss expectations
- Employee Acknowledgement

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.

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

Coach & Counsel
Written Warning
Final Written Warning

Back ...

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 *

a.

Question Expected Behavior: Describe the measurable/tangible improvement expectations.

Manager

Answer *

b.

Back 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**.

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 Disol...

Review and Submit

Corrective Action Duration

For site specific policies, refer to your policy document for duration.

Question: Please select the corrective action duration.

Manager

Select one

select one

6 months

12 months

Permanent

Not Applicable

Other

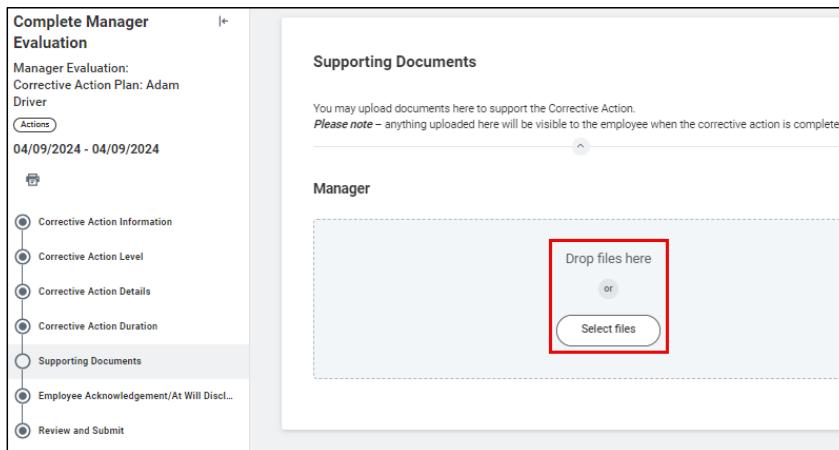
Back

Next

Save for Later

...

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 Disclo...
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.

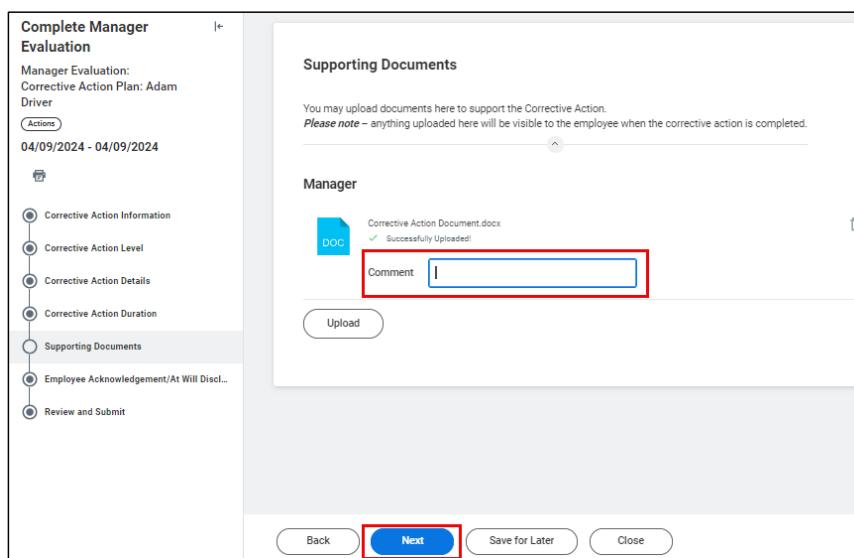
Manager

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 Disclo...
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**.

Employee Acknowledgement/At Will Disclaimer

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 or 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.

Back **Next** Save for Later Close

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

Corrective Action Information

Corrective Action Reason: Attendance (United States of America)

Corrective Action Level

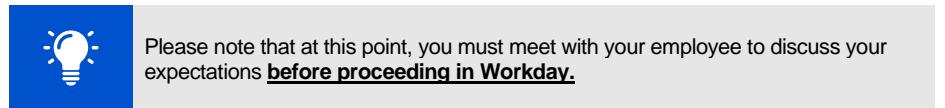
Manager

Select: Coach & Counsel

Corrective Action Details

Submit 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**.



My Tasks

All Items

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.

Get Started

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

My Tasks

All Items

Manager Evaluation: Corrective Action Plan: Adam Driver

Onboarding - Discuss Goals with Team Member: Data Change

Your New Employee Started Today: Hire

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

Actions

04/09/2024 - 04/09/2024

Summary

Acknowledgement

Acknowledgement

Manager

Status: Acknowledge Review Discussion Complete

Comment:

Get Started

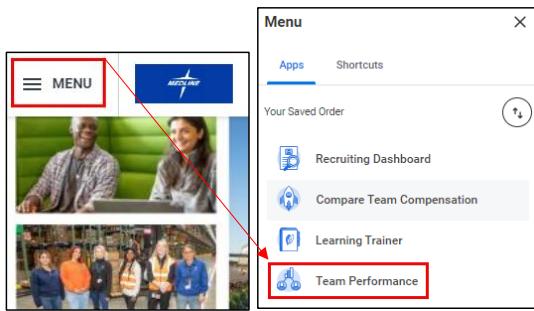
Please note that the employee acknowledgement step will be skipped if the **Corrective Action Level** (see step 7) you chose is **Coach & Counsel** or if the employee is in Mexico.



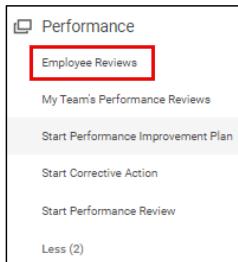
In Mexico, the Manager is required to print out the document and get a wet signature from the employee.

Monitoring a Corrective Action

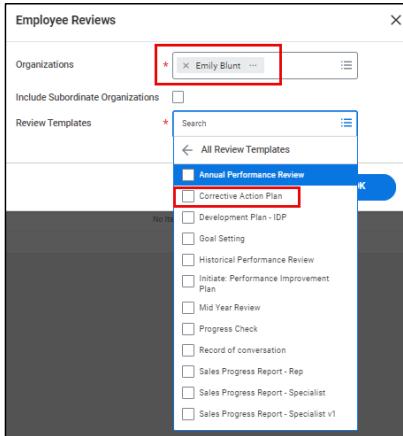
To get started, click on the **Menu** icon in the top left-hand corner of your Workday Homepage. Then, select the **Team Performance** application.



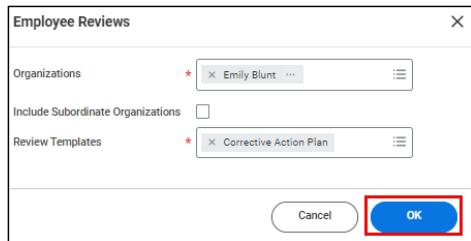
1. From the **Performance** menu on the right-hand side of the screen, select **Employee Reviews**.



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.

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 <table border="1"> <tr> <td>Organization</td> <td>Review</td> <td>Review Category > Review Type</td> <td>Evaluations</td> </tr> <tr> <td>Emily Blunt</td> <td>Corrective Action Plan: Adam Driver</td> <td>Corrective Action > Corrective Action</td> <td>Manager</td> </tr> </table>		Organization	Review	Review Category > Review Type	Evaluations	Emily Blunt	Corrective Action Plan: Adam Driver	Corrective Action > Corrective Action	Manager
Organization	Review	Review Category > Review Type	Evaluations						
Emily Blunt	Corrective Action Plan: Adam Driver	Corrective Action > Corrective Action	Manager						

6. 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 <table border="1"> <tr> <td colspan="8">Process History 5 items</td> </tr> <tr> <td>Process</td> <td>Step</td> <td>Status</td> <td>Completed On</td> <td>Due Date</td> <td>Person (Up to 5)</td> <td>All Persons</td> <td>Comment</td> </tr> <tr> <td>Start Corrective Action</td> <td>Start Corrective Action</td> <td>Step Completed</td> <td>04/09/2024 03:08:50 PM</td> <td>04/11/2024</td> <td>Emily Blunt</td> <td>1</td> <td></td> </tr> <tr> <td>Complete Manager Evaluation for Corrective Action</td> <td>Complete Manager Evaluation for Corrective Action</td> <td>Submitted</td> <td>04/10/2024 12:38:10 PM</td> <td></td> <td>Emily Blunt (Manager)</td> <td>1</td> <td></td> </tr> <tr> <td>Complete Manager Evaluation for Corrective Action</td> <td>Review Complete Manager Evaluation</td> <td>Approved</td> <td>04/10/2024 12:39:30 PM</td> <td>04/12/2024</td> <td>Devin O'Neill (HR Partner)</td> <td>1</td> <td></td> </tr> <tr> <td>Complete Manager Evaluation for Corrective Action</td> <td>Provide Manager Review Comments</td> <td>Submitted</td> <td>04/10/2024 12:47:48 PM</td> <td>04/17/2024</td> <td>Emily Blunt (Manager)</td> <td>1</td> <td></td> </tr> <tr> <td>Complete Manager Evaluation for Corrective Action</td> <td>Provide Employee Review Comments</td> <td>Not Required</td> <td></td> <td></td> <td></td> <td>0</td> <td></td> </tr> </table>		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	
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																																																			