

Overview

Use this job aid as a resource to complete Disciplinary Action for an employee in Workday. If applicable, please refer to the Collective Bargaining Agreements (CBA). Contact your HRIC or ELR if you have any questions.

Start Disciplinary Action

1. Enter and select **Start Disciplinary Action for Employee** in the Workday search bar.
2. Click the **Employee** field or type in employee name. Select an employee.
3. Click the **Review Template** field. Click Disciplinary Action. Select the type of disciplinary action.
4. Click the **Disciplinary Action Reasons** Field and select **Reasons for employee's country > United States of America > Disciplinary Action**>select one or more reasons.

Note: You may select as many reasons as needed.

5. If applicable, select **Related Disciplinary Actions**.

Note: Related Disciplinary Actions populate in the menu if the worker has existing Disciplinary Action items.

6. Enter the **Period Start Date** and the **Period End Date**.

Important: The review period you select includes the time period in which the violations have taken place.

7. Click **Submit**.

Note: The Complete Manager Evaluation task appears in your Workday inbox. The Manager Evaluation template instructions and needed approvals vary based on the Review Template you selected.

Continue to the section below that corresponds to the selected review template.

Complete Manager Evaluation: Verbal Reprimand

1. Locate and select the **Manager Evaluation** task from your Workday inbox.
2. Carefully read all instructions.
3. Click **Go to Guided Editor**.

Note: The remaining steps in the Complete Manager Evaluation task consist of several pages (e.g. Disciplinary Action Information and Supporting Documents). Each page title and related steps are listed below.

Disciplinary Action Information

1. The **Disciplinary Action Reasons** selected when you started the Disciplinary Action auto-populate to this page. No action is needed.
2. Click **Next**.
3. Click the edit button to answer the **Manager Evaluation Questions**.
4. Click **Next**.

Supporting Documents

1. Click **Add**.
2. Click **Attach**.
3. Enter a brief **Comment** to describe the attachment.
4. Click **Next**.

Summary Page

1. Review all Manager Evaluation details.

Note: If you need to make any changes, click **Guide Me** next to the applicable section and edit as needed.

2. Click **Submit**.

Note: The Manager Evaluation routes to your HRIC and ELR for approvals. Once approvals are complete, you receive the **To Do: Meet with Employee** task in your Workday inbox.

To Do: Meet with Employee

You must have a face to face meeting with the worker before releasing a Disciplinary Action to them. It is expected this conversation be handled professionally and treated discretely. Please contact HR for guidance on this conversation if needed.

View Disciplinary Action and Conduct Discussion with Employee

1. Locate and select the **Meet with Employee: Manager Evaluation: Verbal Reprimand** task from your Workday inbox.

2. Click the **Verbal Reprimand** to the right of **Overall Process**.



Note: The Disciplinary Action title varies depending on the review template you selected.

3. Click **Meet with Employee: Manager Evaluation: Verbal Reprimand** from under the **Business Process** column.
4. Click **Details**.
5. Click **View Details**.

Note: The Disciplinary Action details display.

6. Refer to the Disciplinary Action details during the face to face Disciplinary Action discussion with the worker.

Submit Disciplinary Discussion with Employee

1. Locate and select the **Meet with Employee** task from your Workday inbox.
2. Enter your comment.
3. Click **Submit** or click **Save for Later** for a later submission.

Note: The Disciplinary Action routes to the worker for review. The worker may acknowledge the disciplinary action if they wish as this is a Verbal Reprimand and employee acknowledgement is optional. If employee chooses not to acknowledge, please contact ELR. ELR will manually advance the process so that you receive the **Provide Manager Review Comments** task in your Workday inbox.

Provide Manager Review Comments

1. Locate and select the **Manager Evaluation** task from your Workday inbox.
2. Review any **Employee Acknowledgment Comments**.
3. Click the edit button to select your **Status** under the Manager Acknowledgement column.
4. Enter a **Comment** if applicable.
5. Click **Submit**.

Note: The Disciplinary Action Process is complete.

Complete Manager Evaluation: Written Reprimand

1. Locate and select the **Manager Evaluation** task from your Workday inbox.
2. Carefully read all instructions.
3. Click **Go to Guided Editor**.

Note: The remaining steps in the Complete Manager Evaluation task consist of several pages (e.g. Disciplinary Action Information, Letter of Reprimand, and Supporting Documents). Each page title and related steps are listed below.

Disciplinary Action Information

1. The **Disciplinary Action Reasons** selected when you started the Disciplinary Action auto-populate to this page. No action is needed.
2. Click **Next**.
3. Click the edit button to answer the Manager Evaluation **Questions**.
4. Click **Next**.

Supporting Documents

5. Click **Add**.
6. Click **Attach**.
7. Enter a brief **Comment** to describe the attachment.
8. Click **Next**.

Summary Page

1. Review all Manager Evaluation details.

Note: If you need to make any changes, click **Guide Me** next to the applicable section and edit as needed.

2. Click **Submit**.

Note: The Manager Evaluation routes to your HRIC and ELR to review and approve. Once approvals are complete, you receive the **To Do: Meet with Employee** task in your Workday inbox.

To Do: Meet with Employee

You must have a face to face meeting with the worker before releasing a Disciplinary Action to them. It is expected this conversation be handled professionally and treated discretely. Please contact HR for guidance on this conversation if needed.

View Disciplinary Action and Conduct Discussion with Employee

1. Locate and select the **Meet with Employee: Manager Evaluation: Written Reprimand** task from your Workday inbox.

Disciplinary Action

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2. Click the **Disciplinary Action Title** to the right of **Overall Process**.

Overall Process **Written Reprimand: Wendel Worker**

Note: The Disciplinary Action title varies depending on the review template you selected.

3. Click **Meet with Employee: Manager Evaluation: Written Reprimand** from under the **Business Process** column.
4. Click **Details**.
5. Click **View Details**.

Note: The Disciplinary Action details display.

6. Refer to the Disciplinary Action details during the face to face Disciplinary Action discussion with the worker.

Submit Disciplinary Discussion with Employee

1. Locate and select the **Meet with Employee** task from your Workday inbox.
2. Enter your comment.
3. Click **Submit**.

Note: The Disciplinary Action routes to the worker for review. The worker acknowledges the review, then you receive the **Provide Manager Review Comments** task in your Workday inbox.

Provide Manager Review Comments

1. Locate and select the **Manager Review** task from your Workday inbox.

2. Review any **Employee Acknowledgment Comments**.
3. Select your **Status** under the Manager Acknowledgement column.
4. Enter a **Comment** if applicable.
5. Click **Submit**.

Note: The Disciplinary Action Process is complete.