

## Overview

Use this job aid as a resource to complete a Performance Improvement Plan for an employee in Workday. The purpose of the Performance Improvement Plan (PIP) is to address items that have not been successfully addressed through the ongoing performance management cycle in order to clearly identify expectations, progress points, and consequences of not meeting the items set forth in the PIP. If you have any questions, please contact your HRIC or ELR.

## Start Performance Improvement Plan

1. On the Workday Home page, open the **Team Performance** application.
2. Under the Actions tab, click More to see more actions. Click **Start Performance Improvement Plan**.
3. Select the **Employee** from the menu.
4. Select **Performance Improvement Plan (PIP)** as the **Review Template**.
5. Enter the **Period Start Date**.
6. Enter the **Period End Date**.
7. Click **Submit**.

**Note:** The Complete Manager Evaluation task appears in your Workday inbox. Continue to the Complete Manager Evaluation section below.


## Complete Manager Evaluation: PIP

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

**Note:** The remaining steps in the Complete Manager Evaluation task consist of several pages (e.g. Performance Overview, Performance Objectives & Expectations, Supporting Documents, etc.). Each page title and related steps are listed below.

## Manager Evaluation

In this section, you will provide the details of how the worker's performance is not meeting expectations.

1. Click the  button to edit the **Background/Events that led to the PIP** field. In the **Answer** box, enter specific examples of behaviors. Any appropriate background information may be provided in this section. Please cite any reference documents if there are items related to Policies or Procedures for consideration. Click the **checkmark** to save your answer.
2. In the **Purpose** field, click the edit button. In the **Answer** box, enter the purpose of the performance improvement plan. A sample explanation is provided. Click the **checkmark** to save your answer.
3. In the **What are the Areas of Concern** field, click the edit button. In the **Answer** box, enter specific examples of behaviors. Please cite any reference documents if there are items related to Policies or Procedures for consideration. Any appropriate background information may be provided in this

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section. Click the **checkmark** to save your answer.

4. In the **Measures of success** field, click the edit button. In the **Answer** box, enter what the worker must do to improve. Include expected behaviors and performance objectives within the specified timeframe of the PIP. Put in Check in dates. Click the **checkmark** to save your answer.

**Note:** Include expected behaviors and performance objectives. These objectives should be specific, clearly stated, measurable, results oriented, and achievable.

5. Click **Next**.

### Supporting Documents

In this section, you will attach any supporting documents.

1. Click **Add**.
2. Under **File**, click **Attach**. Select a file.
3. Enter a brief **Comment** to describe the attachment.
4. Click the **checkmark** to save the attachment. Click **Add** to add additional supporting documents.
5. 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** or click **Save for Later** to return to the PIP later.

**Note:** The Manager Evaluation routes to your Department Head and ELR to review and approve. Once approvals are complete, you receive the **Have PIP Discussion with Employee** task in your Workday inbox.

### To Do: Meet with the Employee

You must have a face to face meeting with your direct report before releasing a Performance Improvement Plan to the worker. The worker is not a passive recipient of information on which weaknesses and strengths are assessed, but instead is an active participant who shares in the process.

### View PIP and Conduct Discussion with Employee

1. Locate and select the **Meet with the Employee** task from your Workday inbox.
2. Click **Performance Improvement Plan (PIP)** to the right of **Overall Process**.

Overall Process [Performance Improvement Plan \(PIP\): Wendel Worker](#)

3. Click **To Do** in the Awaiting Me column next to the Business Process **Meet with the Employee: Manager Evaluation: Performance Improvement Plan (PIP)**.
4. Go to Details to see the PIP to review and discuss it with the employee.
5. Once the PIP has been discussed with the employee. Enter a brief **Comment** in the comment field. Refer to the PIP details during the face to face PIP discussion with the worker.

### Submit PIP Discussion with Employee

1. Click **Submit** after you held the discussion.

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

2. Click **Details** on the View Event page.
3. Click **View Details**.

**Note:** The PIP details display.

### 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. Click the checkmark to save the Acknowledgement.
5. Click **Submit**.

The PIP is then sent to ELR to initiate the Follow Up PIP.

**Note:** *The manager will* receive an inbox item: Follow-up Performance Improvement Plan.

**Note:** The Complete Manager Evaluation task appears in your Workday inbox. Continue to the Complete Manager Evaluation section below.

### Complete Follow-up PIP

The purpose of the Follow up PIP is to document each follow-up meeting and conversation related to a PIP after it has been issued. Be sure to note both positive and negative changes in performance. It is expected that you follow up regularly with the worker and make an attempt to provide them all reasonable resources to be successful in the completion of this PIP.

1. Locate and select the **Manager Evaluation** task from your Workday inbox.
2. Click **Go To Guided Editor**.

**Note:** If you are returning to this inbox item, the title may appear as **Continue where I left off**.

3. Enter notes in the **Comment box**.

**Important:** Please add a date to each note you enter. You may leave this template in your Workday inbox and update your notes throughout the PIP process as needed. All notes will be visible to the worker. The final note should indicate that the worker has either been notified of their successful completion of the PIP or should indicate what further action will be taken in the event of an unsuccessful completion of the PIP. Once you click Submit, you will not be able to make additional changes to this document.

4. When you are ready to submit the Notes Tracker for Follow-up PIP, click **Next**.
5. Review all **Notes**.
6. Click **Submit**.

**Note:** The Follow-up PIP routes to your Department Head and ELR to review and approve. Once approved, the task 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 process is complete.