

Disciplinary Actions - HRBP

Overview

Disciplinary Actions (DA) are used to document performance or behavior issues and set clear expectations going forward as applicable.

Who Does This: HR Business Partner (HRBP)

Things to Know:

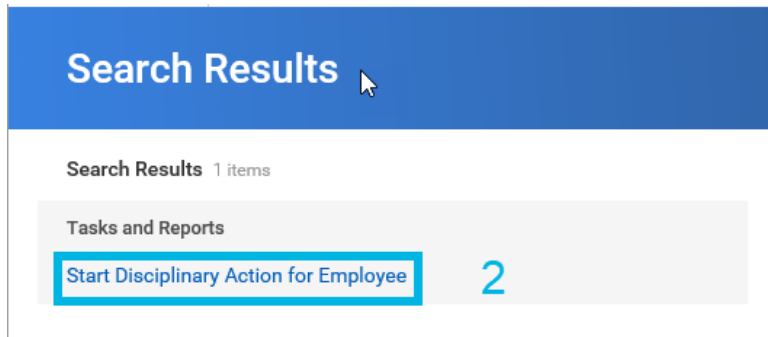
- HR Business Partner (HRBP) initiates this process.
- The employee's Manager also has steps to complete in this process
- All levels of disciplinary actions are included from a written warning to termination.



A search box with a magnifying glass icon on the left and a 'Cancel' button on the right. The text 'dis act' is entered into the search box.

Step 1

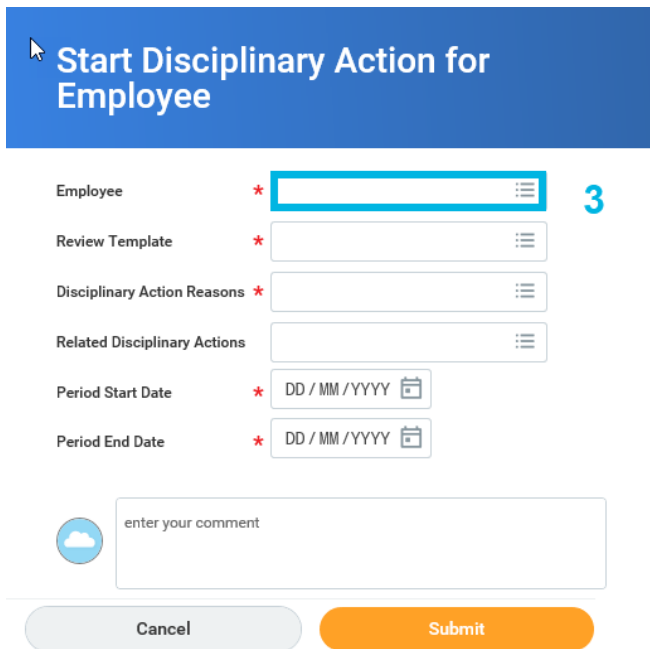
Start typing "dis act" into the Search box.



A screenshot of a search results page. At the top, there is a blue header with the text 'Search Results' and a mouse cursor pointing to it. Below the header, it says 'Search Results 1 items'. Underneath, there is a section titled 'Tasks and Reports'. Within this section, the item 'Start Disciplinary Action for Employee' is highlighted with a blue box, and a large blue number '2' is positioned to its right.

Step 2

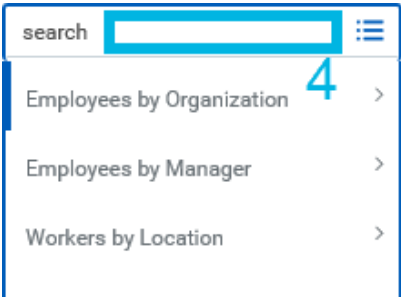
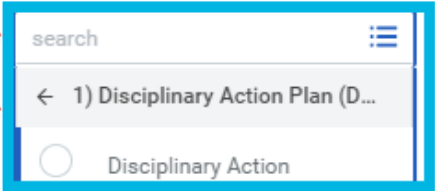

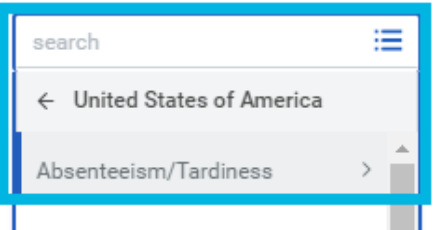



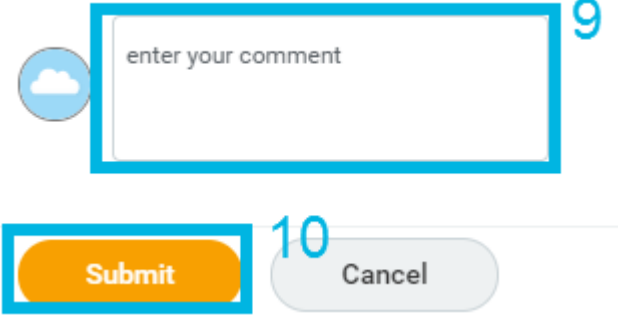
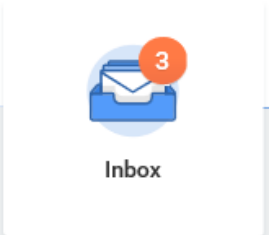
Select the **Start Disciplinary Action for Employee** task.

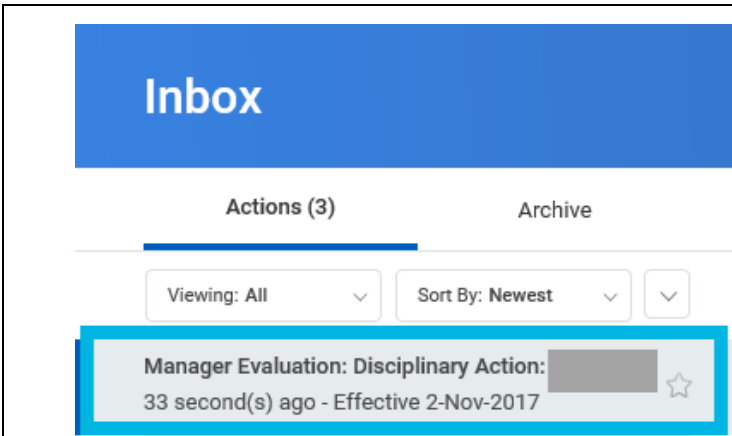


A screenshot of the 'Start Disciplinary Action for Employee' form. The title 'Start Disciplinary Action for Employee' is at the top in a blue header. Below the header, there are several fields: 'Employee' (with a red asterisk and a blue box around it and a large blue number '3' to its right), 'Review Template' (with a red asterisk), 'Disciplinary Action Reasons' (with a red asterisk), 'Related Disciplinary Actions', 'Period Start Date' (with a red asterisk and a date picker), and 'Period End Date' (with a red asterisk and a date picker). At the bottom, there is a text area for 'enter your comment' and two buttons: 'Cancel' and 'Submit'.

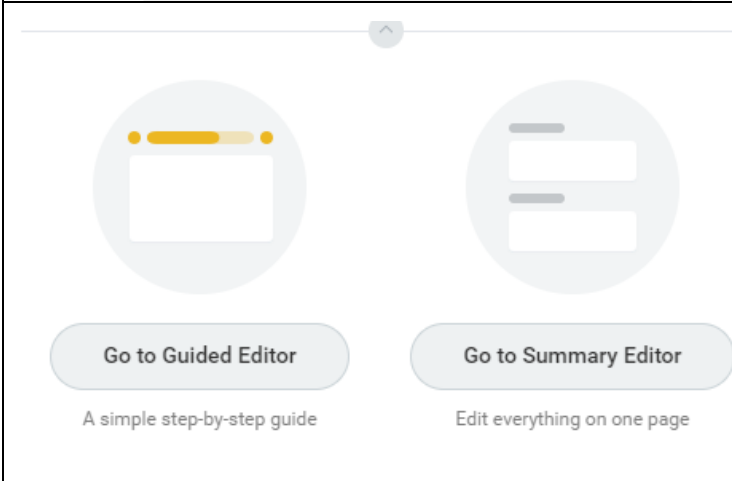
Step 3

Click in the **Employee** box to bring up a search box

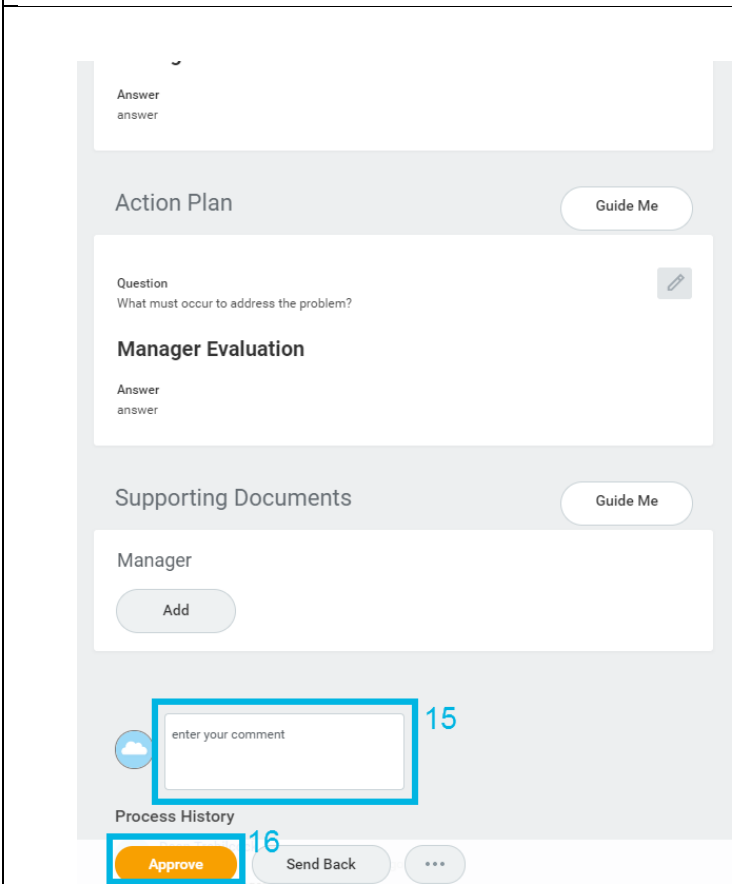
	<p>Step 4 Type the employee name in the search box and press Enter on your keyboard.</p>
	<p>Step 5 Use the list icon  to select Disciplinary Action as the Review Template.</p>
	<p>Step 6 Use the list icon  to select a Disciplinary Action Reason. box to bring up a list.</p>
	<p>Step 7 Use the list icon to  select Related Disciplinary Actions as applicable.</p> <p>Step 8 Enter the Period Start Date and Period End Date will bring up a calendar. Both dates must be the same.</p>
	<p>Step 9 Add comments (Optional). Comments will be visible to the Manager throughout the process and to the employee during his/her acknowledgement step.</p> <p>Step 10 Click Submit. The DA form will now route to the Manager.</p>
	<p>Step 11 Once the Manager has completed DA form, you will receive a task in your Inbox. Choose the Inbox worklet.</p>




Step 12
 Select the Inbox task **Manager Evaluation: Disciplinary Action**.



Step 13
 Select **Go to Guided Editor** or **Go to Summary Editor**.

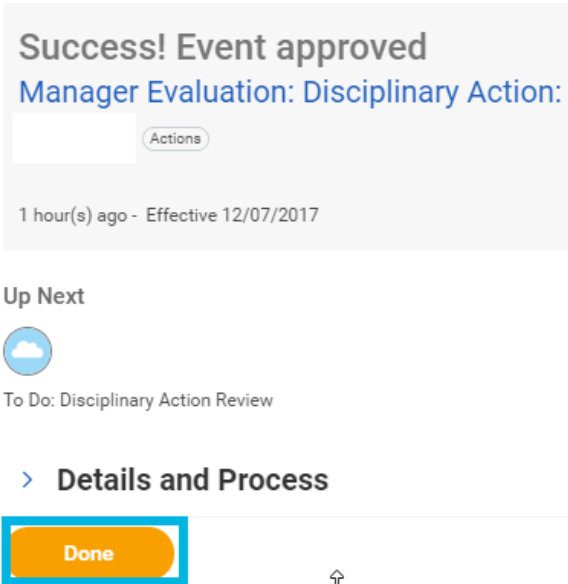


Step 14
 Review the DA form.

If edits are needed, use the pencil icon  to make changes.

Step 15
 Enter comments (optional). Comments will be visible to the Manager prior to delivery and to the employee during his/her acknowledgement step.

Step 16
 Select **Approve**.

	<p>You may expend the Details and Process section for more information on next steps in the process.</p> <p>Step 17 Click Done.</p> <p>Outside of Workday, provide the manager with a PDF copy of the DA to use in the disciplinary conversation.</p>
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FAQ's

What happens next? The Manager will receive an Inbox task with a To Do to hold a conversation with the employee. He/she will contact you to receive a copy of the disciplinary action form to use in the disciplinary conversation. Once the Manager submits the To Do, the employee will receive an Inbox task to acknowledge the disciplinary action.

Can I select more than one reason for a disciplinary reason? Yes you can select multiple reasons for issuing a disciplinary action. You can select as many as may apply to the situation.

Why do I see a different list of reasons than shown in the example? Depending on your country, you may have different reasons. Each country has their own specific disciplinary reasons.

If there are more edits needed, or the manager did not complete all of the steps, can I send it back to them to revise? Yes, select the Send Back button at the bottom of the summary screen and the entire process will be sent back to the manager to revise.

How can I see what is happening with this employee to know when this process is complete? In your Inbox, select the Archive tab. Then click on the Manager Evaluation: Disciplinary Action task.

Explanation of the alert message, "Review Contains Hidden Sections From Employee." The disciplinary action form will not be visible to the employee in Workday except during the business process step when he/she receives an Inbox task to acknowledge the disciplinary action.

Who can see the completed Disciplinary Action (DA)? Only your employee's HRBP can see the completed DA. A copy can be requested from HR at any time.