



Disciplinary Actions

Workday allows managers to submit disciplinary actions for review and approval. These will also be issued within Workday.

Disciplinary Action

You can only Start a Disciplinary Action for a direct report on your team. Below are three ways to view employees that are part of your team. Choose the way that works best for you and then continue to follow the steps to Disciplinary Action.

1. go to your **Worker Profile** and select **Team** .
2. Search and select the employees name in the search bar.
3. navigate to the **My Team Management**  application.

Types of Disciplinary Actions

1. Coaching – reviewed and approved by HR > Manager > Regional Manager > Director > Manager to Issue
2. DML (Texas City Union Only)
3. Documented Verbal – reviewed and approved by HR > Manager > Regional Manager > Director > Manager to Issue
4. Written Corrective Action – reviewed and approved by HR > Regional Manager > Director > Joe and Adam
5. Suspension – reviewed and approved by HR > Regional Manager > Director > Joe and Adam

Starting a Disciplinary Action

From the Employee's profile:

1. Select **Actions** > **Talent** > **Start Disciplinary Action**

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The screenshot shows a sidebar menu on the left with 'Talent' selected. The main content area displays a dropdown menu with the following options:

- Get Feedback on Worker
- Give Feedback
- View Feedback
- View Feedback by Request
- View Feedback Given to Others
- Edit Goals
- View Goals
- Add Goal To Employees
- View Development Items
- View Skills
- View Skills and Experience
- View Interests
- Edit Career Profile
- Add to Succession Plan
- Assess Potential
- Print Talent Card
- Start Performance Review
- View Employee Reviews
- Start Development Plan
- Start Disciplinary Action** (highlighted)
- Start Performance Improvement Plan
- Add a Mentor for Worker
- Add Personal Note
- Add as a Connection
- View Mentorships
- View Connections

- The Start Disciplinary Action for Employee task will pop up. Fill in the required fields and click **Submit**.

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Start Disciplinary Action for Employee

Employee *

Review Template *

Disciplinary Action Reasons *

Related Disciplinary Actions

Period Start Date * MM/DD/YYYY

Period End Date * MM/DD/YYYY

- Employee name** should auto populate
- Review template:** **Performance Improvement Process** > **Performance Improvement**

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- c. **Disciplinary Action Reasons:** [Reasons for employee's county](#) > [United States of America](#) > [Action Level](#) > select the type of disciplinary action you think is appropriate
 - d. **Period Start Date:** enter the date of the incident
 - e. **Period End Date:** Same date as the incident
3. A Start Disciplinary Action Confirmation message will pop up. Click **Open**. If you accidentally click off of the pop or need to complete a different task, you can find the in progress task in your Workday inbox.
4. Click **Get Started**.
5. Review the Disciplinary Action Reason is correct and click **Next**.

The screenshot shows the 'Disciplinary Action Information' form in the Workday interface. The left sidebar is titled 'Complete Manager Evaluation' and shows the current step as 'Disciplinary Action Information'. The main content area has a header 'Disciplinary Action Information' and a field for 'Disciplinary Action Reason' with the value 'Coaching (United States of America)'. At the bottom, there are three buttons: 'Back', 'Next', and 'Close'.

6. In the first text box, include the details of the incident and behavioral problems with reference to a specific policy or procedure. This box is for the facts of what happened. In the second box, add manager comments about the employee's behavior and the incident. Click **Next**.

The screenshot shows the next step in the 'Disciplinary Action Information' form. It features two text boxes for entering details. The first box is titled 'Manager' and has a placeholder text: 'Specify violation, performance problem, or behavior issue and provide the reference of procedure/policy.' The second box is also titled 'Manager' and has a placeholder text: 'Reference of Procedure/Policy'. Both boxes have a rich text editor toolbar. At the bottom, there are four buttons: 'Back', 'Next', 'Save for Later', and 'Close'.

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- Upload any supporting documents like the policy and procedure. Click **Next**.
- Review the information you added and click **Submit**. The action will be sent for review and approval.

Issuing a Disciplinary Action

- After the disciplinary action has been reviewed and approved, you will have an action item (Employee Discussion: Manager Evaluation: Performance Improvement: Employee Name) in your Workday Inbox. Select the action item.

Complete To Do [Employee Discussion](#) ⋮ ☆ 📅 PDF ⚙️ ↻


4 minute(s) ago - Due 04/12/2023; Effective 04/18/2023

For [Test-A Employee](#)

Overall Process [Performance Improvement: Test-A Employee](#)

Overall Status [In Progress](#)

Instructions [Please facilitate a conversation with your employee **before clicking submit**. Once submitted, the form will be sent to the employee for review and acknowledgment.](#)



Submit
Save for Later
Close

- Conduct the conversation with the employee. **Make sure you complete the conversation with the employee before selecting submit. Once you hit submit, the action will be sent to the employee's Workday Inbox to add comments and sign.**
- If you need to view the disciplinary action to aid in the discussion with the employee, select **Performance Improvement: Employee Name**. Select **Details** > View **Details**.
- When the discussion is complete, navigate back to the task in your Inbox and add comments and select **Submit**.
- Let the employee know that they need to log into workday to add comments and sign the document.