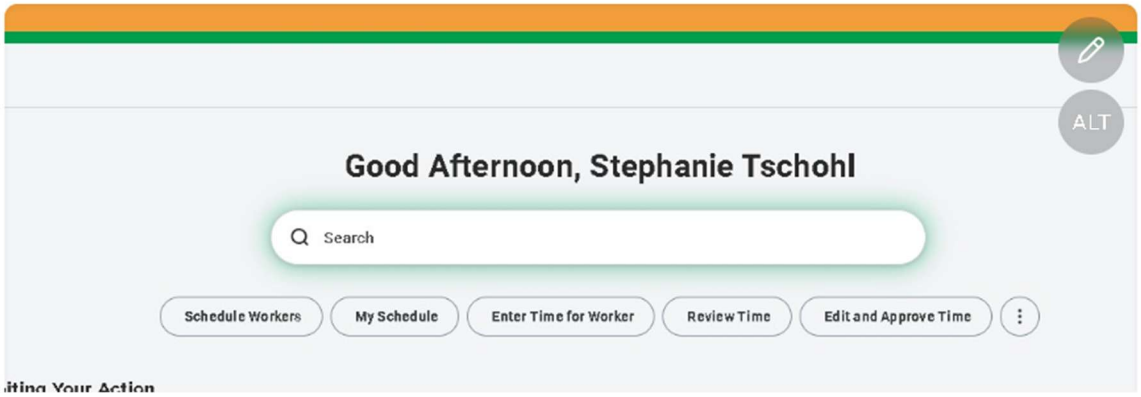
How to Initiate a Disciplinary Action in Workday

Learn the step-by-step process for filing a formal corrective action against an employee within the Workday platform.

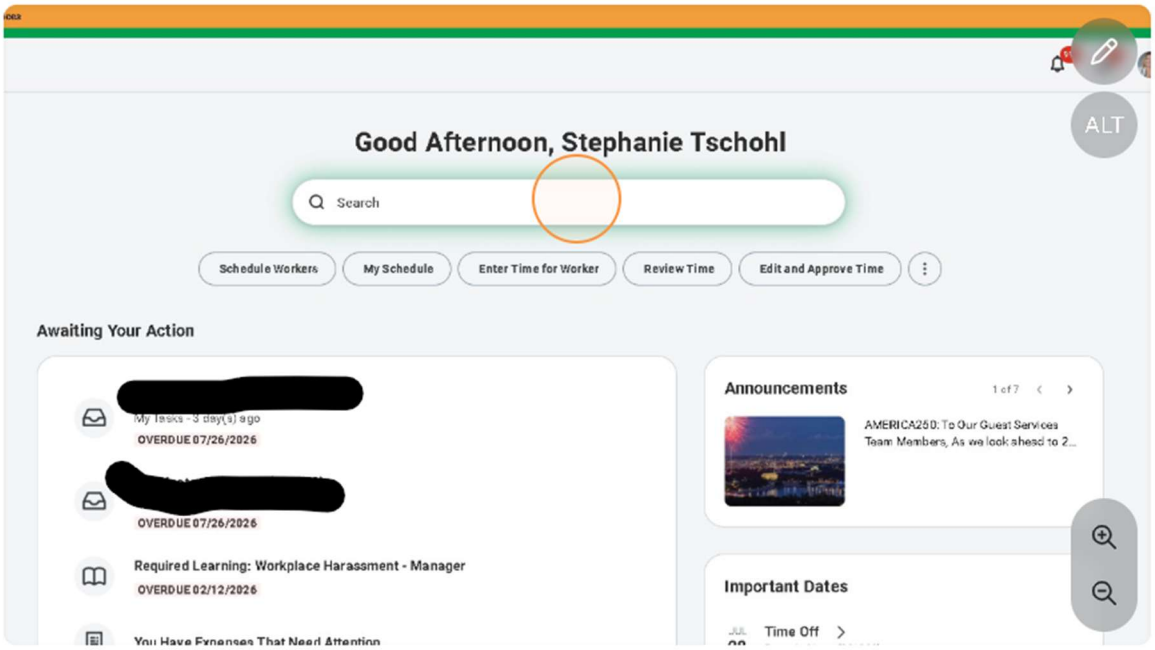
Stephanie Tschohl 47 steps 4 minutes today

Workday

1 Navigate to your Workday homepage

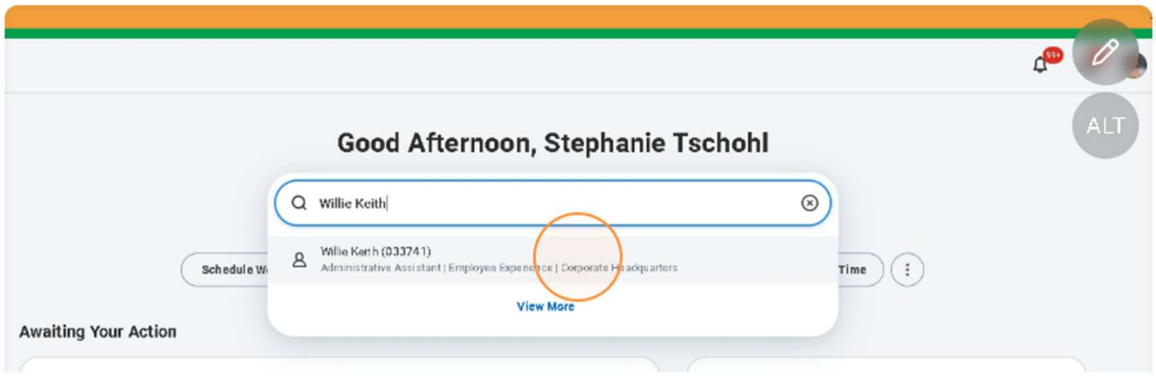


2 Click the "Search" field.

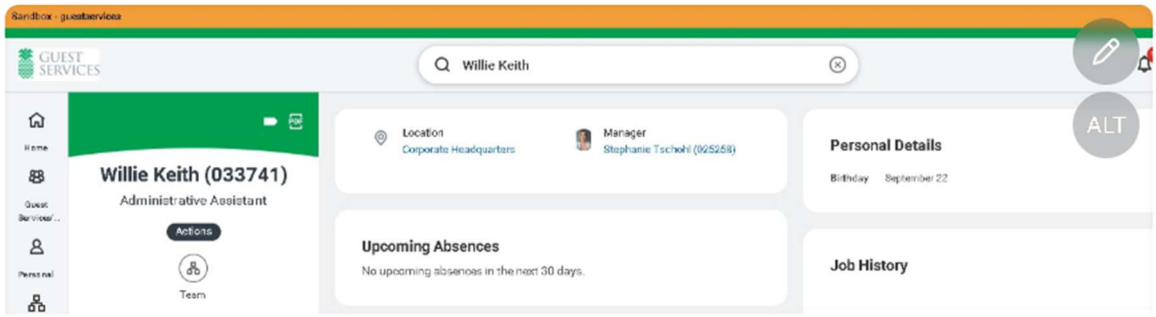


3 Type the name of the team member who will receive the corrective action.

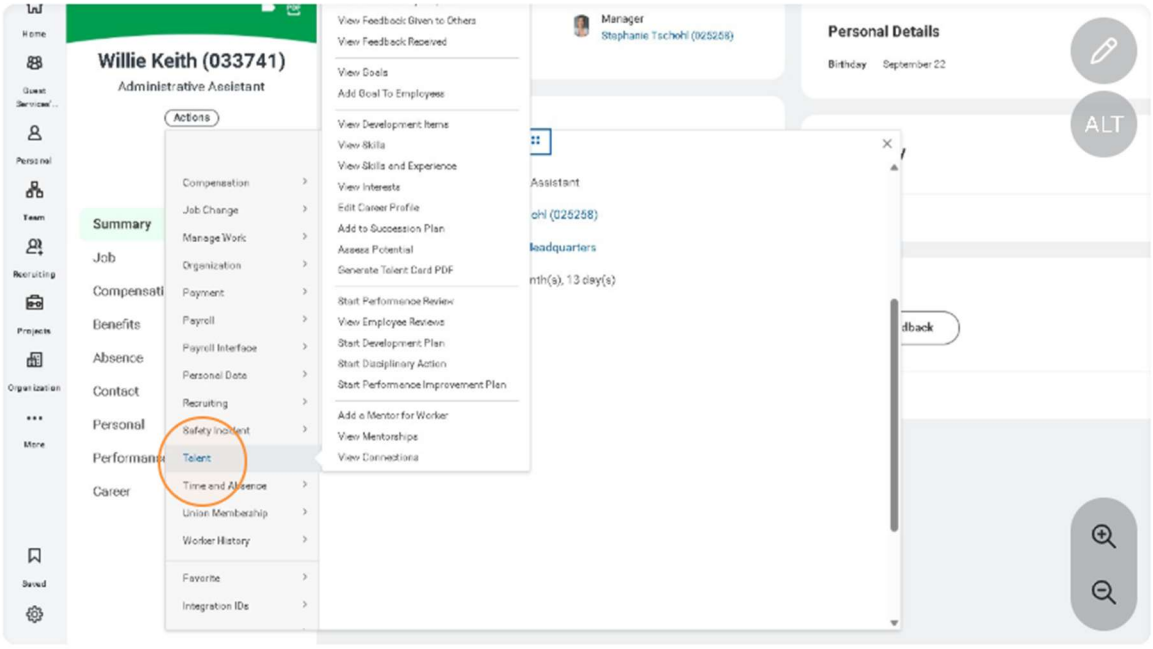
4 Click the team member's name



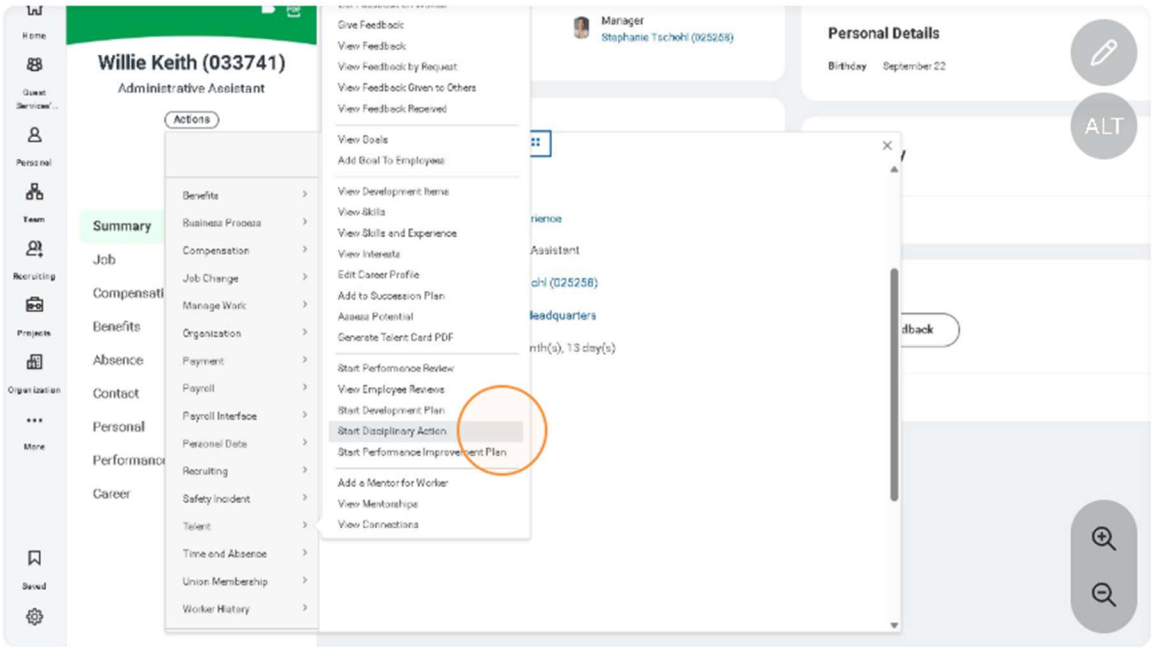
5 On on their profile, Click "Actions"



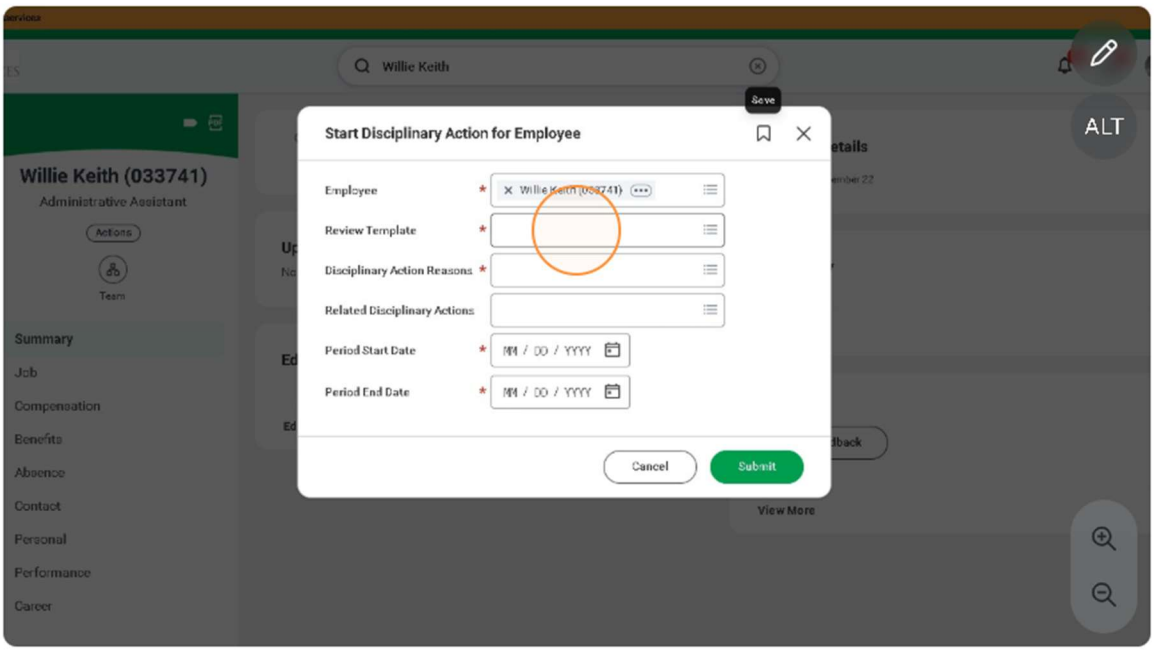
6 Hover over "Talent"



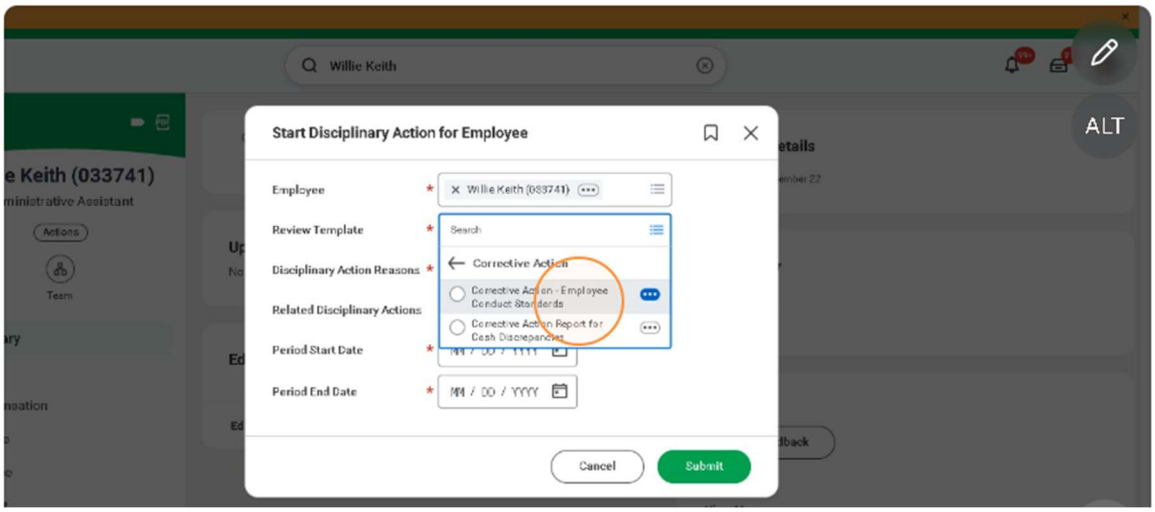
7 Click "Start Disciplinary Action"



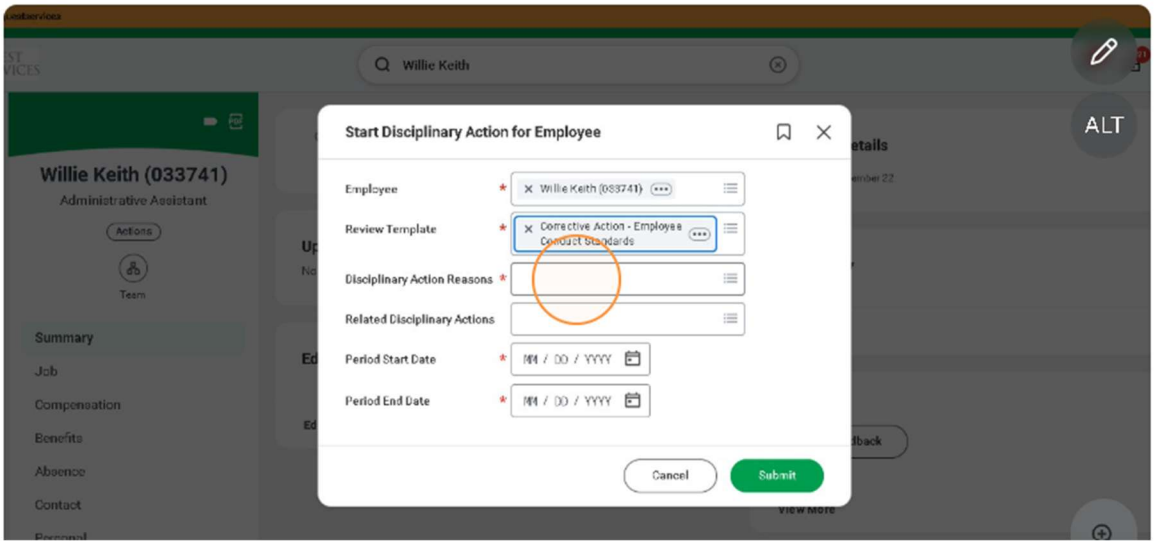
8 The Employee field will be pre-filled. Click the "Review Template" field.



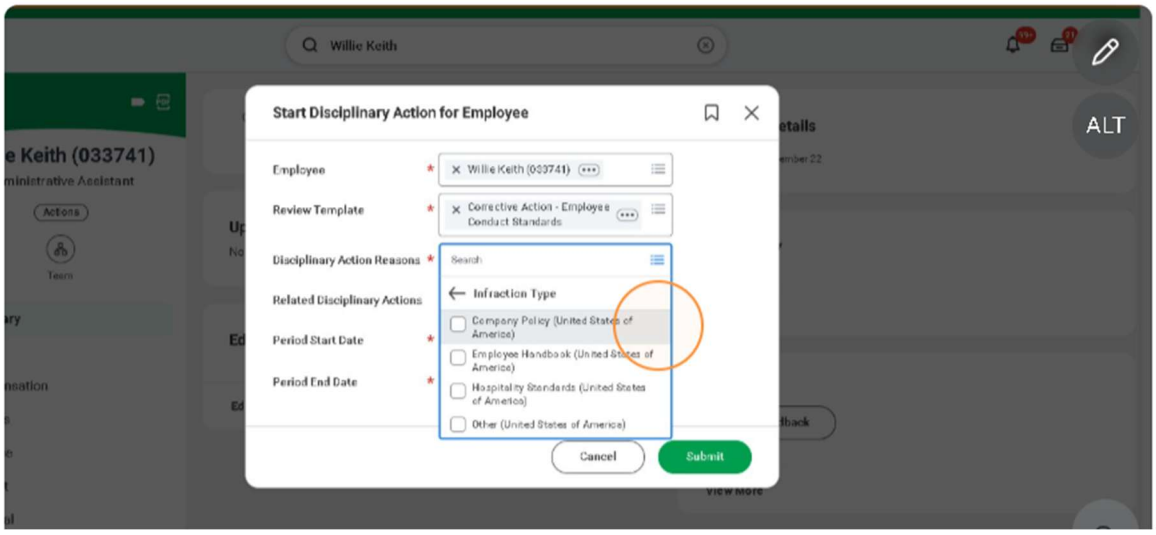
10 Click the appropriate corrective action type



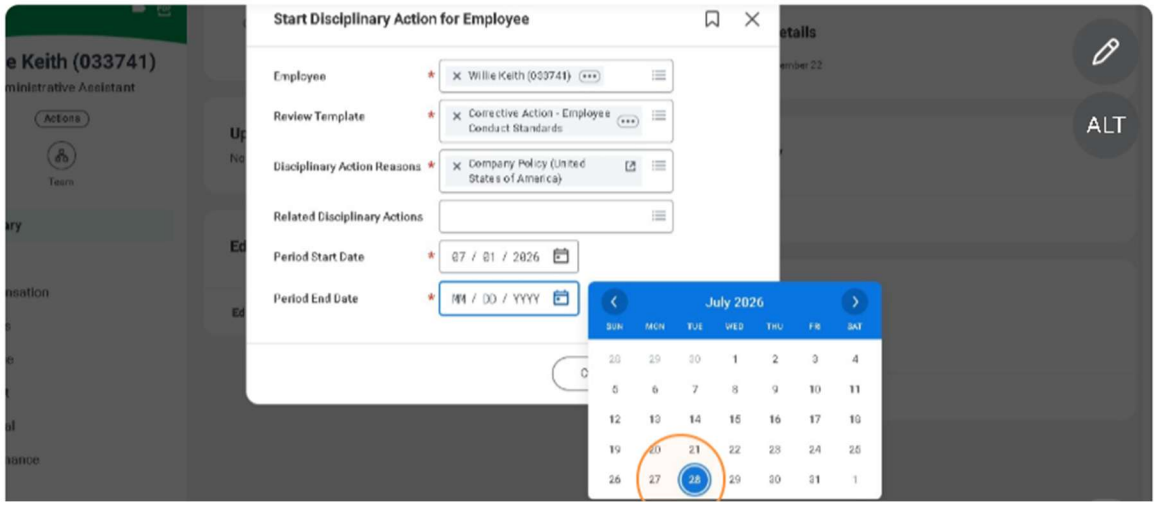
11 Click the "Disciplinary Action Reasons" > Reasons for employees country > United States > Infraction type



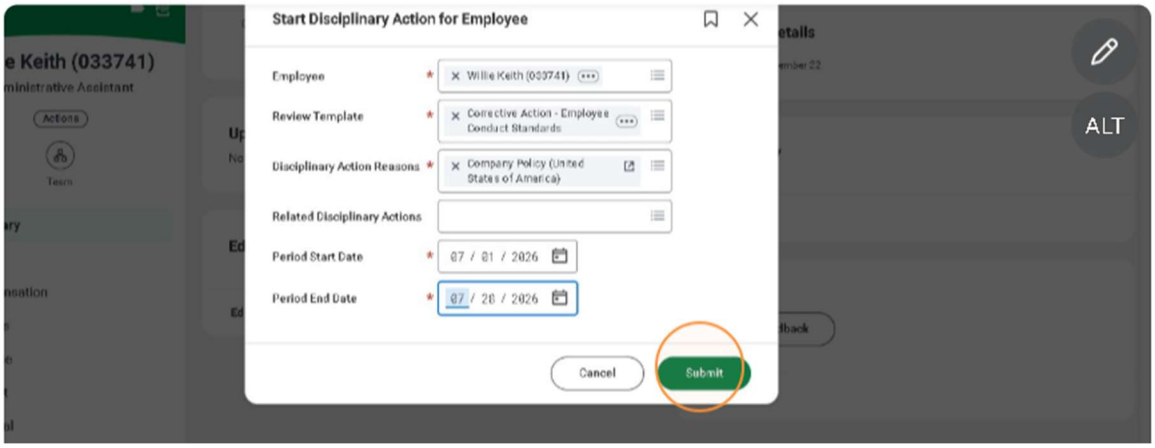
12 Click the appropriate infraction type. You can select more than one.



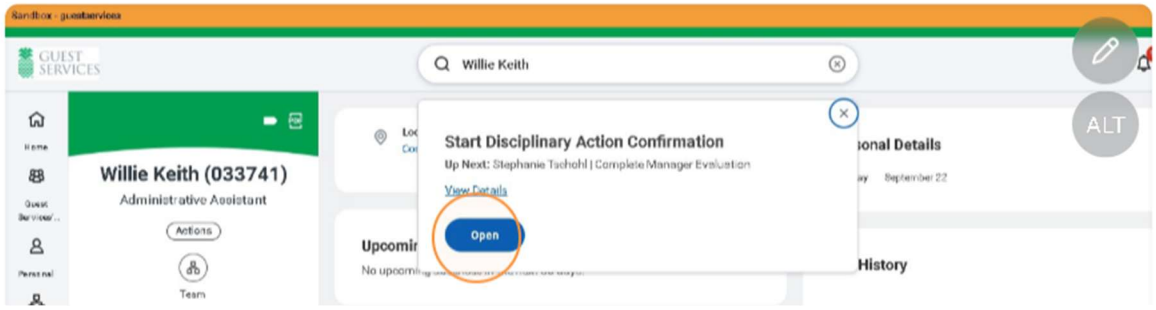
13 Enter the date range of the infraction into the "period start date" and "period end date" fields. Use a range if it's an ongoing issue. If the corrective action is for a specific incident, both fields can have the same date.



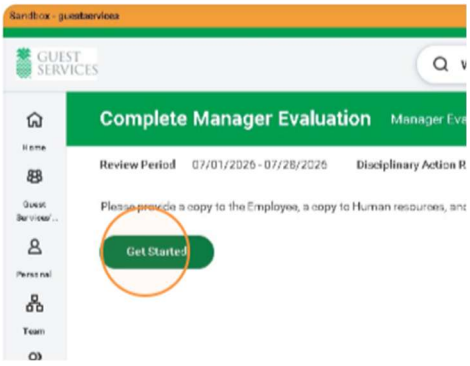
14 Click "Submit"



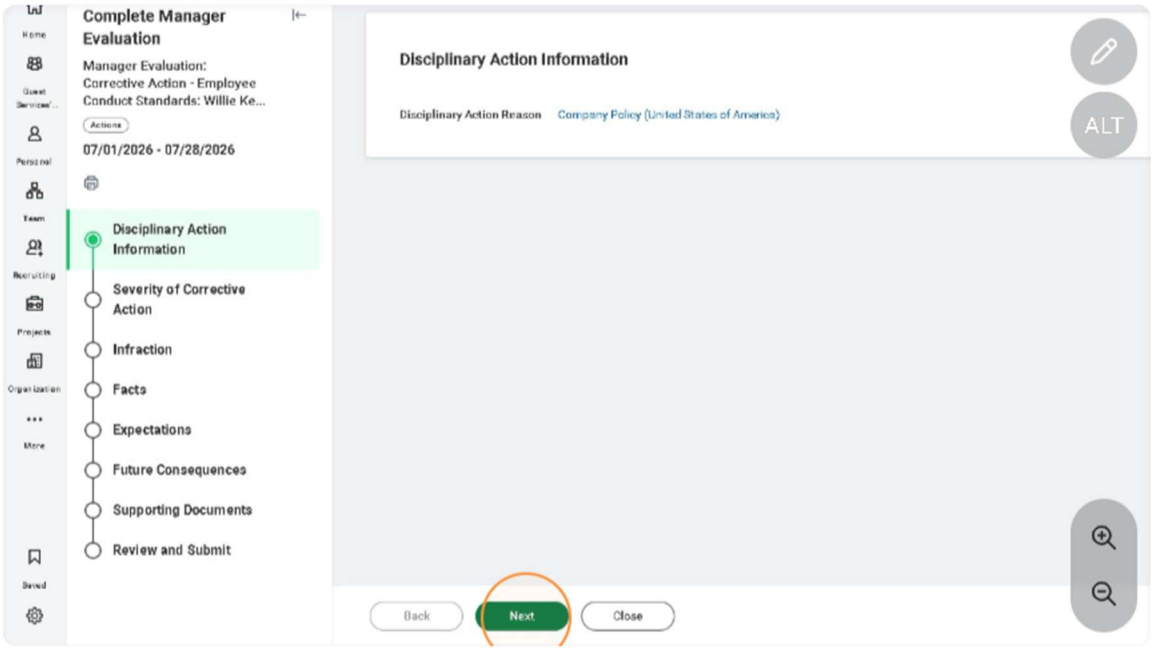
15 Once you click submit, the task goes to the direct manager, the HR Coordinator, and the Initiator. If you are initiating the corrective action for someone else to fill out, you are done. If you will be the one to fill out the corrective action form, Click "Open"



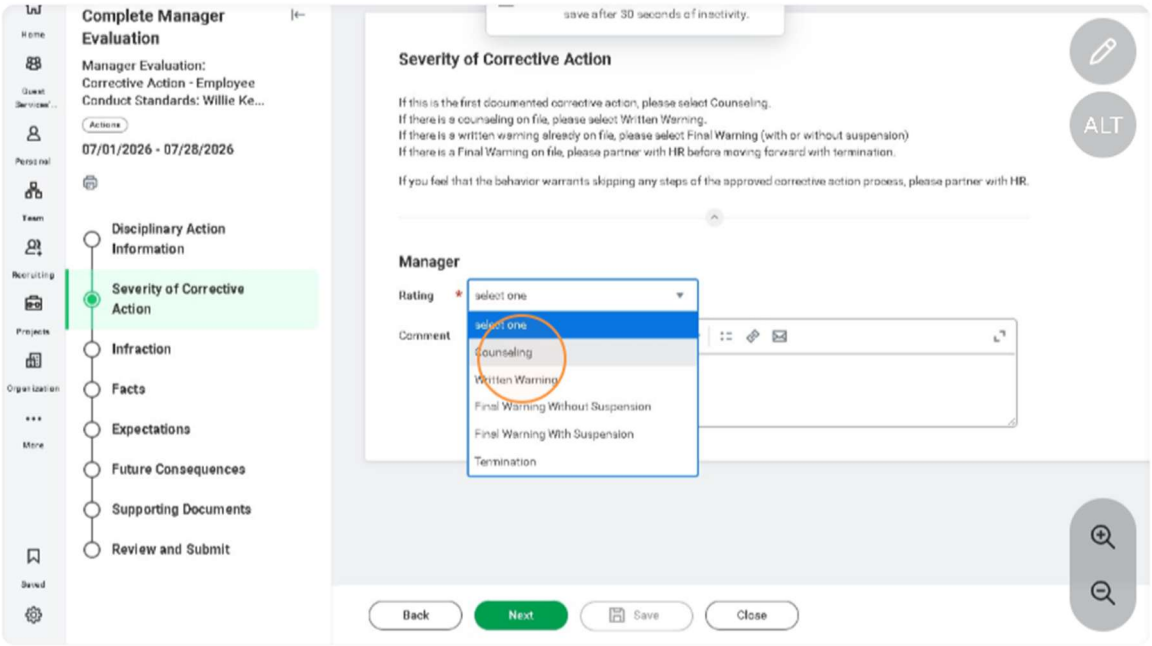
16 Click "Get Started"



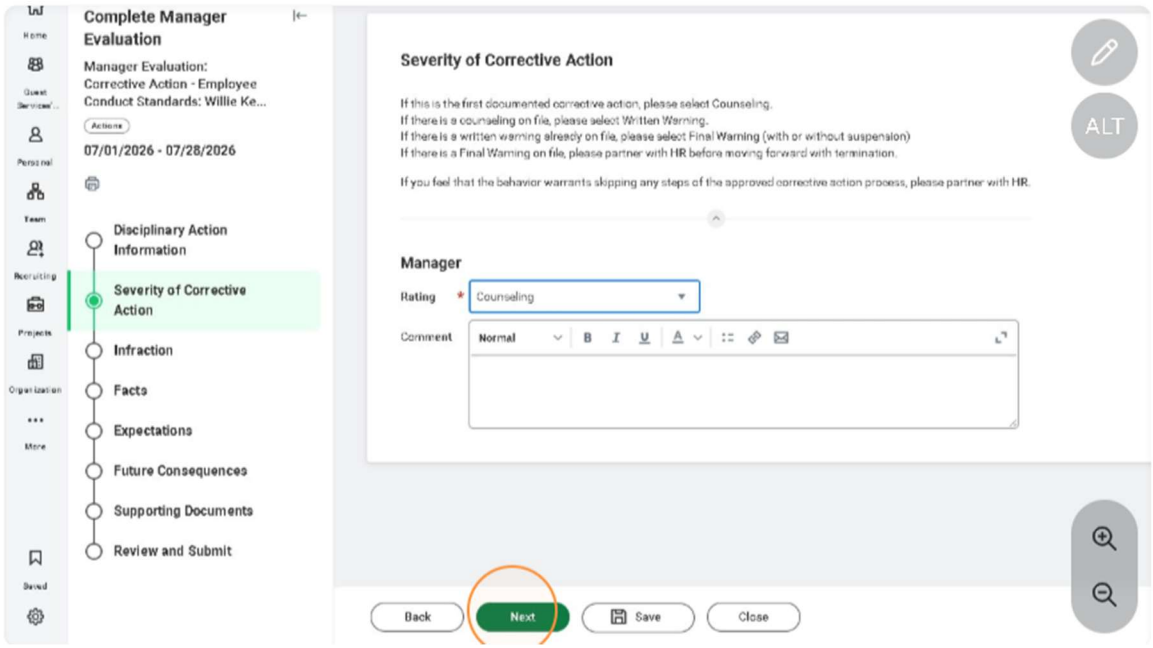
17 Click "Next"



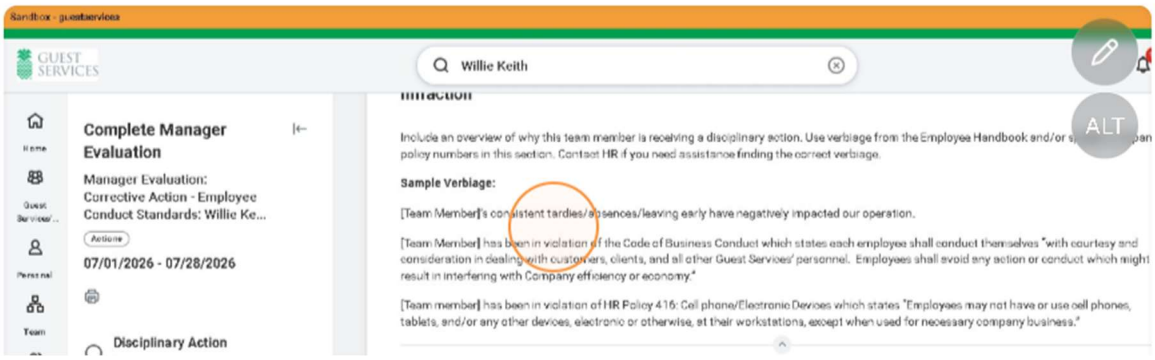
18 Click the appropriate rating. Refer to the help text to determine.



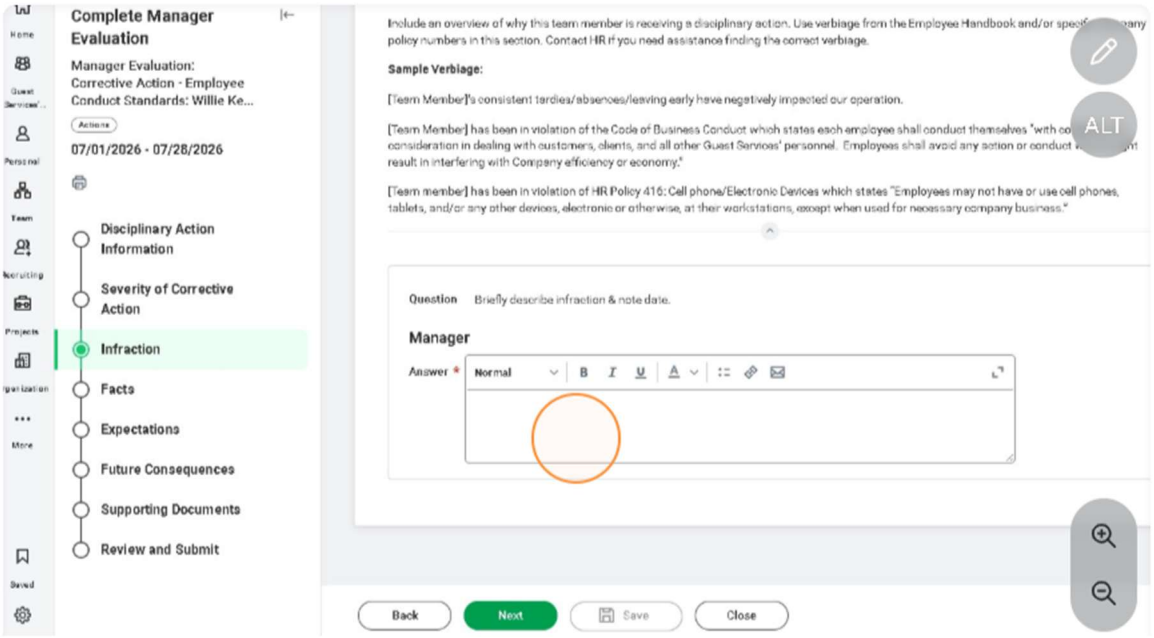
19 Comments are not required at this stage. Click "Next"



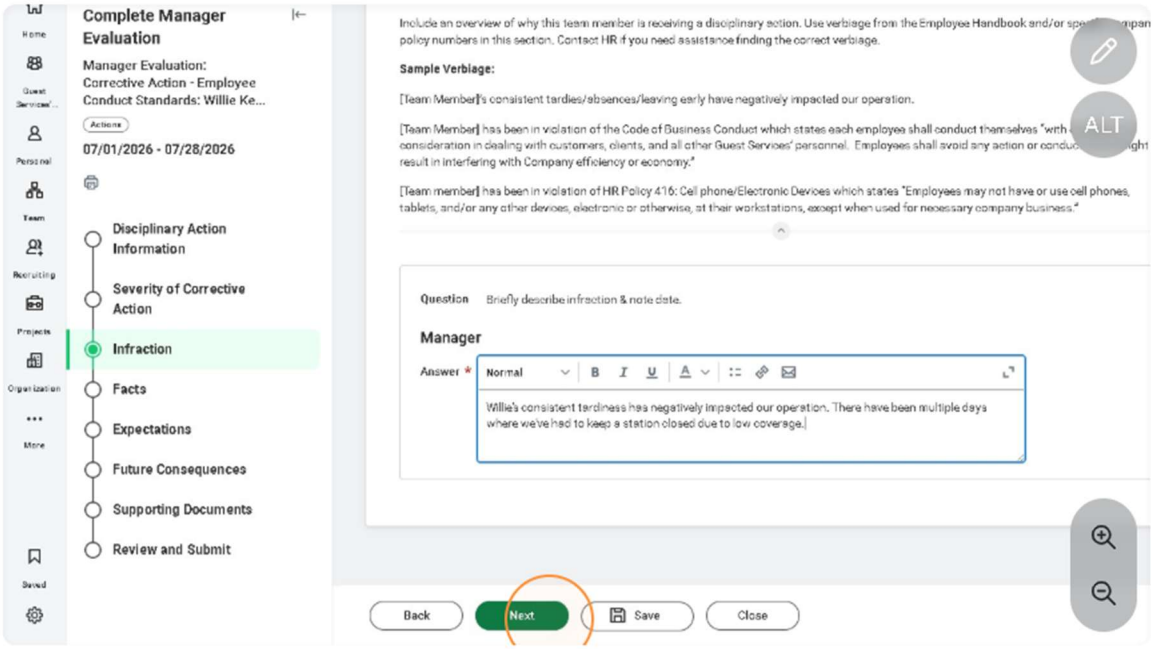
20 Be sure to refer to the help text at each step.



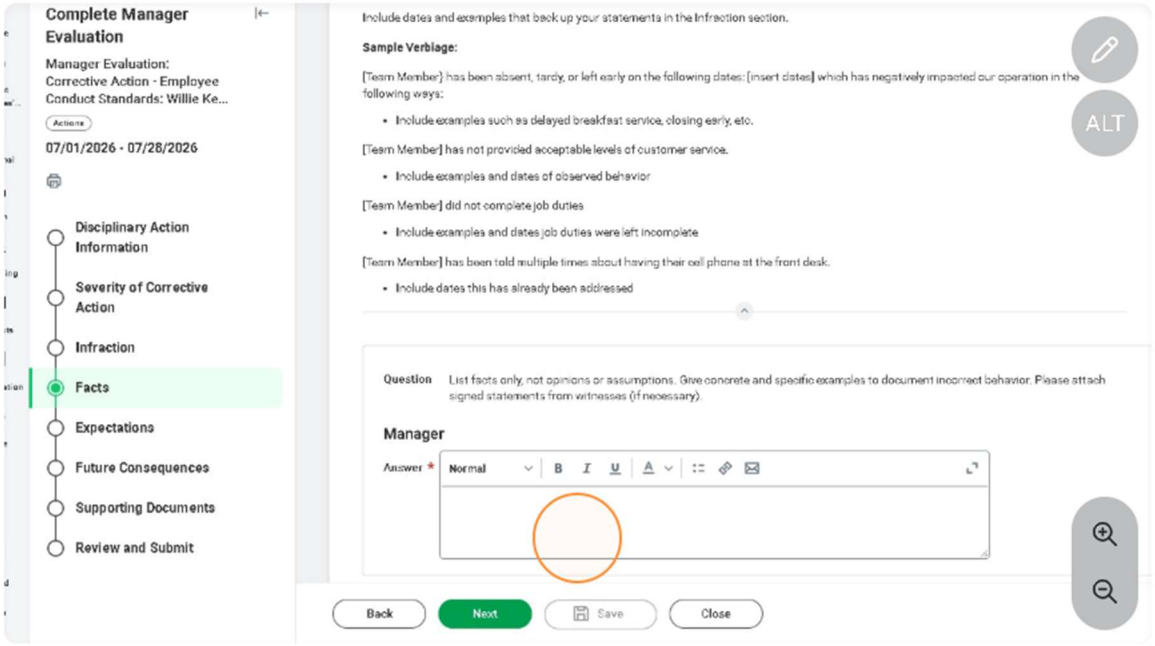
21 Comments are required in this section. Include an overview of why the team member is receiving the corrective action.



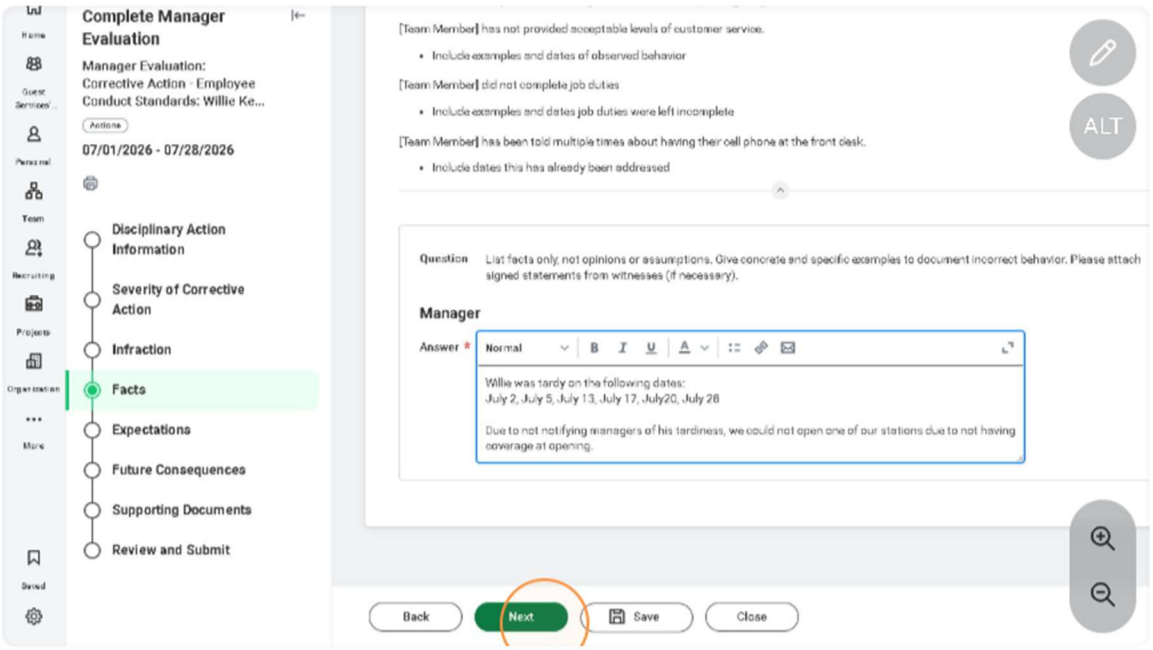
22 Click "Next"



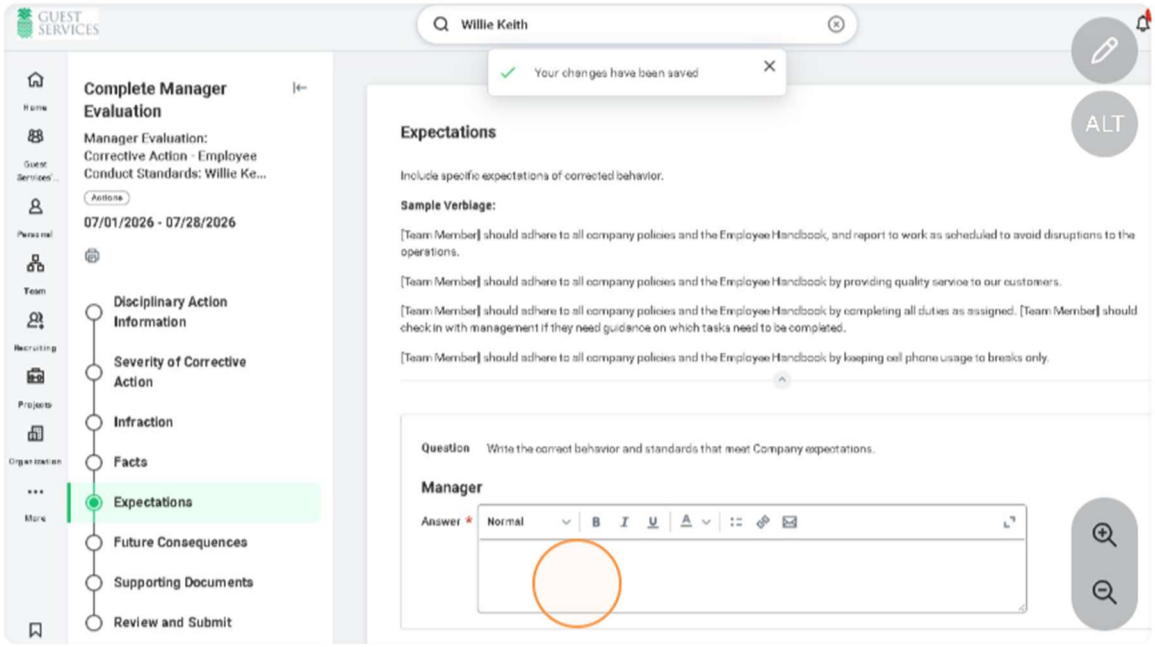
23 Comments are required in this section. Include dates and examples that corroborate your statements in the Infraction section.



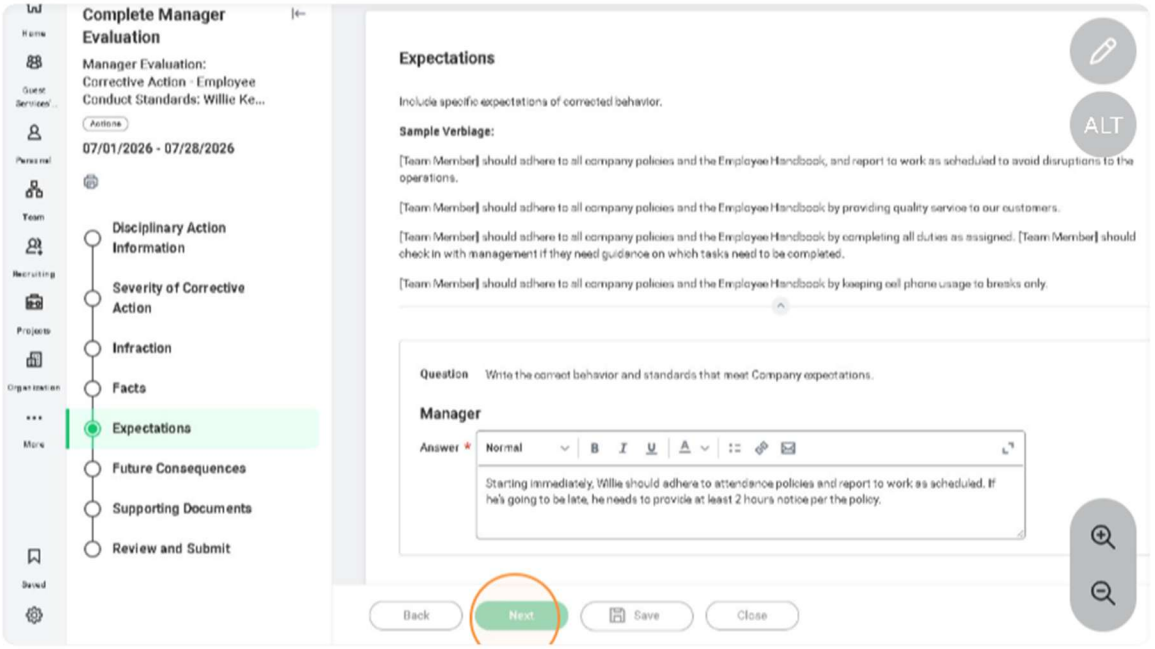
24 Click "Next"



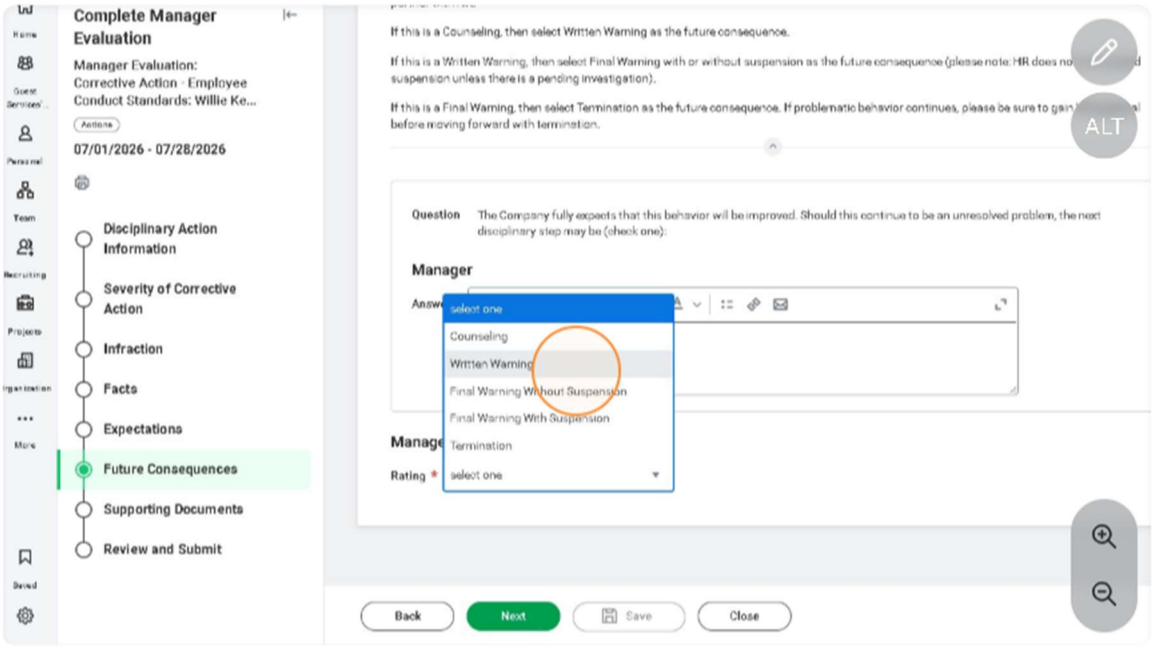
25 Comments are required in this section. Include specific expectations of corrected behavior.



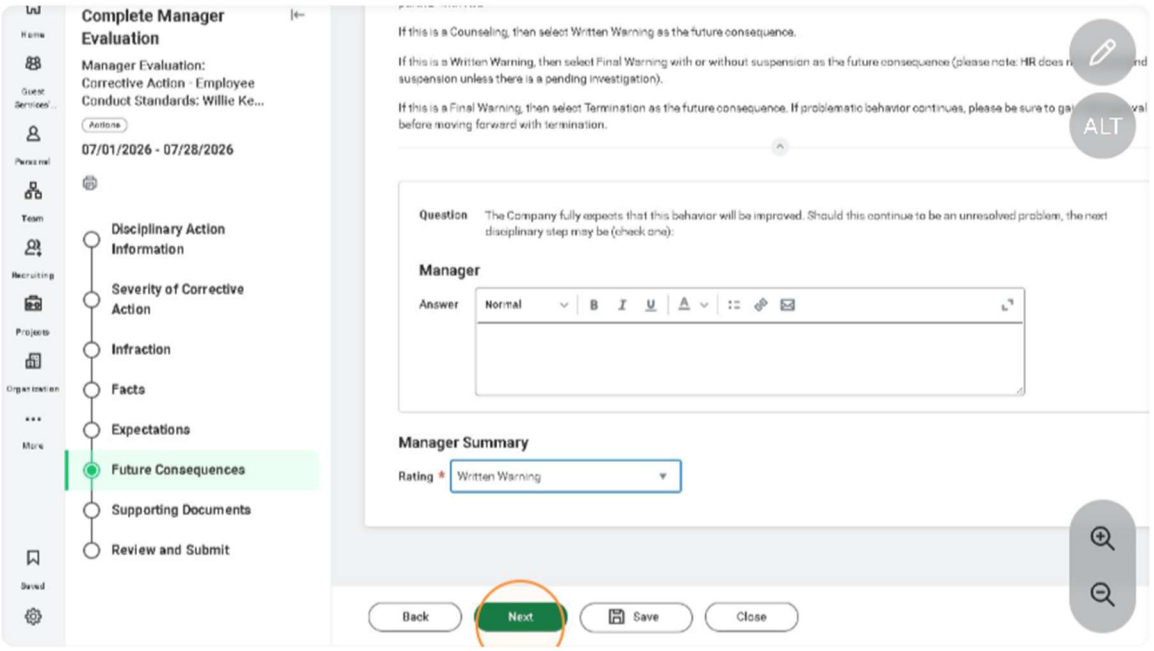
26 Click "Next"



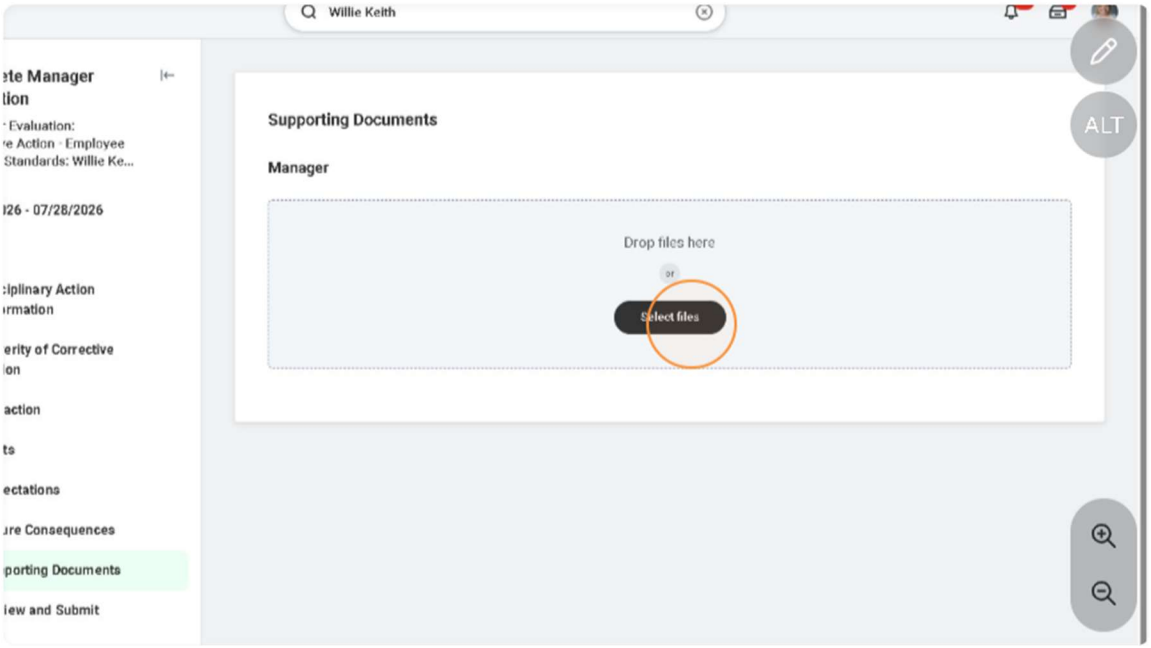
27 Select the appropriate rating. Be sure to refer to the help text. This rating should be the next step in the process that will happen if behavior is not corrected. Comments are not required.



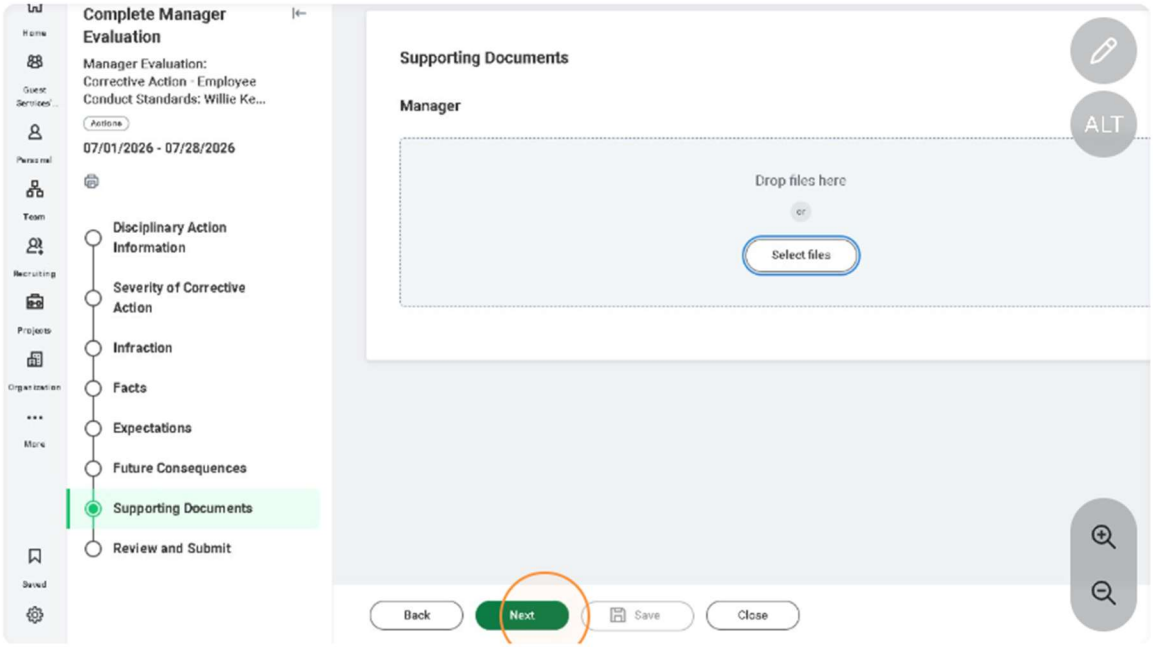
28 Click "Next"



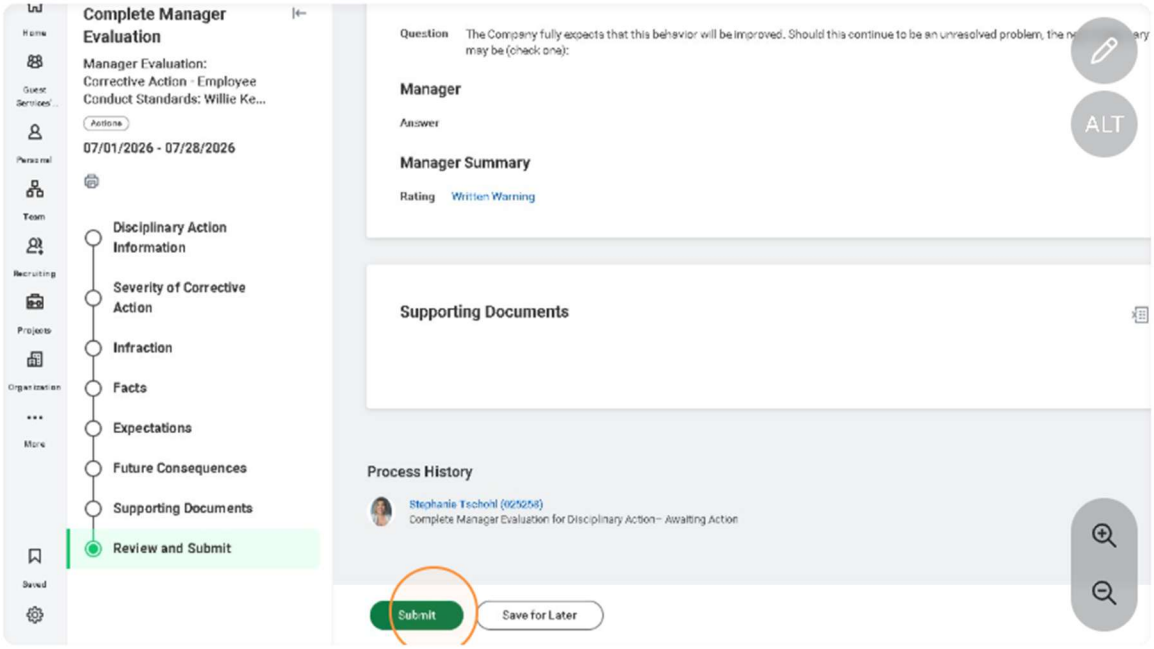
29 If you have corroborating statements, customer comments, or any additional supporting documents, add them here. Anything attached will not be visible to the team member when they acknowledge, but will be available to HR when reviewing the corrective action.



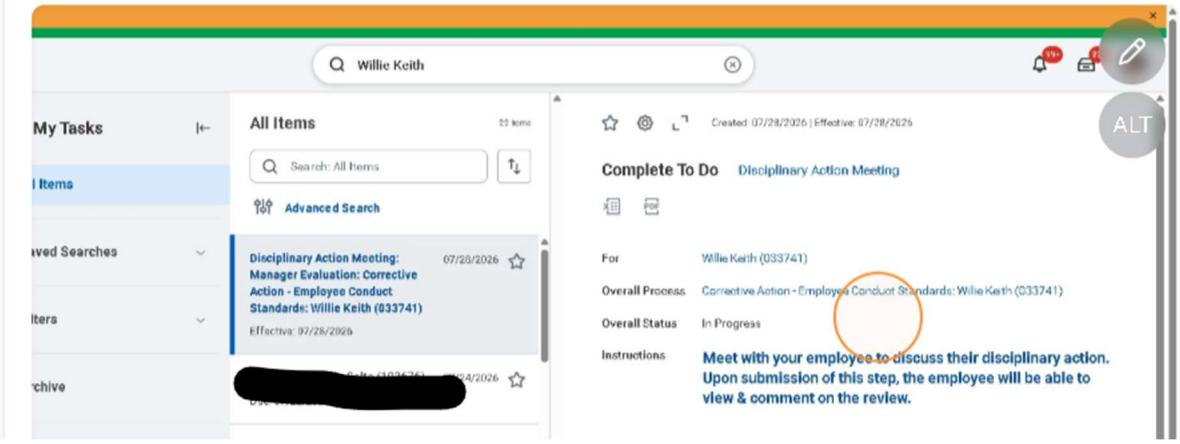
30 Click "Next"



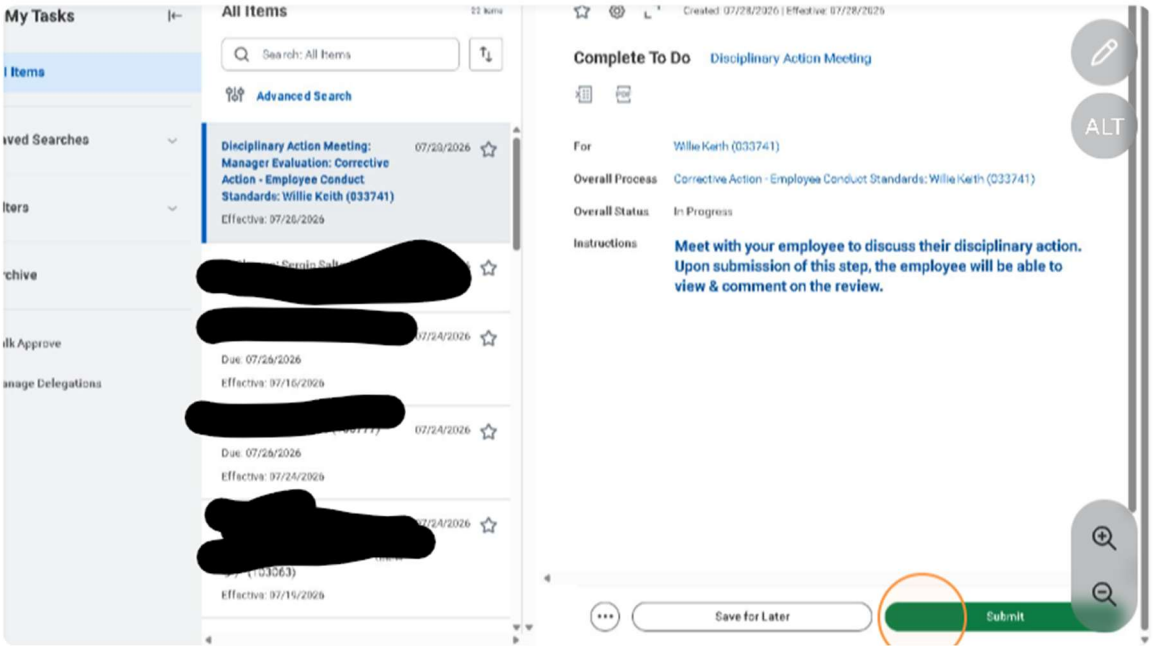
31 Click "Submit" The Corrective action will now go to the HR team. They will review and either approve or send back with notes.



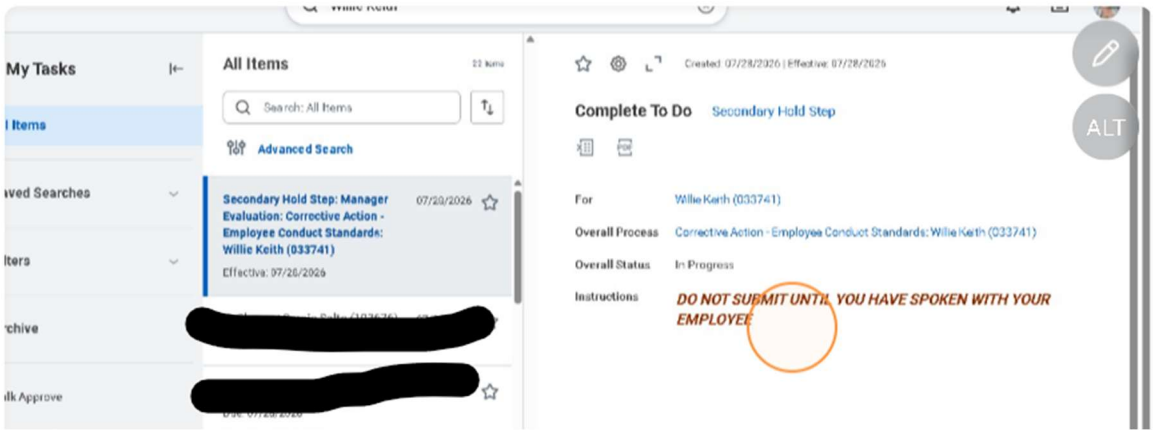
32 Once approved by HR, the corrective action will appear in your Workday inbox in a hold step. Please meet with the team member prior to submitting this hold step.



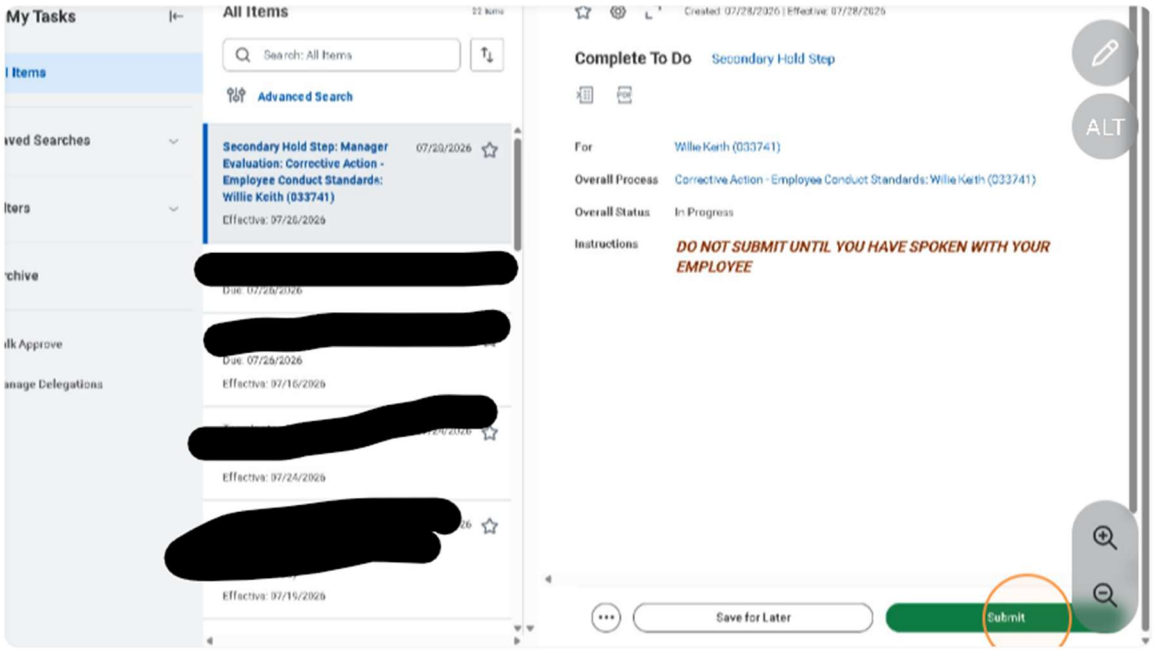
33 Once you meet with your team member, Click "Submit"



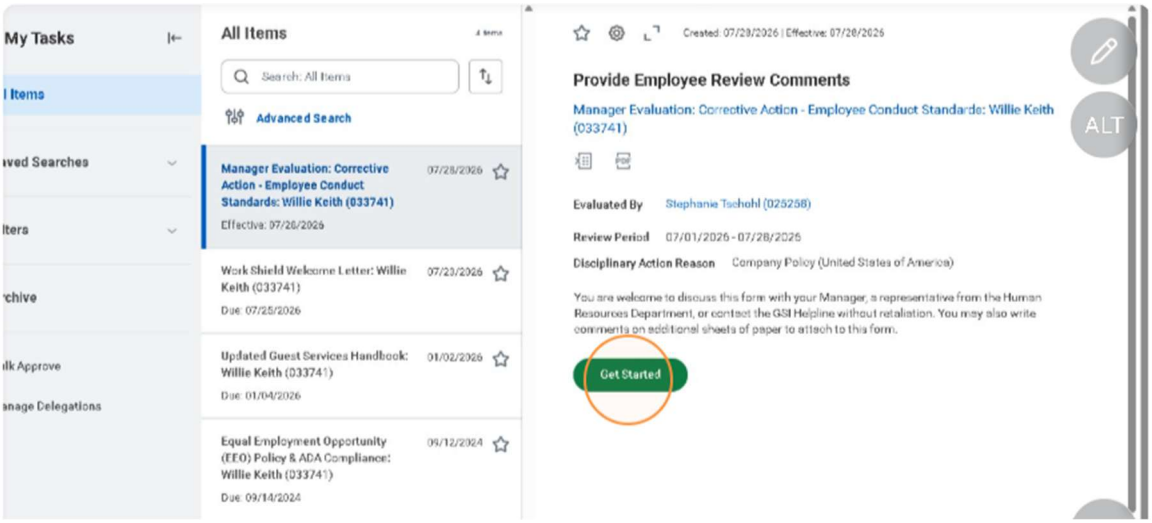
34 We've built in a secondary hold step.



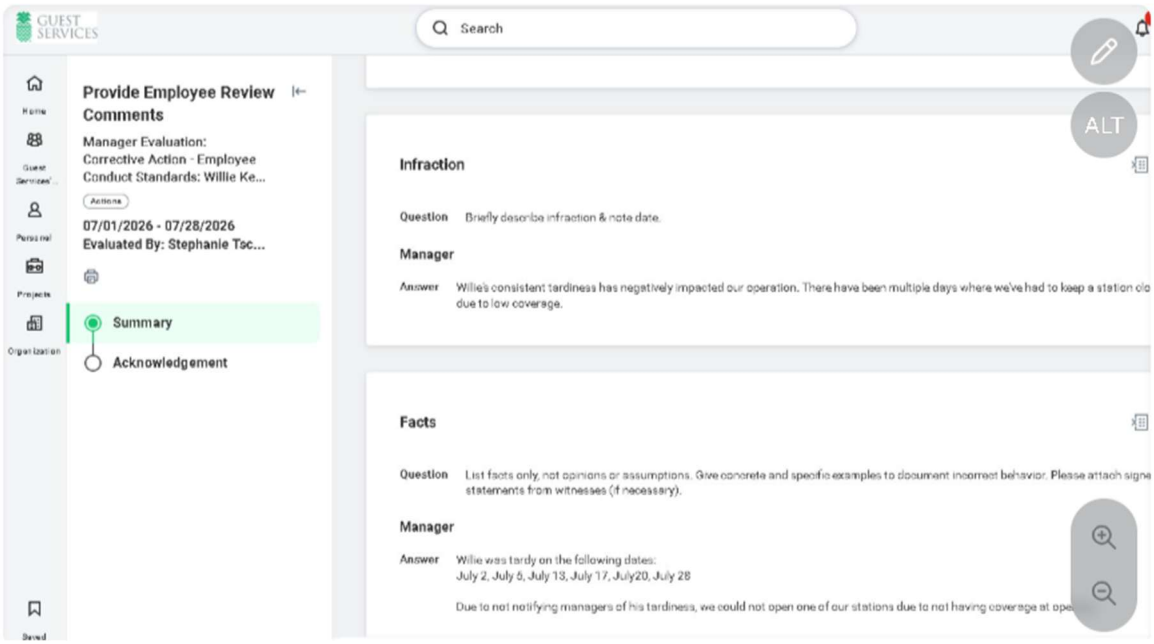
35 Click "Submit" after you've spoken with the team member. This will send the corrective action to the team member's workday inbox for acknowledgement.



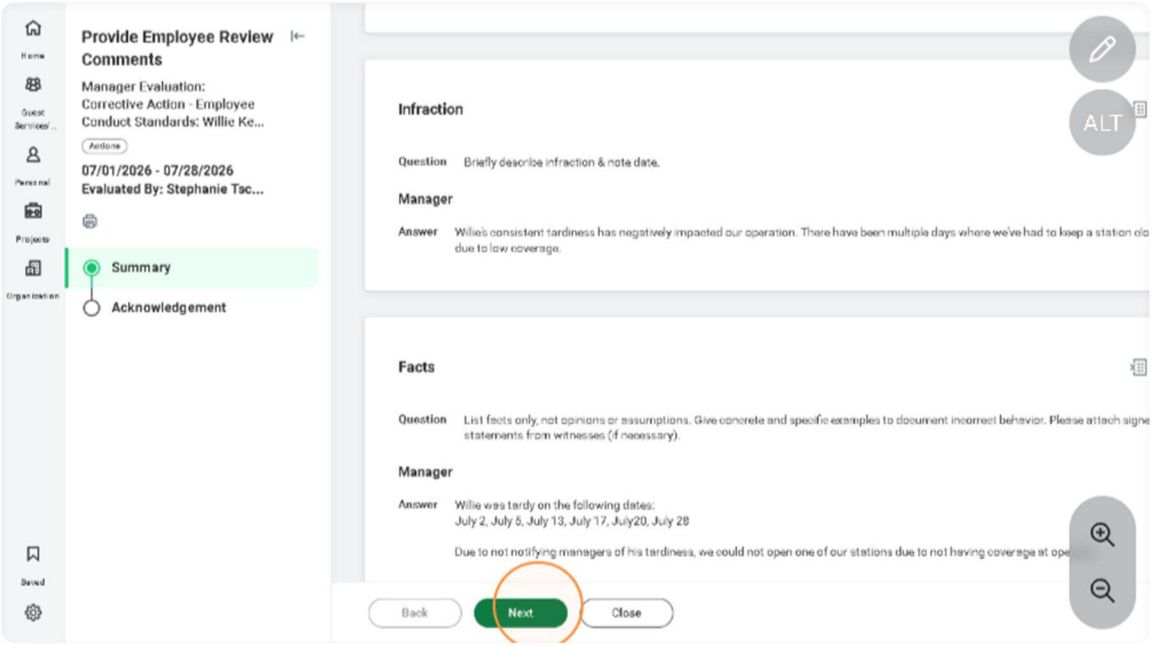
36 Once the team member receives the task, they will Click "Get Started"



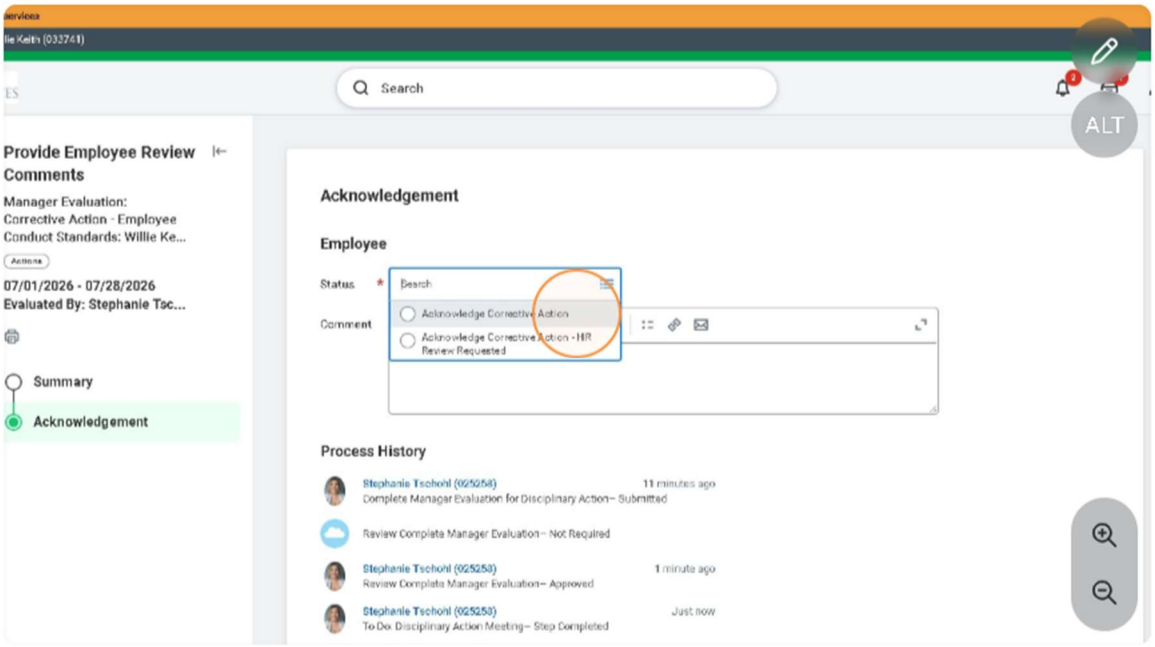
37 They can review a summary of what was discussed.



38 They will Click "Next"



39 They will select the appropriate option. Comments are not required. If the team member selects HR Review Requested, the corrective action will go back to HR and HR will reach out to the team member. If the team member does not select HR Review, but does add comments, the corrective action will go back to HR to review the comments and determine if additional follow up is necessary.



40 The team member will Click "Submit"

