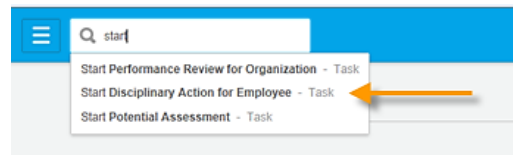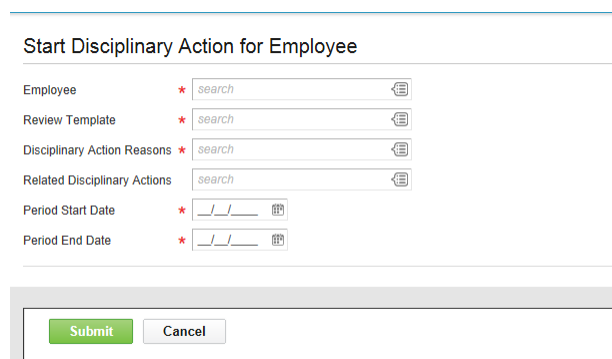## DISCIPLINARY ACTION TRACKING

This process has been developed to allow for the tracking of disciplinary actions in Workday. The initial process allows only HR to initiate disciplinary action tracking in Workday and the uploading of related documents. Disciplinary action information can be viewed by the HR partner and supervisor. The intent is for employees to be able to view their disciplinary action information in Workday. This is currently being configured.

Here are the steps which must be followed:

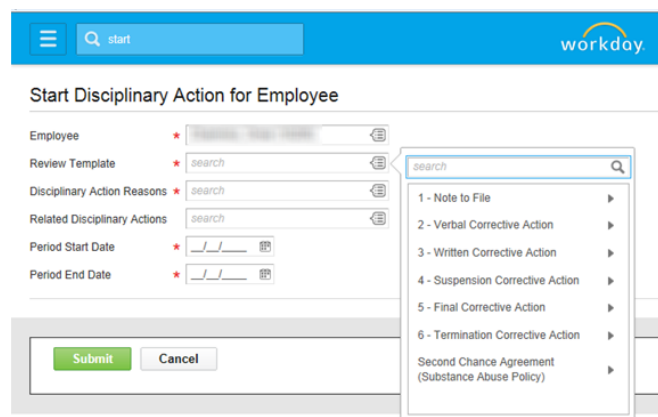1. Type **Start Disciplinary Action** for **Employee** in the search bar.

2. Populate all fields with the **red ***.

3. Select the appropriate level of disciplinary action in the **Review Template** field.

   Note: Some options may not be applicable at your location.

4. Select the applicable reason in **Disciplinary Action Reasons** field.

Helpful Tips

> *Note*: The reason selections were based on common infractions of company policy. The list was not meant to be all inclusive and additional reason categories can be added.

5. Enter the appropriate start and end date of the disciplinary action. Click **Submit**

6. To attach a document click on Open – Complete Manager Evaluation. If you do not want to attach a document, click **Done**. The following instructions assume documents will be added. Adding documents is a local decision. It is not a requirement.

Helpful Tips

> *Note*: Supervisors and, when configured, employees will be able to view attached documents.

7. Click on the **Go to Summary Editor** button.

8. Click on the (⊕) sign. You will be able to attach related disciplinary documents.

Attach Supporting Documents by clicking on the "+" below

Manager   ⊕

[Submit] [Save for Later] [Close]

9. Upload a document and add comments, if appropriate. Click [Submit] .

Helpful Tips

   Note: Comments are viewable by Supervisors and, when configured, Employees.

Complete Manager Evaluation Manager Evaluation: Final Corrective Action:

Review Period
10/24/2014 - 10/25/2015

Disciplinary Action Information   [Guide Me]

Disciplinary Action Information   Disciplinary Action Reason   Attendance (United States of America)
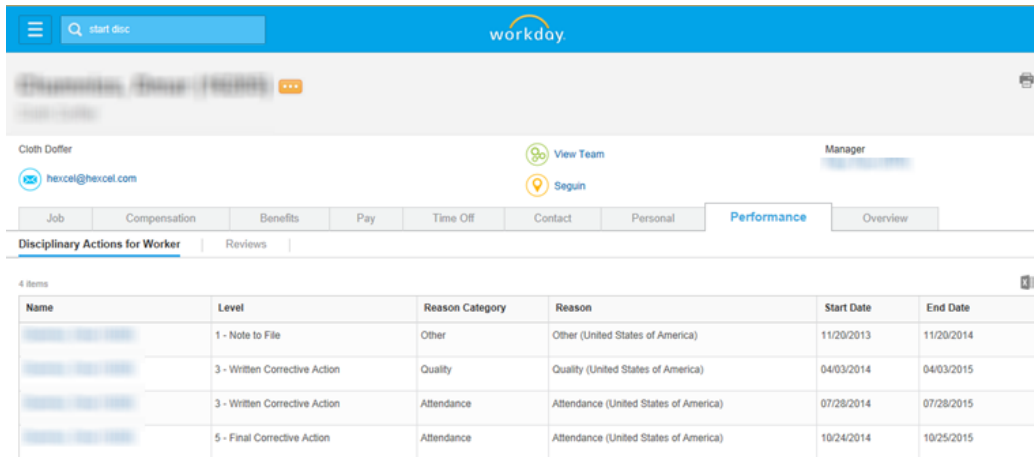
Attach Supporting Documents by clicking on the "+" below   [Guide Me]

Manager   ⊕

   Evaluation Supporting Document   (empty)   File   [Attach]   Updated By   (empty)   Upload Date   (empty)   ↺ Undo ☑
   Comment

[Submit] [Save for Later] [Close]   View Comments (0)
                                                                      Process History
                                                                      Related Links

10. Disciplinary actions are viewable under the Employee's Performance tab.

11. Disciplinary action reports are available by worker and location.

Date	Chapter Modified
16 Dec 2104	*Modified numbering to not duplicate with another chapter. Added revision date in footer. DLB*
20 April 2015	*Modified screen captures to blur out names of Employee, Supervisor, etc…DLB*