

Corrective Action – Affiliate – **NEED TO UPDATE**

Process: Corrective Action

Action done by: Manager

Visibility: Manager,
HR Admin, HR Talent Admin, HR Partner

Used by RHLICA, NC, NM, TN

Overview:

Use this process when an employee needs Corrective Action.

Manager Creates a Corrective Action

Manager starts the process:
Select the employee's profile and
select **Actions** → **Talent** → **Start
Corrective Action**

A screenshot of a navigation menu. On the left, there are several categories: 'Actions', 'Frequently Used', 'Compensation', 'Job Change', 'Recruiting', and 'Talent'. The 'Talent' category is expanded, showing a list of options. 'Start Corrective Action' is highlighted in blue, and an orange arrow points to it from the right.

- Give Feedback
- View Feedback
- View Feedback by Request
- View Feedback Given to Others
- View Goals
- View Development Items
- View Skills and Experience
- View Interests
- View Employee Reviews
- Start Development Plan
- Start Corrective Action**
- Start Performance Improvement Plan
- Add Personal Note
- View Manager Check-Ins

A screenshot of a form titled 'Start Corrective Action for Employee'. The form has several fields with red asterisks indicating required fields. The 'Employee' field is a dropdown menu showing 'Disciplinary Action'. The 'Review Template' field is a dropdown menu with 'Corrective Action Required (United States of America)' selected. The 'Corrective Action Reasons' field is a search box with 'Corrective Action Required (United States of America)' listed below it. The 'Related Corrective Actions' field is a search box. The 'Period Start Date' and 'Period End Date' fields are date pickers. At the bottom, there are 'Submit' and 'Cancel' buttons.

Start Corrective Action for Employee

Employee *

Review Template * Corrective Action Required (United States of America)

Corrective Action Reasons *

Related Corrective Actions

Period Start Date *

Period End Date *

Complete Manager Evaluation

Complete Manager Evaluation

Manager Evaluation: Corrective Action:



Created: 10/08/2023 | Effective: 10/10/2023

Get Started

Complete Manager Evaluation

Manager Evaluation:
Corrective Action: 1

Actions

10/10/2023 - 10/10/2023



- Corrective Action Information
- Corrective Action Level
- Description of Incident
- Union Representation
- Comments
- Supporting Documents
- Review and Submit

Corrective Action Information

Corrective Action Reason Corrective Action Required (United States of America)

Back

Next

Close

Add the Correct Action Level

Corrective Action Level

Question Violation:

Manager

Rating * select one

select one

Answer * Informal Counseling

Verbal Warning

Written Warning

Level 1 Suspension

Level 2 Suspension

Termination

Description of Incident

Question Description of Incident (include date(s) and all relevant information):

Manager

Answer *

Normal

B

I

U

A

☰

🔗

Summary of the key points



Back

Next

Save for Later

Close

Union Representative

Select Accepted or Declined regarding Union rep. Add notes if necessary

Union Representation

Question Union Representative Offered:

Manager

Rating * is not a value.

Manager S

Accepted

Declined

Comment

Format **B** **I** **U** **A**

[Back](#) [Next](#) [Save for Later](#) [Close](#)

Comments

Please enter any comments below.

Manager

Comment

Normal **B** **I** **U** **A**

Additional comments...

[Back](#) [Next](#) [Save for Later](#) [Close](#)

Add Comments or Supporting Documents

Supporting Documents

Manager

Drop files here

or

Select files

Manager Summary

Comment

Normal | B | I | U | A | [List Icon] | [Link Icon]

Add documents if needed

Back Next Save for Later Close

Submit

-Manager to submit corrective action request.


-Next HR Partner to review/approve (email and notification)

The image shows a screenshot of a Workday interface. On the left, there is a form titled "Corrective Action Information" with a dropdown menu for "Corrective Action Reason" set to "Corrective Action Required (United States of America)". Below this is another section titled "Corrective Action Level" with a dropdown for "Question" set to "Violation:". Underneath, there is a "Manager" section with a dropdown for "Rating" set to "Informal Counseling" and a dropdown for "Answer" set to "Summary of the key points". At the bottom of the form are two buttons: "Submit" (in a blue circle) and "Save for Later" (in a white rounded rectangle).

To the right of the form is an email notification. The subject line is "[External] A Task Awaits You: Approval by HR Partner - Corrective Action:". The sender is "rhsc@myworkday.com" with a profile picture of a red circle containing a white "R". The recipient is "HRISTesting". There are "Reply" and "Reply All" buttons. Below the email header is a blue information icon with the text: "If there are problems with how this message is displayed, click here to view it in a web browser." The main body of the email says: "Please log into the Workday system to complete this action." followed by a blue link: "Click here to view the notification details." and a final line: "This email box is not monitored. Please do not reply to this message." At the bottom of the email is the Workday logo.



HR Partner Review

MENU 

Q Search

We've Improved Our Navigation Experience!

It's now easier to find, add, and remove apps and shortcuts directly in the menu.

[Start the Tour](#) [Skip for now](#)

- Corrective Action Information
- Corrective Action Level
- Description of Incident
- Union Representation
- Comments
- Supporting Documents
- Summary

>

Corrective Action Information

Corrective Action Reason [Corrective Action Required \(United States of America\)](#)

Corrective Action Level

Question Violation:

Manager

Rating [Informal Counseling](#)

Answer [Summary of the key points](#)

[Approve](#) [Send Back](#)

Manager Review

Review Manager Evaluation: Corrective Action:



Created: 10/08/2023 | Effective: 10/10/2023

Get Started

Awaiting Your Action



Disciplinary Action Review: Manager Evaluation: Corrective Action

My Tasks - 29 second(s) ago

Complete To Do Disciplinary Action Review



Created: 10/08/2023 | Effective: 10/10/2023

For

Overall Process Corrective Action:

Overall Status In Progress

Instructions

- Please have a conversation with your employee about the disciplinary incident and outline a plan of action to monitor improvement and/or close out the plan. Please note, once you submit this task the review will be visible to the employee.

1 item



File Name	Type	File	Created by	Date and Time Created
...	10/08/2023

Submit

Save for Later

Close

Once the "Submit" button is hit, the form will be visible to the employee.

Employee Review

Provide Employee Review Comments

[Manager Evaluation: Corrective Action:](#)

Created: 10/26/2023 | Effective: 10/26/2023

The employee assistance program can provide confidential counseling services to assist participants in dealing with both workplace and non-workplace issues. This benefit is available to you free of charge by calling 1-800-634-6433.

Get Started

Acknowledgement

Employee

Status * Search

Comment

Employee signature acknowledges that the discussion regarding the employee's performance occurred and does not imply agreement or disagreement with the appraisal

Employee reviews and acknowledges the corrective action.

The employee may add comments.



Adding an Additional Corrective Action

In the event that two separate, corrective actions are needed for the same day, an “additional corrective action” may be chosen.

Start Corrective Action for Employee

Employee *

Review Template *

Corrective Action Reasons *
 Corrective Action

Related Corrective Actions

Period Start Date *

Period End Date *