

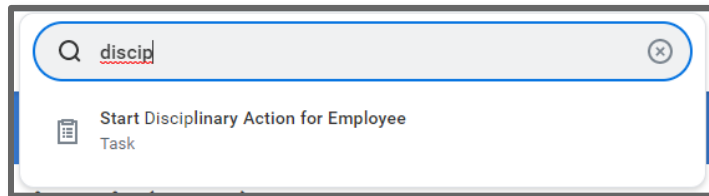
# Talent Management: Disciplinary Action

If you need to address a performance issue with your direct report, the first step is to initiate a **Disciplinary Action (DA)** in Workday.

After you've submitted the DA, you may be prompted to take additional actions in Workday such as submitting a Performance Improvement Plan or a Termination.

## INITIATING THE DISCIPLINARY ACTION

1. In the Workday search bar, type **disciplinary**. You want to choose the first option:



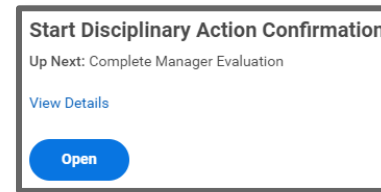
2. Type the worker's name in the **Employee** field and hit Enter.
3. Choose **Disciplinary Action** from the drop down menu for **Review Template**.
4. Choose the correct reason(s) from the drop down menu for **Disciplinary Action Reasons**.
5. If there are existing DAs that are related to the incident you are documenting, choose them from the drop down menu for **Related Disciplinary Actions**.
6. The **Period Start Date** is the date when you are initiating the disciplinary action. Use the same date for the **Period End Date** field.
7. Click **Submit**.

## DOCUMENTING THE INCIDENT

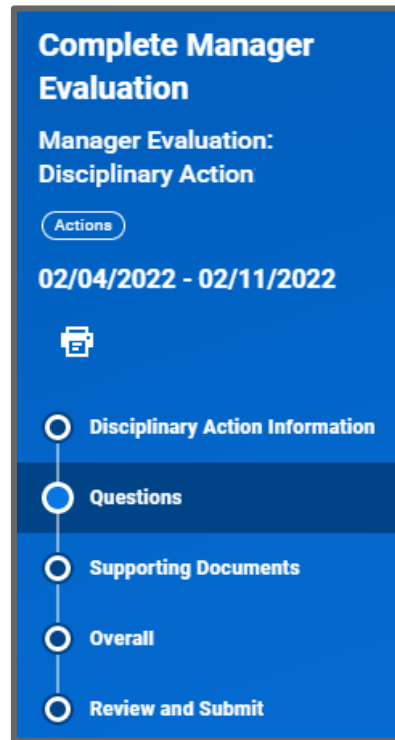
1. You will see a pop-up window. Click **Open**.



**Note:** If at any point you have questions or need assistance, please contact your **Employee Relations Specialist**.



2. Review the information on the screen then select **Get Started**.



3. Click **Next** to get to the **Questions** section.
4. Review each question and provide a detailed response in the area provided labeled **Answer**.
5. Click **Next** to get to the **Supporting Documents** section.
6. If you have documents to include, attach them here. If the worker is a Union employee and has elected for Union representation during this process, please attach a document with that individual's signature here.
7. Click **Next** to get to the **Overall** section.

# Talent Management: Disciplinary Action



**Note:** HR can make edits, Approve, Send Back, or Deny the Disciplinary Action. If it is sent back to you, there will be comments at the very bottom of the screen.

8. Here is where you identify the outcome of the disciplinary action. Choose the appropriate selection from the **Rating** dropdown menu. For guidance, a **Rating Description** appears when you make your selection to aid you in choosing the correct outcome.

**Overall**

Select appropriate disciplinary action level. Consult with your Employee Relations Specialist or HR Business Partner to identify the appropriate level.

**Manager**

Rating \* Termination – Eligible for Rehire

Rating Description This is the final level of disciplinary action. The employee is no longer employed by Geisinger and all benefits and pay associated with employment cease. The employee is eligible for rehire.

9. Click **Next** to get to the **Review and Submit** section. Review your responses in detail; if changes are needed, click on the appropriate section in the blue left-hand menu. Otherwise, click **Submit**.
10. At this point, it will route to **HR** to review. If this is an urgent situation, please reach out to your Employee Relations Specialist for immediate assistance.

## Success! Event submitted

Up Next: Tara Petroski (50902), Review Complete Manager Evaluation, Due Date 02/06/2022  
[View Details](#)

## MEETING WITH THE EMPLOYEE

1. After HR approves, you will get a Workday inbox task to discuss with your employee. Review the instructions and complete the task.

Once you click **Submit**, the Employee can see the **Disciplinary Action in Workday**.

**Inbox**

Actions Archive

Viewing: All Sort By: Newest

Discuss Performance: Manager Evaluation: Disciplinary Action  
1 minute(s) ago - Effective 02/11/2022

**Complete To Do** Discuss Performance

1 minute(s) ago - Effective 02/11/2022

For

Overall Process Disciplinary Action:

Overall Status In Progress

Instructions **Please discuss the above event with your employee**

To see the document to review during the discussion:  
1. Click on the **Overall Process** link above  
2. Click on the **Business Process**

2. The Employee will receive a Workday inbox task to acknowledge the Disciplinary Action. **Please encourage them to log into Workday during your discussion to submit their task.**

## NEXT STEPS

**For Verbal Warnings, Written Warnings and Suspensions**, you will get a task in your Workday inbox reminding you to create a [Performance Improvement Plan](#).

## Talent Management: Disciplinary Action

**For Terminations**, you'll get a task in your Workday inbox reminding you to submit the [Termination](#). **Ensure the Eligibility for Rehire** on the termination matches what was selected on the Disciplinary Action.

Additionally, you may need to submit Access Suspension per the **Terminations/Suspensions** section at the bottom of the [HR Manager Toolkit](#).