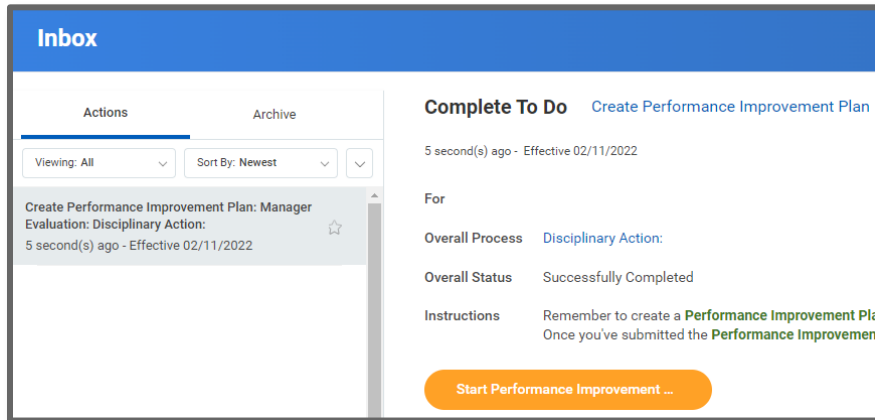


Talent Management: Performance Improvement Plan

After you submit a **Disciplinary Action (DA)** in Workday for a direct report, you may be prompted to create a **Performance Improvement Plan (PIP)**.

INITIATING THE PERFORMANCE IMPROVEMENT PLAN

1. After you completed the Disciplinary Action, you'll have gotten a To Do in your Workday Inbox:



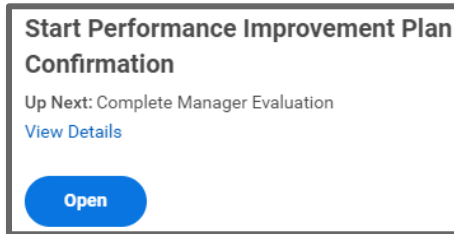
2. Click the orange button labeled **Start Performance Improvement....**
3. Type the worker's name in the **Employee** field and hit Enter.
4. Choose **Performance Improvement Plan** from the drop down menu for **Review Template**.
5. The **Period Start Date** is the date when you are initiating the disciplinary action. Use the same date for the **Period End Date** field.
6. Click **Submit**.

DOCUMENTATION

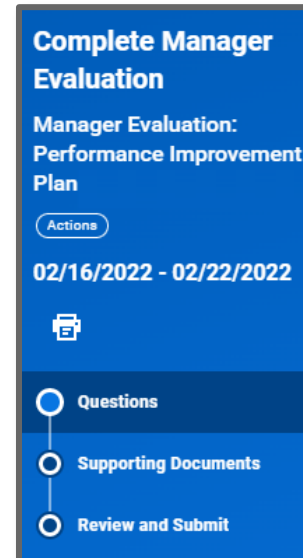
1. You will see a pop-up window. Click **Open**.



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. Review each question and provide a detailed response in the area provided labeled **Answer**.
4. Click **Next** to get to the **Supporting Documents** section.
5. If you have documents to include, attach them here.
6. 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**.

7. At this point, it will route to **HR** to review.



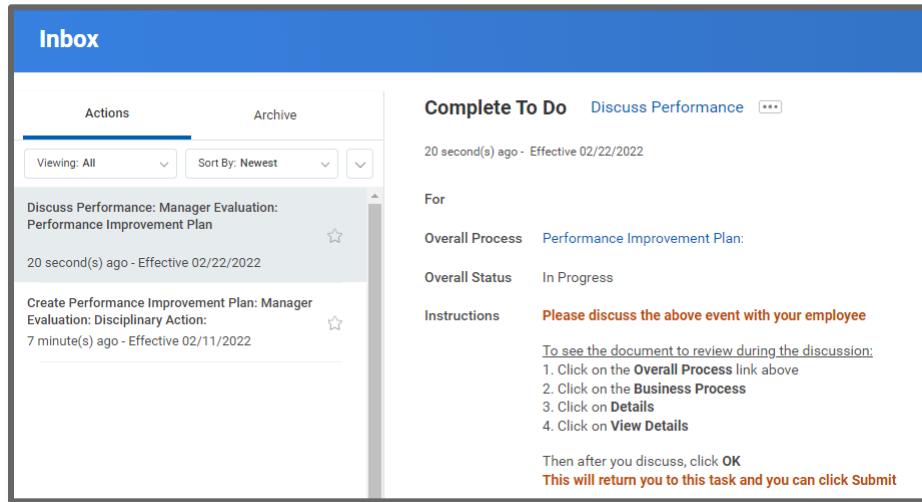
Note: HR can make edits, Approve, Send Back, or Deny the Performance Improvement Plan. If it is sent back to you, there will be comments at the very bottom of the screen.

Talent Management: Performance Improvement Plan

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 Performance Improvement Plan in Workday.



2. Ensure you revisit the original To Do that started this process and click **Submit** on that task as well.
3. The Employee will receive a Workday inbox task to acknowledge the Performance Improvement Plan. **Please encourage them to log into Workday during your discussion to submit their task.**