Talent Management: Performance Improvement Plan

A **Performance Improvement Plan (PIP)** is used to document an employee's performance deficiencies and identify steps and

resources to be taken for improvement.

INITIATING THE PERFORMANCE IMPROVEMENT PLAN

1. To begin, you can select "Initiate a Performance Improvement Plan" from the Actions menu in the employee profile, located in the Talent Management section. Alternatively, in the Workday search bar, you can type **start performance improvement**. You want to choose Start Performance Improvement Plan:



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

| Complete Manager Evaluation |
|--|
| Manager Evaluation: Performance Improvement Plan |
| Actions 02/16/2022 - 02/22/2022 |
| 8 |
| Questions |
| Supporting Documents |
| O Review and Submit |

- **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.
- 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.

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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 for the Discuss Performance task, the Employee can see the Performance Improvement Plan in Workday.

| Inbox | | | |
|--|---|--|---|
| Actions Archive Viewing: All Viewing: All | ~~ | Complete To Do Discuss 20 second(s) ago - Effective 02/22/2022 | Performance ••• |
| Discuss Performance: Manager Evaluation: Performance Improvement Plan 20 second(s) ago - Effective 02/22/2022 Create Performance Improvement Plan: Manager Evaluation: Disciplinary Action: 7 minute(s) ago - Effective 02/11/2022 | nce: Manager Evaluation: overment Plan Effective 02/22/2022 ce Improvement Plan: Manager inary Action: ffective 02/11/2022 | For Overall Process Performance Imp Overall Status In Progress Instructions Please discuss th | rovement Plan: le above event with your employee |
| | | 10 see the docum 1. Click on the Ow 2. Click on the Bu 3. Click on Details 4. Click on View D Then after you dis This will return yo | ent to review during the discussion; erall Process betails scuss, click OK su to this task and you can click Submit |

 The Employee will receive a Workday inbox task to acknowledge the Performance Improvement Plan and add any comments.
 Please encourage them to log into Workday during your discussion to submit their task.

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