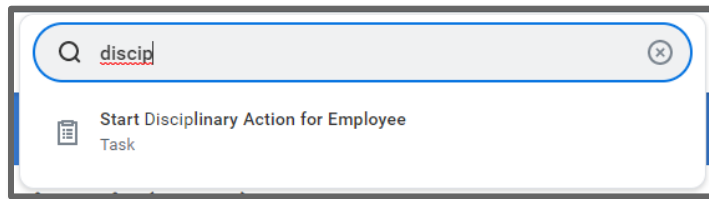


Talent Management: Disciplinary Action

A **Disciplinary Action (DA)** may be used to address a work performance or conduct concern with a member of your team. Follow the steps below to initiate a Disciplinary Action (DA) in Workday.

INITIATING THE DISCIPLINARY ACTION

1. To begin, you can select “Initiate a Disciplinary Action” from the Actions menu in the employee profile, located in the Talent Management section. Alternatively, in the Workday search bar, you can type **disciplinary**. You want to choose Start Disciplinary Action:



2. Type the worker’s name in the **Employee** field and hit Enter.
3. Choose the **Disciplinary Action** template from the drop-down menu for **Review Template**.



Note: The template will be called Union Disciplinary Action or Non-Union Disciplinary Action, which is displayed based on the employee’s union-covered status

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**.



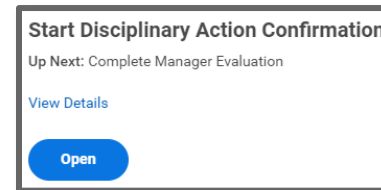
Note: If at any point you have questions or need assistance, please contact your **Employee Relations Specialist**.

field.

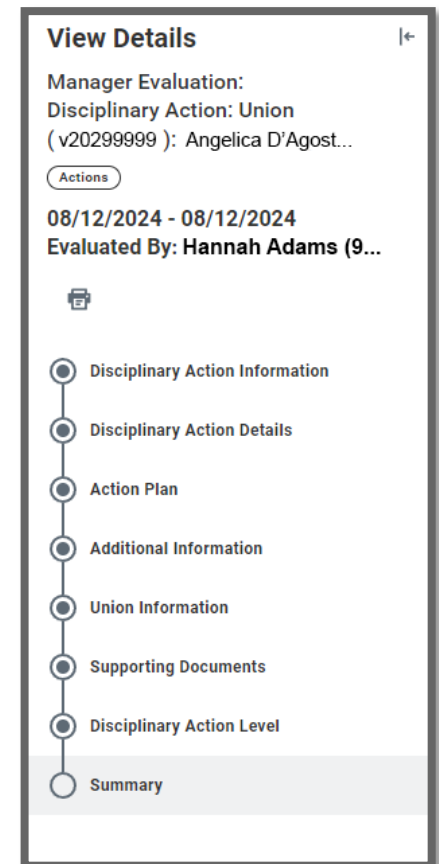
7. Click **Submit**.

DOCUMENTING THE INCIDENT

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



2. Review the information on the screen then select **Get Started**.
3. Click **Next** to get to the **Disciplinary Action Details** section.
4. Review each question and provide a detailed response in the area provided labeled **Answer**.
5. Click **Next** to get to the **Action Plan** section and answer each question.



Talent Management: Disciplinary Action

6. Repeat these steps on the **Additional Information** section and the **Union Information** section (if applicable).
7. Click **Next** to get to the **Supporting Documents** section.
8. If you have documents to include, attach them here.
9. Click **Next** to get to the **Disciplinary Action Level** section.
10. Here is where you identify the level 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 assist you.

Disciplinary Action Level

Select appropriate disciplinary action level. The Disciplinary Action process is typically progressive in nature; however, depending upon the severity of the issue, disciplinary steps may be bypassed. Refer to the Performance Improvement Procedure & Policy or 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.

11. 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**.
12. 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: Candace Bergen (99999), Review Complete Manager Evaluation, Due Date 02/06/2022

[View Details](#)



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.

Talent Management: Disciplinary Action

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.

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

NEXT STEPS

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 remove employee access. Refer to the Immediate Suspension instructions in the **Terminations/Suspensions** section at the bottom of the [HR Manager Toolkit](#).

The screenshot shows a Workday task interface. On the left, a sidebar lists 'All Items' with a search bar and a link to 'Advanced Search'. Below this, a task card is visible: 'Discuss Disciplinary Action: Manager Evaluation: Disciplinary Action: Non-Union (v20299999): John Zinner (99999)' with an effective date of 08/14/2024. The main content area shows the task details: 'Complete To Do' is 'Discuss Disciplinary Action', 'For' is 'John Zinner (99999)', 'Overall Process' is 'Disciplinary Action: Non-Union (v20240809): James Elmore (568)', and 'Overall Status' is 'In Progress'. The 'Instructions' section states: 'Please meet with your employee to discuss the Disciplinary Action.' Below this, it says 'To see the Disciplinary Action to review during the discussion:' followed by a bulleted list: 'Select the Settings icon at the top of this task ("cog")', 'Select View Details from the options list', 'Click the Details tab', 'Click on View Details button', 'After meeting with the employee, click OK to return to this task', and 'Click Submit'. An 'IMPORTANT REMINDERS' section follows with three bullet points: 'Please keep your notes from the disciplinary meeting in your investigation file for this Disciplinary Action.', 'Remind employee that Written Warnings and above may result in ineligibility for future salary increases, incentives, retention bonuses and/or transfers for a period of six months from issue date (if applicable).', and 'When meeting with a union eligible employee, please print this document, indicate whether a union representative was present or declined by the employee, and have all parties sign the bottom of the document. Please forward the signed document to HR promptly.' The final bullet point states: 'When terminating an employee, please print this document and have all parties present sign the bottom of the document. Please forward the signed document to HR promptly.' and includes a link to 'Printing Instructions.' At the bottom of the task area are three buttons: 'Submit' (orange), 'Save for Later', and 'Close'.