

HOW TO DOCUMENT COACHINGS IN WORKDAY

1. Log in to Workday > Search “start disciplinary” in the Workday search bar > Click the **Start Disciplinary Action for Employee** task

2. Review the reminder about *Coaching* > Enter the name of the team member under the *Employee* field

3. Under *Review Template*, Select **By Type** > **GCNA/GIMV Coaching and Expectations Form**

4. Under *Disciplinary Action Reasons*, Click **Reasons for employee, country** > **United States of America** > **Disciplinary Action Reasons** > Select the appropriate option from the list by clicking the checkbox

5. Enter the **Period Start and Period End Dates**. **Note:** The **Period Start Date** and the **Period End Date** should be the same day the coaching is conducted.

The screenshot displays the 'Start Disciplinary Action for Employee' form in Workday. The form includes several sections and fields:

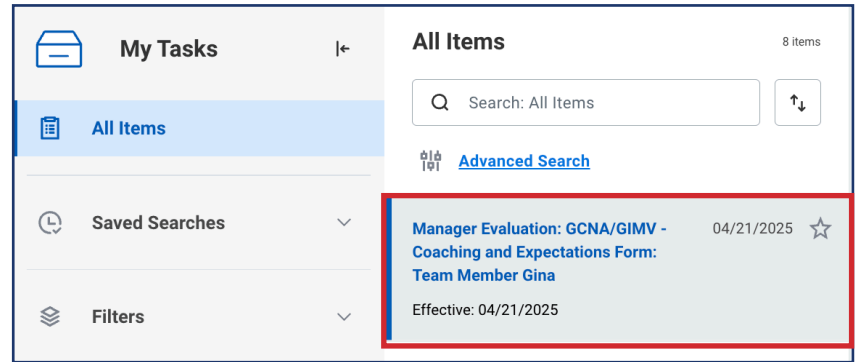
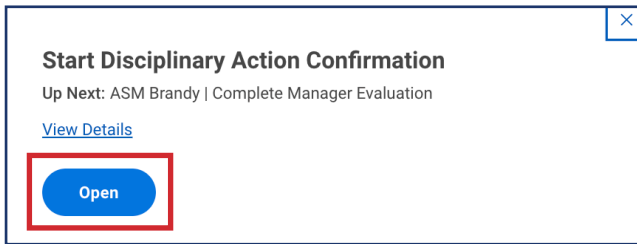
- Coaching:** A section with instructions: 'Both start date and end date should be the date the coaching is completed.' and an example: 'A coaching is completed on 7/7/2021. The Period Start Date will be 07/07/2021, and the Period End Date will be 07/7/2021.'
- Disciplinary Action:** A section with instructions: 'The "Period Start Date" should be the date the corrective action will be issued.' and 'The "Period End Date" should be 6 months after the issue date.' and an example: 'A disciplinary action is issued on 06/01/2021. The Period Start Date will be 06/01/2021, and the Period End Date will be 12/01/2021.'
- Note:** 'for "Final Warnings", the Employee must be employed for at least 90 days, so if you do not see the appropriate template, that this Employee has not been employed for at least 90 days.'
- Employee:** A dropdown menu showing 'Team Member Gina'.
- Review Template:** A dropdown menu showing 'GCNA/GIMV - Coaching and Expectations Form'.
- Disciplinary Action Reasons:** A dropdown menu showing 'Attendance (United States of America)'. A red arrow points to a modal window titled 'Disciplinary Action Reasons' which lists several options: 'Attendance (United States of America)', 'Cash Handling (United States of America)', 'Conduct - Policy Violation (United States of America)', 'Conduct - Values (United States of America)', 'NCNS (United States of America)', 'Padding (United States of America)', and 'Performance (United States of America)'. The 'Attendance' option is highlighted with a red box.
- Period Start Date:** A date field showing '04/21/2025'.
- Period End Date:** A date field showing '04/21/2025'.
- enter your comment:** A text area for comments.
- Buttons:** 'Cancel' and 'Submit' buttons at the bottom right.

Red boxes and numbers 1 through 6 are used to highlight specific steps in the process:

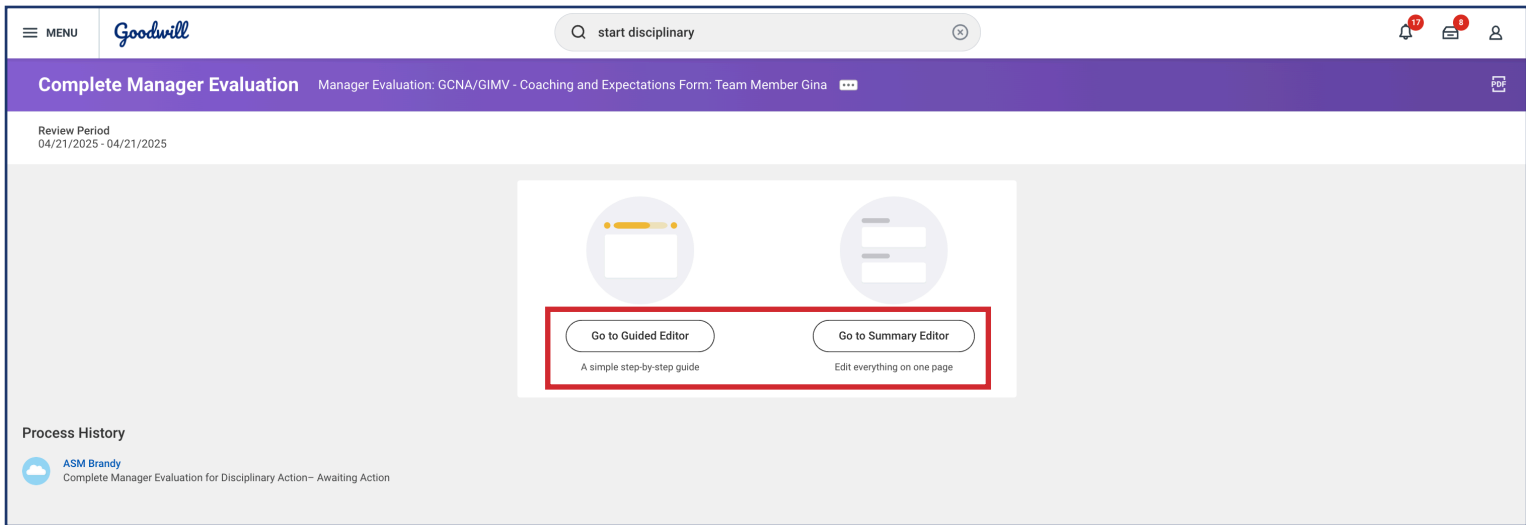
1. Search bar and 'Start Disciplinary Action for Employee' task.
2. Employee field.
3. Review Template dropdown.
4. Disciplinary Action Reasons dropdown.
5. Period Start and End Date fields.
6. Submit button.

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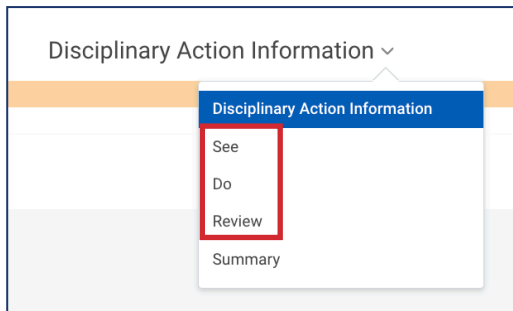
7. Click **Open** on the pop-up **OR** Click on the *Manager Evaluation Task* from the “My Tasks” Inbox



8. Select either **Guided Editor** **OR** **Summary Editor**



9. Complete the **See, Do, and Review** sections of the form > Click **Submit** when complete



IMPORTANT! Be as specific as possible in each section of the form. Include information about who, what, when, where, why, and how. Include as much detail as possible while leaving out any emotion or speculation.

10. To view documented Coachings, Disciplinary/Corrective Actions, and/or Performance Improvement Plans (PIPs), Navigate to the team member’s Workday profile > Click **Performance** > Click **Disciplinary Actions** > Click **View**

