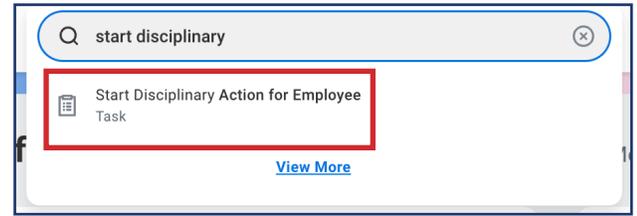


HOW TO SUBMIT A DISCIPLINARY ACTION IN WORKDAY

1. Log in to Workday > Search “start disciplinary” in the Workday search bar > Click the **Start Disciplinary Action for Employee** task
2. Review the reminders about *Disciplinary Action* > Enter the name of the team member under the *Employee* field
3. Under *Review Template*, Click **Disciplinary Actions** > Select the appropriate option from the list
4. Under *Disciplinary Action Reasons*, Click **Reasons for employee’s country** > **United States of America** > **Disciplinary Action Reasons** > Select the appropriate option from the list
5. **(OPTIONAL)** Select any *Related Disciplinary Actions* (i.e., Coachings, PIPs, previous Disciplinary Actions)
6. Enter the **Period Start Date** and **Period End Date**.
7. Click **Submit**.



IMPORTANT! The options selected under the *Review Template* field and the *Disciplinary Action Reasons* field must match unless the reason for the Disciplinary Action is performance.

Start Disciplinary Action for Employee

Coaching:
Both start date and end date should be the date the coaching is completed.
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:
The "**Period Start Date**" should be the date the corrective action will be issued.
The "**Period End Date**" should be 6 months after the issue date.
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 * 2

Review Template * 3

Disciplinary Action Reasons * 4

Related Disciplinary Actions 5

Period Start Date * 6

Period End Date * 6

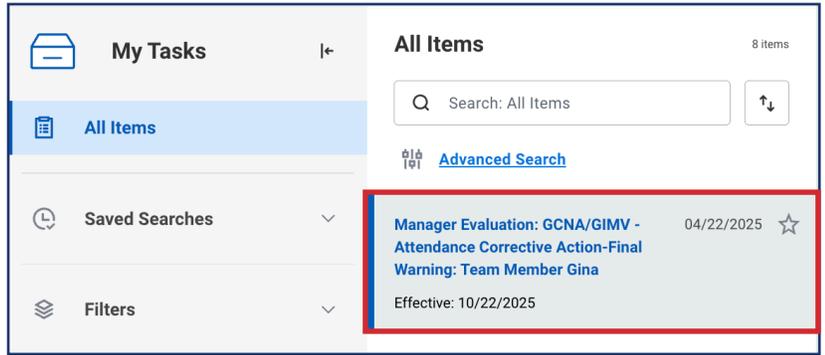
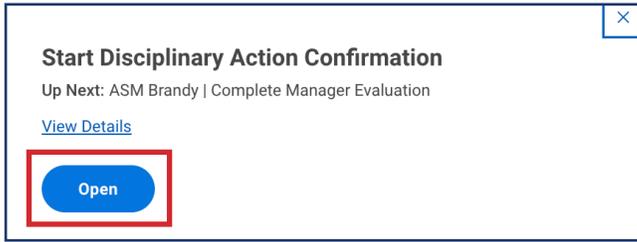
enter your comment

Note: The Period Start Date is the date that the employee is issued the Disciplinary Action. The Period End Date is the date six months after the issue date.

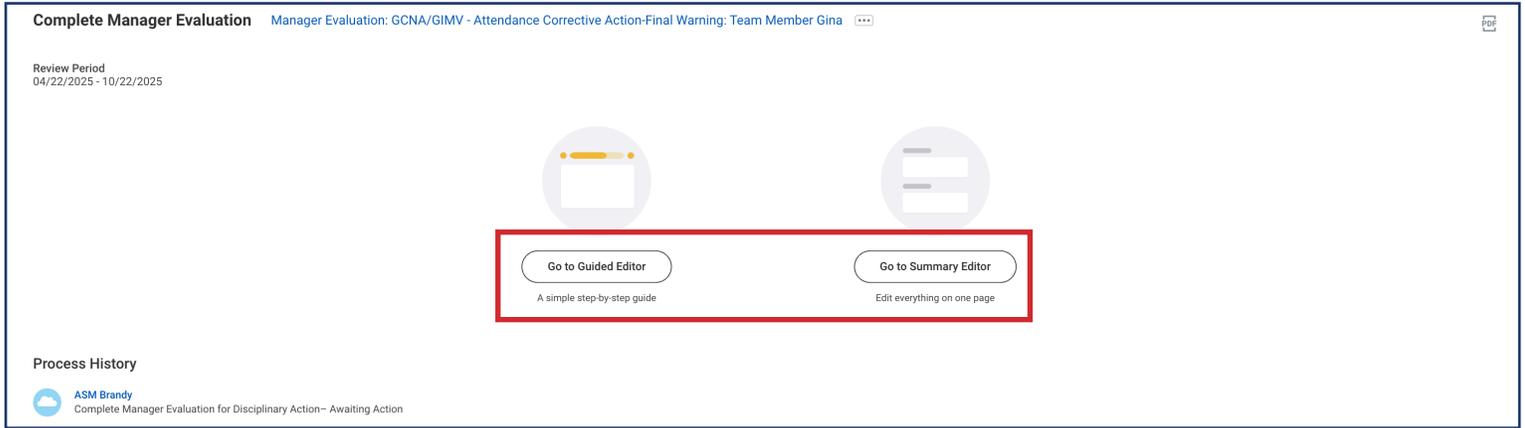
Cancel Submit 7

HOW TO SUBMIT DISCIPLINARY ACTION IN WORKDAY

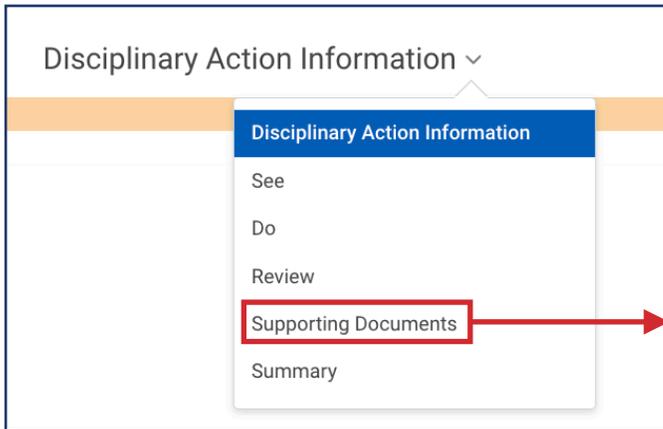
8. Click **Open** on the pop-up **OR** Click on the *Manager Evaluation* task from the “My Tasks” Inbox



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



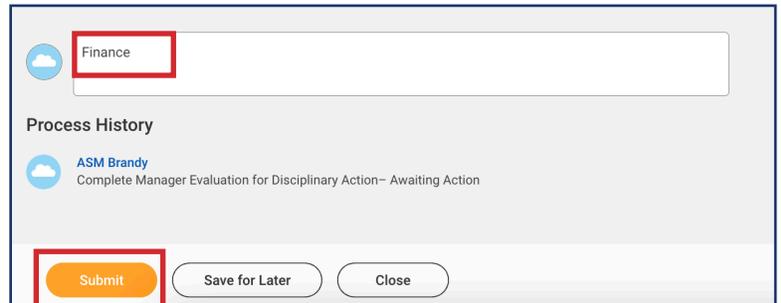
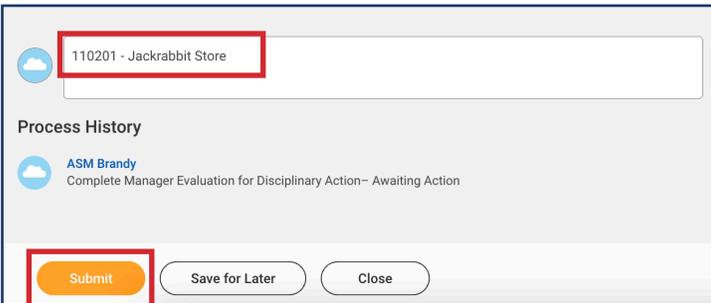
10. Complete the **See, Do, and Review** sections of the form > Upload any supporting documents



Note: 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.

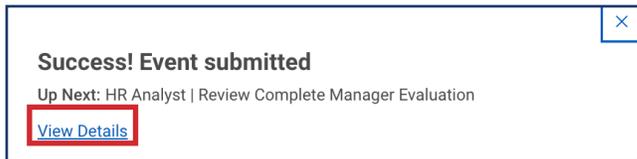
IMPORTANT! Documents that are added will be seen by the team member receiving the Disciplinary Action. Do **NOT** add any documentation that exposes third-party involvement.

11. Enter the store number **OR** the department name (i.e., IT, Finance, etc.) in the comment box of the summary section of the form > Click **Submit**



HOW TO SUBMIT DISCIPLINARY ACTION IN WORKDAY

12. Click **View Details** on the pop-up **OR** Navigate to the “My Tasks” Inbox > Click **Archive** > Select the Disciplinary Task > Click the **Process** tab > Scroll down and Click the **Remaining Process** button to view the remaining steps in the business process



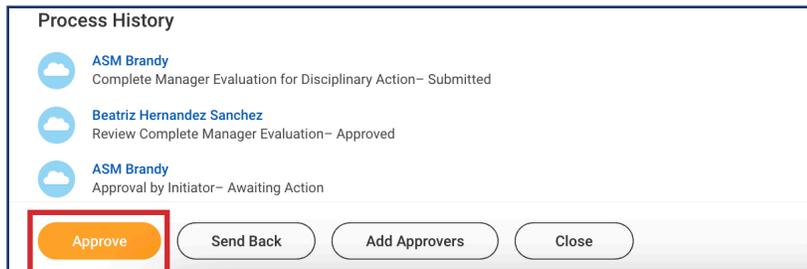
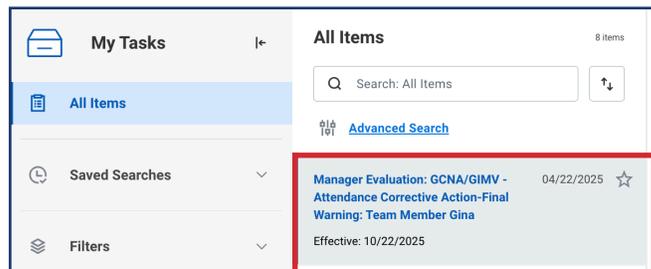
The "View Remaining Process" table shows the following steps:

Process	Step	Group	Person
Complete Manager Evaluation for Disciplinary Action	Approval by Initiator	Initiator	ASM Brandy
Complete Manager Evaluation for Disciplinary Action	To Do: Schedule Meeting with Employee	Initiator	ASM Brandy
Complete Manager Evaluation for Disciplinary Action	Provide Employee Review Comments	Employee As Self	Team Member Gina
Complete Manager Evaluation for Disciplinary Action	Provide Manager Review Comments	Initiator	ASM Brandy
Complete Manager Evaluation for Disciplinary Action	Approval by HR Analyst	HR Analyst	Beatriz Hernandez Sanchez, Donald Torres, Debra Alexander, Gray Lee-Kin, Haley Armstrong, More (10)

THE DISCIPLINARY ACTION ROUTES TO HUMAN RESOURCES FOR APPROVAL

Note: Once the Disciplinary Action is approved, the task will appear in the initiating manager’s “My Tasks” Inbox and/or under the “Awaiting Your Action” section on the manager’s Workday homepage.

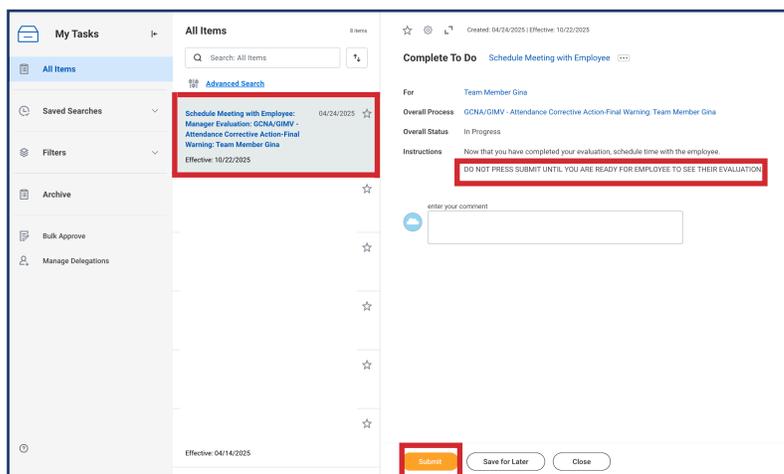
13. Click on the task > Review the Disciplinary Action > Click **Approve**



THE MANAGER MUST SCHEDULE A MEETING WITH THE TEAM MEMBER AND A WITNESS

14. The manager must schedule a meeting with the team member and an appropriate witness to formally issue and discuss the Disciplinary Action with the team member.

15. When the manager is ready for the team member to view their Disciplinary Action, the manager should navigate to their Workday “My Tasks” Inbox > Click the appropriate **Schedule Meeting with Employee** task > Click **Submit**. This action routes the Disciplinary Action to the team member’s “My Tasks” Inbox.



IMPORTANT! A witness must be present during the meeting with the manager and the team member. The witness must be in a higher position than the team member receiving the Disciplinary Action.

Note: Managers can wait to submit the task until they are in the meeting with the team member and the witness, if they do not wish for the team member to view their Disciplinary Action before the meeting.

HOW TO SUBMIT CORRECTIVE/DISCIPLINARY ACTION IN WORKDAY

16. Instruct the team member to navigate to their Workday “My Tasks” inbox to access their Disciplinary Action.

17. The team member should review their Disciplinary Action > Click to select **Acknowledge Review without Comments** **OR** Select **Acknowledge Review with Comments** and enter a comment > Click **Submit**

Note: Comments are optional. The team member has three shifts to acknowledge their Disciplinary Action.

IMPORTANT! If the team member enters a comment, do **NOT** discuss it with them. Inform the team member that HR will contact them to discuss their comments.

18. The manager must navigate to their Workday “My Tasks” inbox > Click the Disciplinary Action task > **Acknowledge Review with Comments**

19A. Enter the name and job title of the witness, in the comment section of the form > Click **Submit**

Employee Acknowledgement

Status *

Search

Acknowledge Review without Comments

Acknowledge Review with Comments

Disciplinary Action Information

Disciplinary Action Information

Disciplinary Action Reason

Attendance (United States of America)

Related Disciplinary Actions

GCNA/GIMV - Coaching and Expectations Form: Team Member Gina

See

Submit Save for Later Close

Acknowledgement

Manager Acknowledgement **Employee Acknowledgement**

Status *

Acknowledge Review with Comments

Comment

Normal

B I U A

Witness Store Manager Carlos - Store Manager

Status

Acknowledge Review without Comments

Comment

Entered by

Team Member Gina

Date

04/24/2025 11:23 AM

WHAT IF A TEAM MEMBER REFUSES TO ACKNOWLEDGE THEIR DISCIPLINARY ACTION?

Note: If the team member refuses to acknowledge the Disciplinary Action or does not acknowledge it within three consecutive working shifts, managers should reach out to their HRBP to manually advance the process.

Once the task appears in the manager’s inbox, managers should select the “**Manager Acknowledges on Behalf EE with Witness**” option when completing the manager acknowledgment portion of the Disciplinary Action process. Managers need to have their witness present while they complete the acknowledgment.

Acknowledgement

Manager Acknowledgement **Employee Acknowledgement**

Status *

Manager acknowledges on behalf of EE with witness?

Comment

Witness Store Manager Carlos - Store Manager

Status

Acknowledge Review without Comments

Comment

Entered by

Team Member Gina

Date

04/24/2025 11:23 AM