



Initiate a Performance Improvement Plan

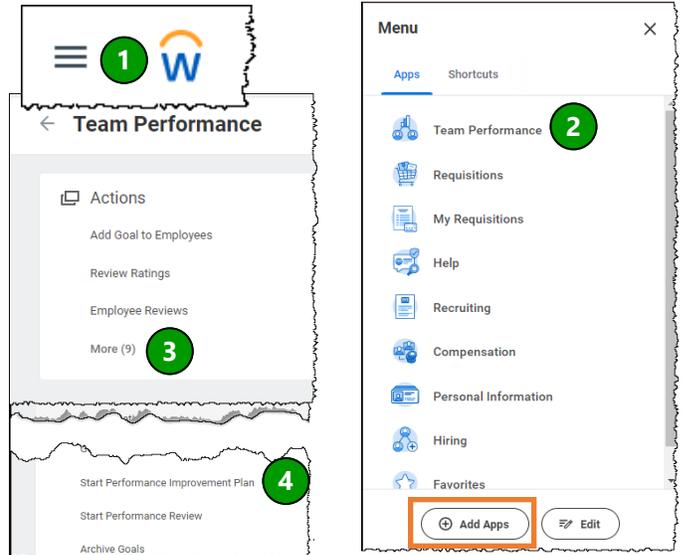
Managers initiate the Performance Improvement Plan process for employees belonging to their supervisory organization in Workday. After a Performance Improvement Plan is created, it is routed to your HR Business Partner. Follow the steps below to initiate a Performance Improvement Plan.

From the Homepage:

1. Select the **Global Navigation** button.
2. Select **Team Performance** under Apps.

Note: If you do not see **Team Performance** as an option, you can select **+ Add Apps** at the bottom of the menu.

3. Select **More (9)**.
4. Select **Start Performance Improvement Plan**.



From Start Performance Improvement Plan for Employee:

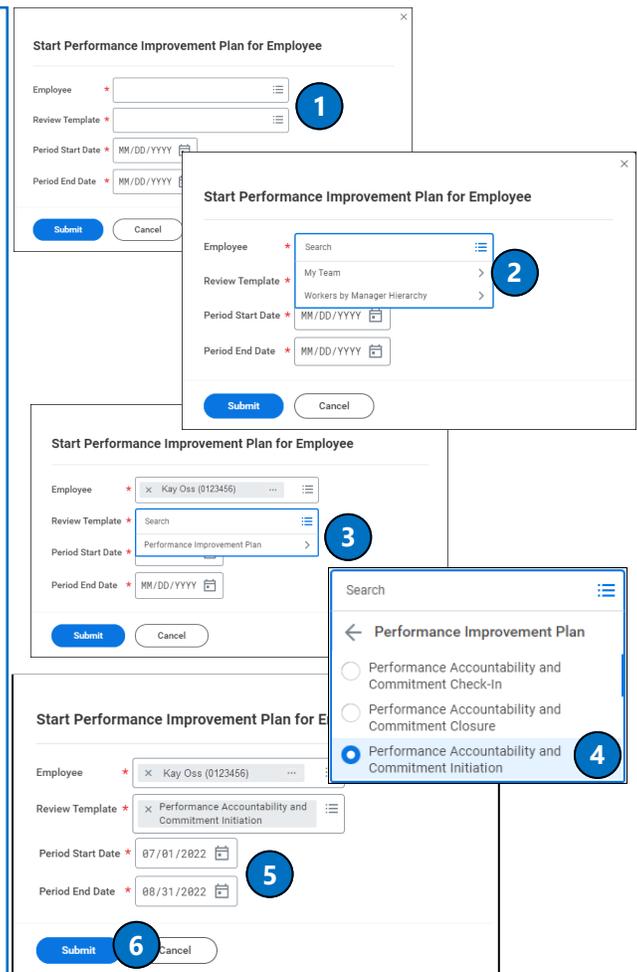
1. Select the **prompt** icon next to the **Employee** field.
2. Search for the employee by name or by searching the management hierarchies and menus.
3. Select the **prompt** icon next to **Review Template** and then select **Performance Improvement Plan**.
4. Select **Performance Accountability and Commitment Initiation** to initiate a Performance Improvement Plan.

Note: Once a Performance Improvement plan has been initiated, you can select **Performance Accountability and Commitment Check-In** to check in with an employee on their goals or **Performance Accountability and Commitment Closure** to complete the Performance Improvement process.

5. Select the **Start** and **End Dates** for the process. (Typically the length of the plan is 60-90 days.)

6. Select **Submit**.

Note: After this process has been initiated, it is then sent to the HR Business Partner.





Initiate a Performance Improvement Plan—Manager Evaluation

Once a Performance Improvement Plan has been initiated by a manager and confirmed by the HR Business Partner, the manager must complete the Manager Evaluation, which includes adding goals, responsibilities, and supporting documents. Follow the steps below to complete the Manager Evaluation portion of a Performance Improvement Plan.

From Complete Manager Evaluation:

1. A window will appear to Start Performance Improvement Plan and Complete Manager Evaluation. Select **Open**.
2. Two options will appear. The **Guided Editor** will guide you through the process. The **Summary Editor** will display the entire Manager Evaluation. Select the **preferred option**.
3. Choose whether this is a **Written PAC (Performance Accountability and Commitment)** or a **Final PAC**.
4. Complete the questions posed in the **Performance Accountability and Commitment Details**. Select the **pencil icon** to answer the questions.
5. Select **Next**.
6. Select **Add** under **Goals**.
7. Select **Next** after a Goal has been added.
8. Select **Add** under **Responsibilities**.
9. Complete any relevant employee responsibilities that are necessary for the job function.
10. Select **Next** when responsibilities have been updated.
11. Select **Add** under **Supporting Documents**.
12. If appropriate, attach any relevant files to this page, including comments.
13. Select **Next**.
14. Review the Manager Evaluation and then select **Submit**.

QUESTIONS?

Please email BusinessEducation@vumc.org.