

VUMC BUSINESS EDUCATION



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.

Menu × From the Homepage: 1 Shortcuts Apps 1. Select the **Global Navigation** button. **Team Performance** d a Team Performanc 2. Select Team Performance under Apps. 雷 Requisitions C Actions Note: If you do not see Team Performance as an My Requisition: Add Goal to Employees option, you can select + Add Apps at the bottom of the Help Review Ratings menu. Employee Revi Recruiting 3 More (9) Compensation 3. Select More (9). Personal Information 4. Select Start Performance Improvement Plan. 2 Hiring Δ 3 Favorites Start Performance Revie Add Apps *≡*∕/ Edit From Start Performance Improvement Plan for Employee: Start Performance Improvement Plan for Employee 1. Select the **prompt** icon next to the **Employee** field. Period Start Date * MM/DD/YYYY 2. Search for the employee by name or by searching the Period End Date * MM/DD/YYYY management hierarchies and menus. Start Performance Improvement Plan for Employee Cancel Search 3. Select the prompt icon next to Review Template and then 2 Му Теал Review Template select Performance Improvement Plan. MM/DD/YYYY 🖬 Period Start Date * Period End Date * MM/DD/YYYY 🛱 4. Select Performance Accountability and Commitment Initiation to initiate a Performance Improvement Plan. Cancel Start Performance Improvement Plan for Employee **Note:** Once a Performance Improvement plan has been initiated, * × Kay Oss (0123456) ... := Employee you can select Performance Accountability and Commitment 3 Check-In to check in with an employee on their goals or Performance Accountability and Commitment Closure to Period End Date * MM/DD/YYYY = Search complete the Performance Improvement process. Performance Improvement Plan Submit Cancel Performance Accountability and Commitment Check-In 5. Select the Start and End Dates for the process. (Typically the Performance Accountability and Start Performance Improvement Plan for E length of the plan is 60-90 days.) Commitment Closure Performance Accountability and Commitment Initiation 0 * × Kay Oss (0123456) Employee 6. Select Submit. × Performance Accountability and Commitment Initiation Note: After this process has been initiated, it is then sent to the Period Start Date * 07/01/2022 💼 5 HR Business Partner. Period End Date * 08/31/2022 💼

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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:

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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.

workday.

- 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**.

