



SAN MANUEL
HUMAN RESOURCES
GUIDING PROGRESS. DEVELOPING PEOPLE.

HR Essentials

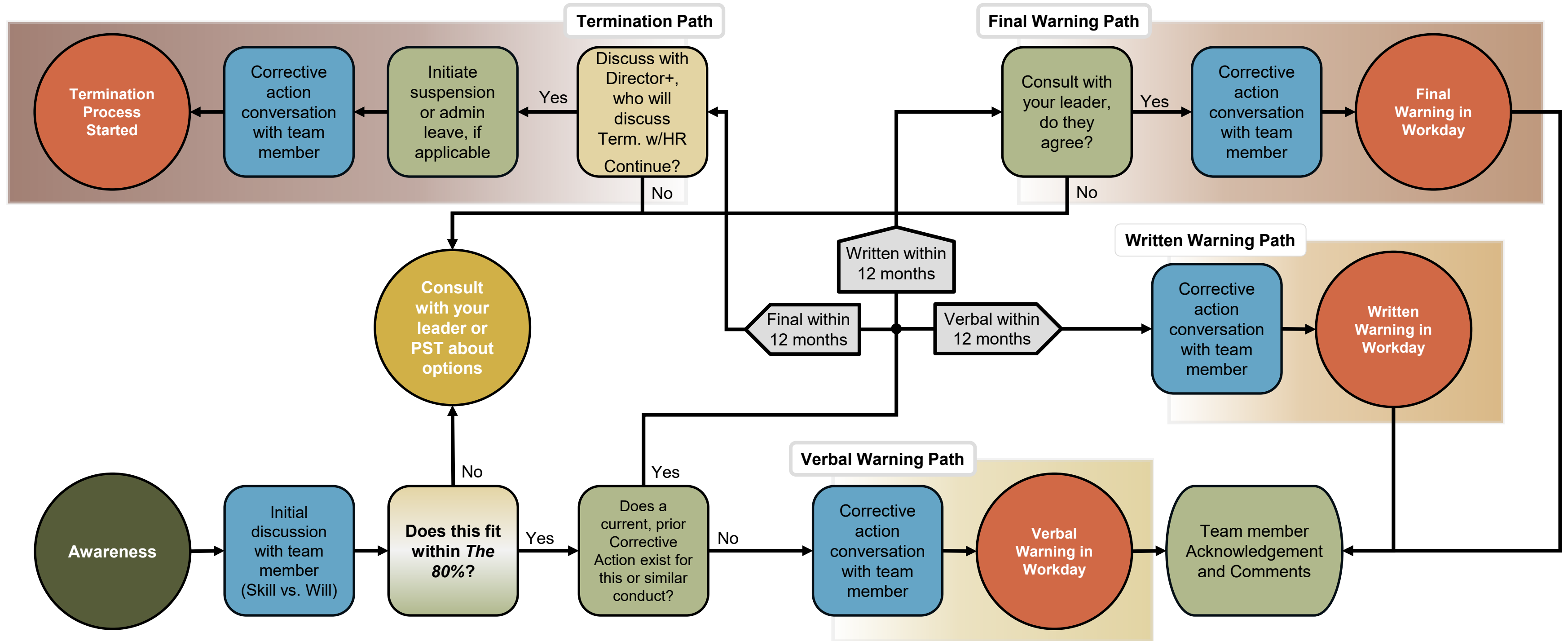
Corrective Action Process

Icebreaker Discussion

Corrective Action Process Overview



Corrective Action Process Flowchart



The Corrective Action Speedway

Decide

Draft

Deliver

Corrective Action Puzzle

Reason
Identify the category of the corrective action

Explanation
The when, what, and why for the corrective action, and priors.

Action
The specific corrective action step that is being issued

Plan
Manager expectations and the consequences of continuing the behavior.

Documentation
Documents that will support your corrective action, if applicable

Review Period
The date the corrective action was given to the team member

Decide

Draft

Deliver

Let's do an Example Together

Reason

The conduct broken is
Personal Appearance

Explanation

On 7/11/24, Joan arrived to work with wrinkled pants and jacket. A Verbal Warning for this was documented on 6/1/24.

Action

Joan's leader has decided on a **Written Warning**

Plan

Joan is to make sure her uniform is clean and without wrinkles before each shift.

Documentation

(No documentation for this situation)

Review Period

Start: 7/16/24
End: 7/16/24
(The day this is delivered to Joan)

 **5 Days!**

Decide

Draft

Deliver

Workday Disciplinary Action Form

- Disciplinary Action Reason (prompt with fixed selections)
- Review period date fields
- Explanation of Violation
- Corrective Disciplinary Action (e.g., Documented Verbal)
- Corrective Action Plan
- Supporting Documents

The screenshot shows the Workday Disciplinary Action Form interface. It is divided into several sections, each highlighted with a puzzle piece:

- Reason:** Located in the 'Disciplinary Action Information' section, it includes a dropdown for 'Disciplinary Action Reason' (e.g., 'Poor work performance (United States of America)').
- Review Period:** Located in the 'Disciplinary Action Information' section, it includes date fields for the review period.
- Explanation:** Located in the 'Explanation of Violation' section, it includes a text area for the 'Response' (e.g., 'The Team member has not met deadline for three separate projects...').
- Action:** Located in the 'Corrective Disciplinary Action' section, it includes a dropdown for the type of action (e.g., 'Documented Verbal').
- Plan:** Located in the 'Corrective Action Plan' section, it includes a text area for the 'Manager Evaluation' (e.g., 'Team member should determine key milestones and deadlines...').
- Documentation:** Located in the 'Supporting Documents' section, it includes a list of documents and an 'Add' button.

Disciplinary Action Examination #1

1. Disciplinary Action Reason: Personal Appearance
2. Explanation of Violation: Missing Name Tag (AGAIN!!!)
3. Corrective Disciplinary Action: Written Warning
4. Corrective Action Plan: On September 23, YY at 1:00pm, I observed Chris wasn't wearing his name tag in his work area. I told Chris that his name tag is part of his uniform and should always be worn per department policy. Then he gave me an excuse that he left it in his car, like last time, which is a really dumb thing to do twice in a week but here we are. Chris is advised to not be LAZY and WALK to his car and get his name tag next time or he'll get a Final Warning.
5. Supporting Documents: (None)

Mock Corrective Action Conversation

- Leaders: deliver the Disciplinary Action you prepared on page 16
- Team members: act out your Curve Ball Card
- Pair up! We'll start soon.
- Remember:
 - Stick to your points
 - Be honest and straightforward
 - Keep the conversation short but supportive
 - Answer questions

Decide

Draft

Deliver