

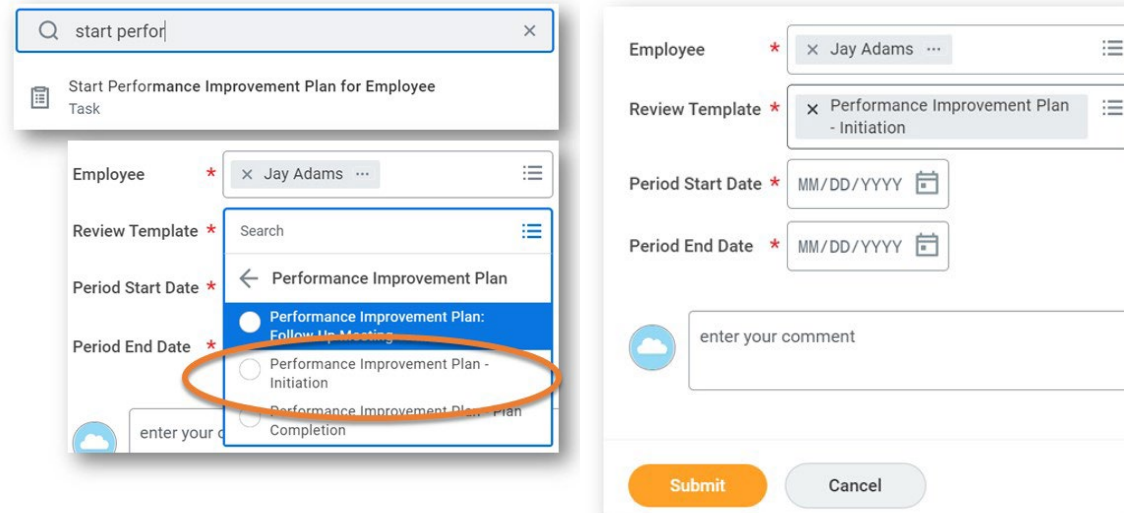
PERFORMANCE IMPROVEMENT PLAN (PIP)

There are three separate phases required to complete a PIP. All three must be initiated by the leader, so you will not receive reminders or prompts from Workday. As a leader, you must be proactive and intentional.

PHASE 1 OF 3: PLAN INITIATION (MANAGER: INITIATE PIP)

From the **Home** page:

1. In the search bar, type **Start Performance Improvement Plan**.
2. Select **Start Performance Improvement Plan for Employee**.
3. Select the **Employee**.
4. Under **Review Template**, select **Performance Improvement Plan > Performance Improvement Plan – Initiation**.
5. For **Period Start Date**, enter today's date.
6. The **Period End Date** will vary; PIPs are typically for the full year for faculty and 60-90 days for staff.
7. Click **Submit**.

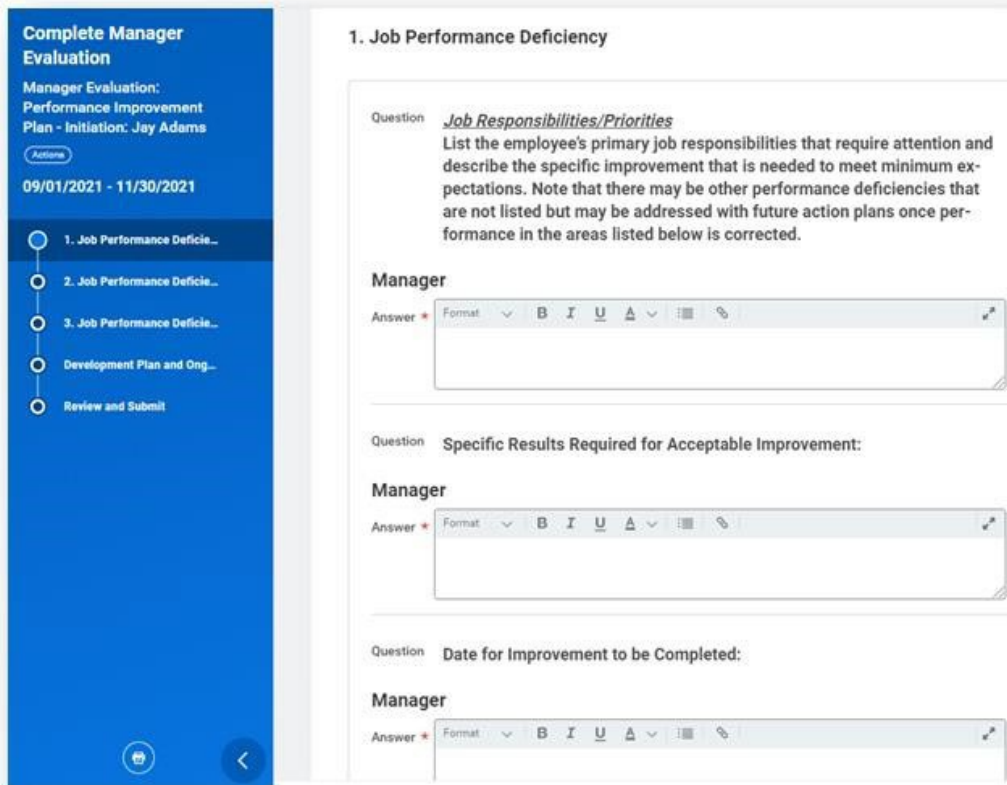


The screenshot displays the Workday interface for initiating a Performance Improvement Plan (PIP). On the left, a search bar contains the text "start perfor". Below it, a dropdown menu shows "Start Performance Improvement Plan for Employee Task". The main form fields are: Employee (Jay Adams), Review Template (Performance Improvement Plan), Period Start Date (MM/DD/YYYY), and Period End Date (MM/DD/YYYY). A dropdown menu for Review Template is open, showing "Performance Improvement Plan: Follow-Up Meeting" (selected), "Performance Improvement Plan - Initiation", and "Performance Improvement Plan - Plan Completion". The right side of the form shows the Employee and Review Template fields filled, Period Start and End Date fields, a comment box, and Submit/Cancel buttons.

MANAGER: CREATE PLAN

From the **Home** page:

1. Launch the PIP from the dialog box or your **Inbox**.
2. Identify the **Job Performance Deficiency** and **Specific Results Required for Acceptable Improvement**.
3. Enter a **Date for Improvement**. This may be “Immediate and Ongoing” or a specific date, depending on the nature of the issues outlined.
4. Click **Next**.



The screenshot displays the 'Complete Manager Evaluation' interface. On the left, a blue sidebar contains a progress indicator with five steps: '1. Job Performance Deficie...', '2. Job Performance Deficie...', '3. Job Performance Deficie...', 'Development Plan and Ong...', and 'Review and Submit'. The main content area is titled '1. Job Performance Deficiency' and contains three questions, each with a 'Manager' label and a rich text editor for the answer.

1. Job Performance Deficiency

Question *Job Responsibilities/Priorities*
List the employee's primary job responsibilities that require attention and describe the specific improvement that is needed to meet minimum expectations. Note that there may be other performance deficiencies that are not listed but may be addressed with future action plans once performance in the areas listed below is corrected.

Manager
Answer *

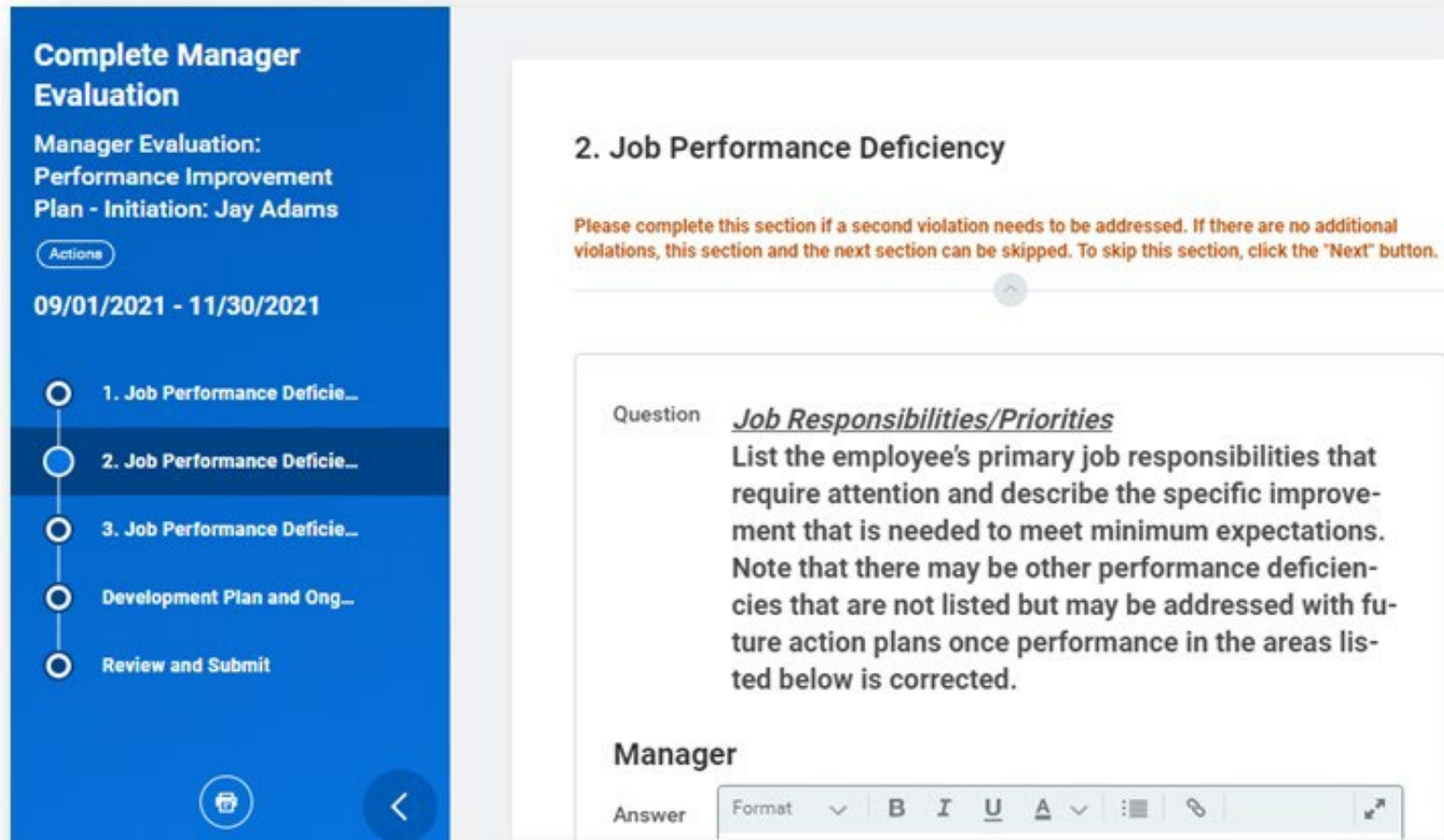
Question Specific Results Required for Acceptable Improvement:

Manager
Answer *

Question Date for Improvement to be Completed:

Manager
Answer *

5. Identify additional deficiencies, if applicable (up to three may be included in one PIP).
6. Skip if there are no additional deficiencies.
7. Click **Next**.



Complete Manager Evaluation

Manager Evaluation:
Performance Improvement Plan - Initiation: Jay Adams

Actions

09/01/2021 - 11/30/2021

- 1. Job Performance Deficie...
- 2. Job Performance Deficie...**
- 3. Job Performance Deficie...
- Development Plan and Ong...
- Review and Submit

2. Job Performance Deficiency

Please complete this section if a second violation needs to be addressed. If there are no additional violations, this section and the next section can be skipped. To skip this section, click the "Next" button.

Question **Job Responsibilities/Priorities**

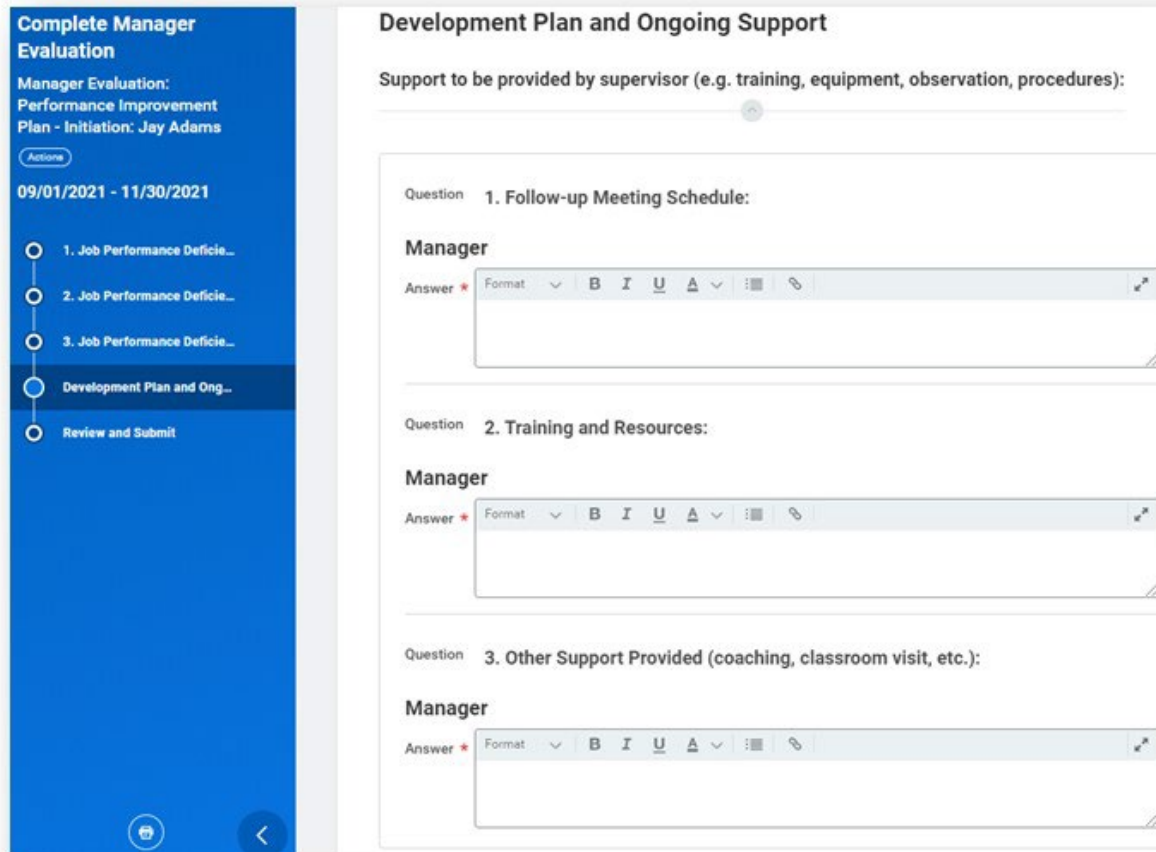
List the employee's primary job responsibilities that require attention and describe the specific improvement that is needed to meet minimum expectations. Note that there may be other performance deficiencies that are not listed but may be addressed with future action plans once performance in the areas listed below is corrected.

Manager

Answer

Format **B** *I* U **A**

8. Provide a **Follow-Up Meeting Schedule**.
9. Identify **Training and Resources**.
10. Indicate **Other Support**.
11. Click **Next**.
12. Review the PIP and click **Submit**.



Complete Manager Evaluation
Manager Evaluation:
Performance Improvement Plan - Initiation: Jay Adams
Actions
09/01/2021 - 11/30/2021

- 1. Job Performance Deficie...
- 2. Job Performance Deficie...
- 3. Job Performance Deficie...
- Development Plan and Ong...**
- Review and Submit

Development Plan and Ongoing Support

Support to be provided by supervisor (e.g. training, equipment, observation, procedures):

Question 1. Follow-up Meeting Schedule:

Manager

Answer *

Question 2. Training and Resources:

Manager

Answer *

Question 3. Other Support Provided (coaching, classroom visit, etc.):

Manager

Answer *

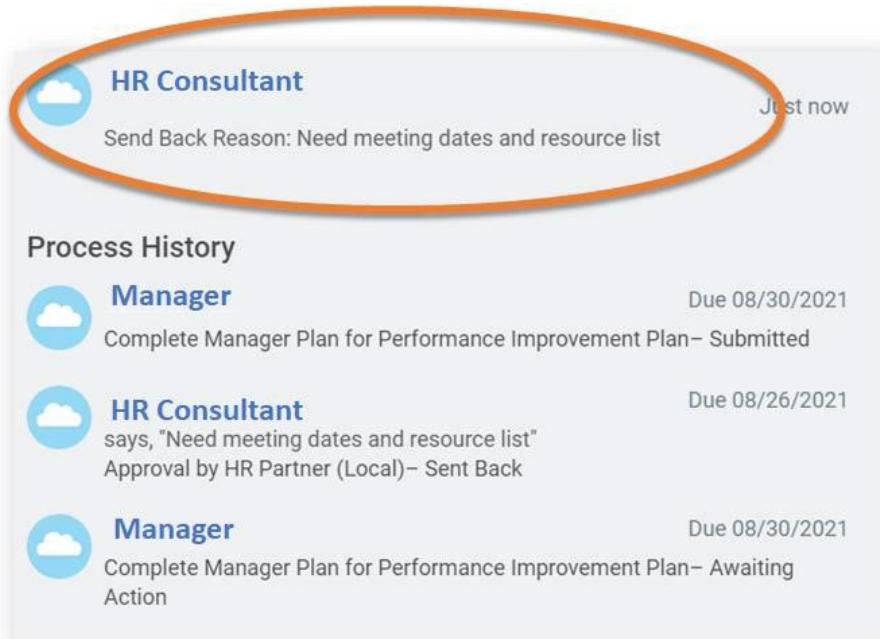
Submit

Save for Later

MANAGER: COMPLETE ANY CHANGES AND RESUBMIT

HR will review and approve the PIP.

1. If HR has concerns about the PIP, the HR consultant will send it back for revisions.
2. To see comments from HR, launch the PIP from your **Inbox** and navigate to the end of the document.
3. Navigate to the appropriate sections to make revisions and **Submit**.



The screenshot displays a 'Process History' section for a PIP. At the top, a notification from an 'HR Consultant' is circled in orange, stating 'Send Back Reason: Need meeting dates and resource list' with a timestamp of 'Just now'. Below this, the process history shows three steps: 1. 'Manager' (Due 08/30/2021) - 'Complete Manager Plan for Performance Improvement Plan- Submitted'. 2. 'HR Consultant' (Due 08/26/2021) - 'says, "Need meeting dates and resource list" Approval by HR Partner (Local)- Sent Back'. 3. 'Manager' (Due 08/30/2021) - 'Complete Manager Plan for Performance Improvement Plan- Awaiting Action'.

MANAGER'S MANAGER: APPROVE PIP

Once approved by HR, the PIP will go to the manager's manager for review and approval.

From the **Home** page:

1. Open the PIP in your **Inbox**. Select **Get Started**.
2. Review PIP.
3. Click **Approve** to advance the PIP or **Send Back** to route the PIP back to the manager for changes.

NEXT-LEVEL LEADER: APPROVE PIP

Once approved, the PIP will go to the next-level leader for review and approval.

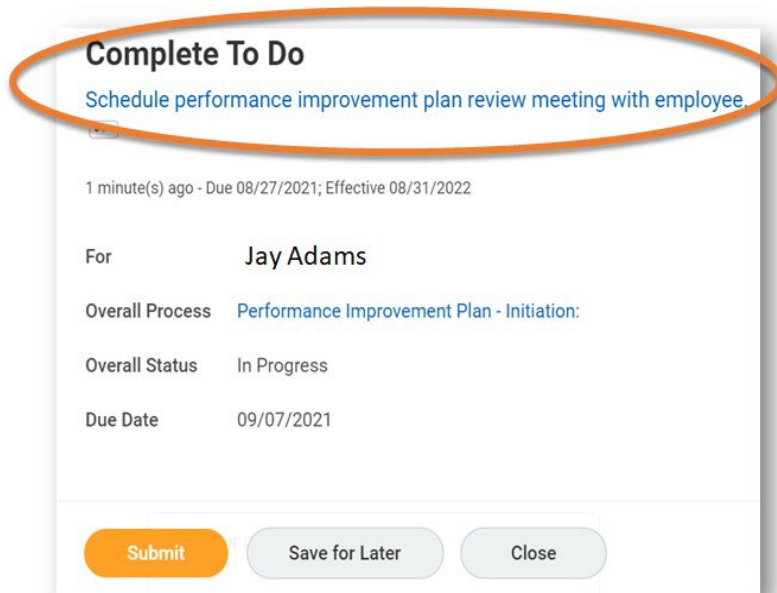
From the **Home** page:

1. Open the PIP in your **Inbox**.
2. Click **Approve** to advance the PIP or **Send Back** to route the PIP back to the manager for changes.
3. The leader should ensure that the campus provost or appropriate executive leadership team member is made aware of the PIP.

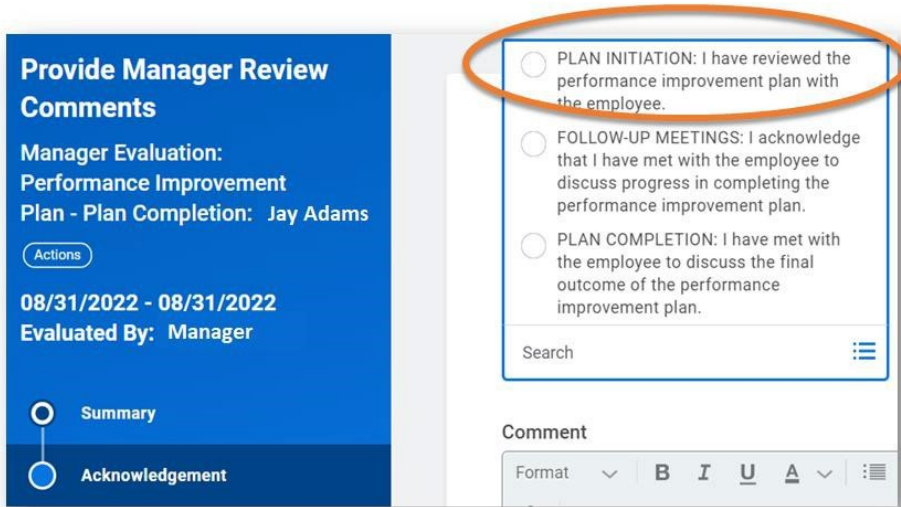
MANAGER: SCHEDULE MEETING AND DELIVER PIP

From the **Home** page:

1. Launch the **To-Do** from your **Inbox**.
2. Confirm that you have scheduled a meeting to go over the PIP.
3. Click **Submit**.



4. Launch the PIP from your **Inbox**.
5. Select the **Plan Initiation Acknowledgement Status** to confirm that you have reviewed the PIP with the team member.
6. Add comments, if needed.
7. Click **Submit**.



Provide Manager Review Comments

Manager Evaluation:
Performance Improvement Plan - Plan Completion: Jay Adams

Actions

08/31/2022 - 08/31/2022
Evaluated By: Manager

Summary

Acknowledgement

PLAN INITIATION: I have reviewed the performance improvement plan with the employee.

FOLLOW-UP MEETINGS: I acknowledge that I have met with the employee to discuss progress in completing the performance improvement plan.

PLAN COMPLETION: I have met with the employee to discuss the final outcome of the performance improvement plan.

Search

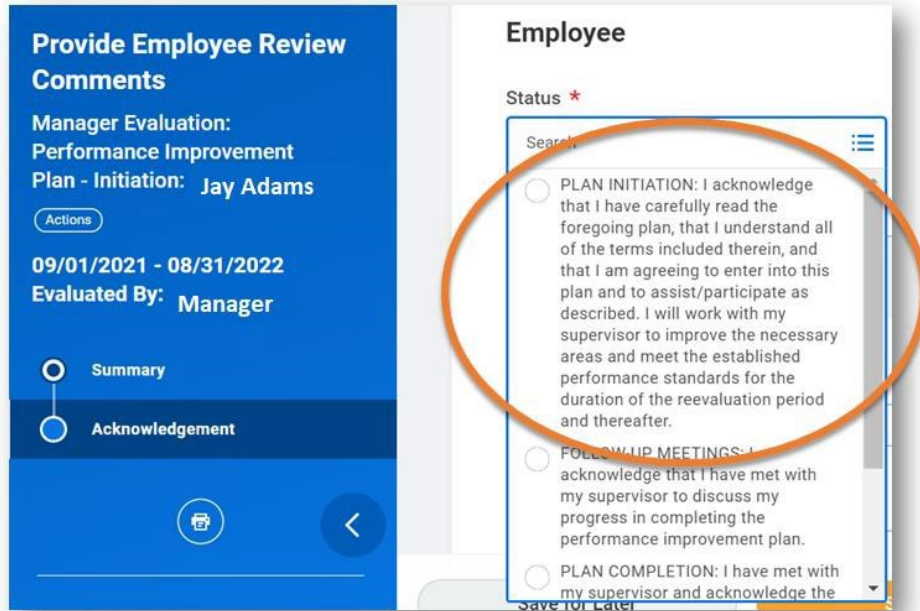
Comment

Format **B** **I** **U** **A**

TEAM MEMBER: COMMENT AND ACKNOWLEDGE PIP

From the **Home** page:

1. Launch the PIP from your **Inbox**.
2. Select the **Plan Initiation Acknowledgement Status** to confirm that you have reviewed the PIP with your manager.
3. Add comments, if needed.
4. Click **Submit**.

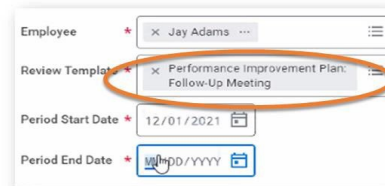
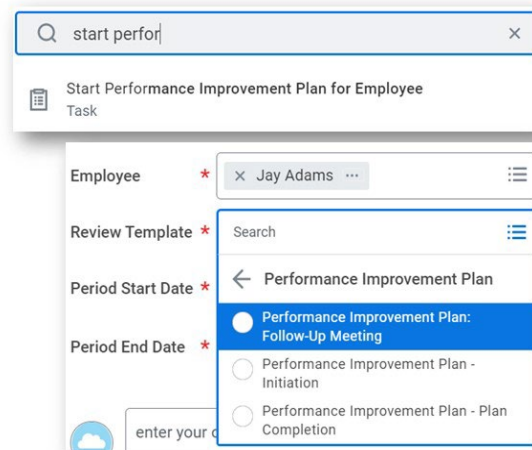


PHASE 2 OF 3: FOLLOW-UP MEETINGS (MANAGER: INITIATE FOLLOW-UP MEETING)

Each follow-up meeting must be documented in Workday. The number of follow-up meetings will depend on the length of the PIP and deficiencies to be addressed.

From the **Home** page:

1. In the search bar, type **Start Performance Improvement Plan**.
2. Select **Start Performance Improvement Plan for Employee**.
3. Select the **Employee**.
4. Under **Review Template**, select **Performance Improvement Plan > Performance Improvement Plan – Follow-Up Meeting Review Template**.
5. Enter today's date in **Period Start Date**.
6. Enter today's date in **Period End Date**.
7. Click **Submit**.

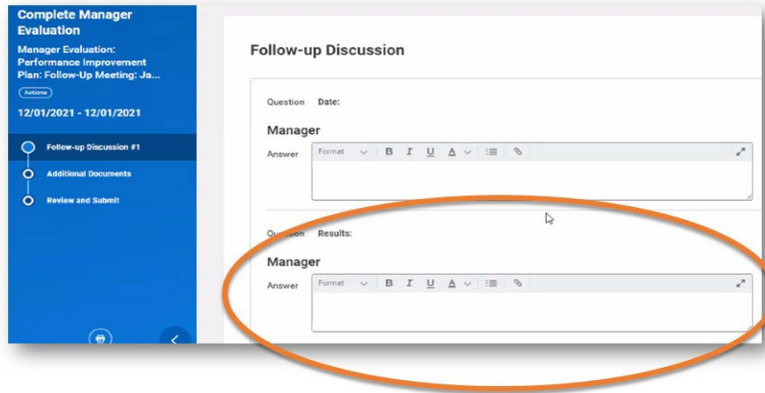


MANAGER: DOCUMENT COMPLETED FOLLOW-UP MEETING

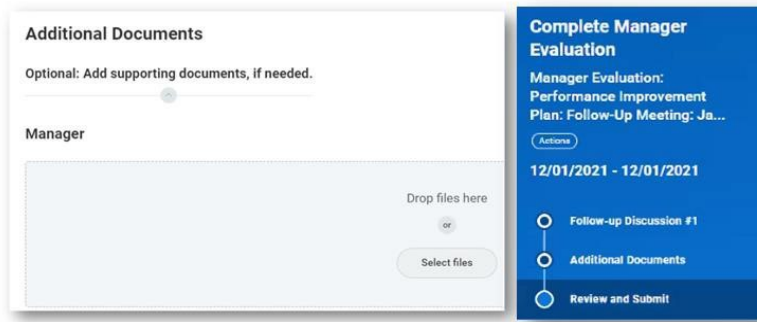
After conducting the meeting, you will need to document the results in Workday.

From the **Home** page:

1. Launch the PIP from the dialog box or your **Inbox**.
2. Confirm the **Date** of the follow-up discussion.
3. Summarize the details of the discussion in the **Results** text box.
4. Click **Next**.



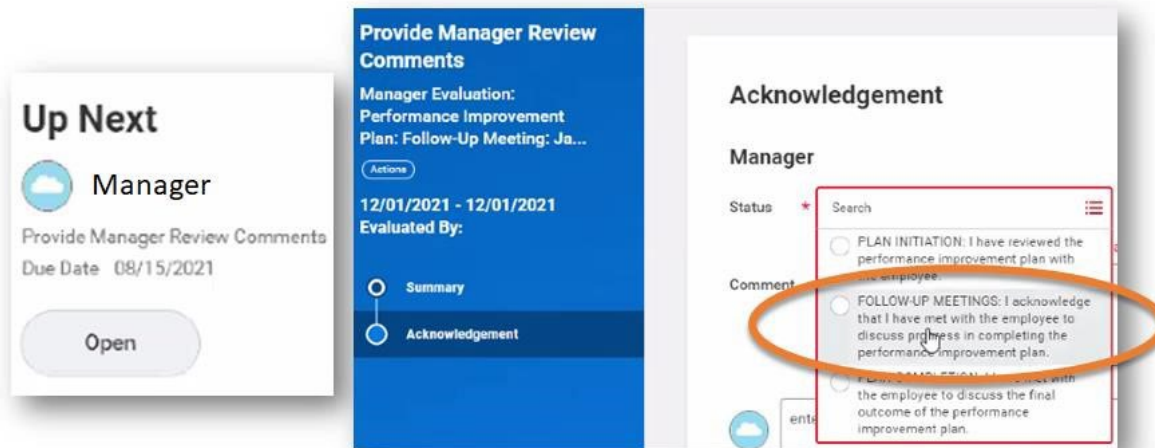
5. If needed, add attachments.
6. Click **Next**.
7. Review the PIP and click **Submit**.



MANAGER: ACKNOWLEDGE COMPLETED FOLLOW-UP MEETING

From the **Home** page:

1. From your **Inbox**, launch the PIP.
2. Under **Status**, select the **Follow-Up Meeting** option.
3. Click **Submit**.



MANAGER: COMPLETE ANY CHANGES AND RESUBMIT

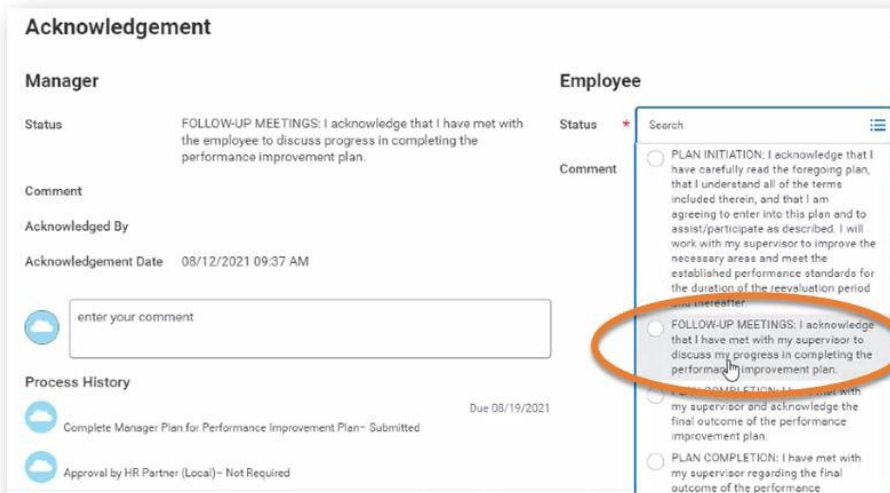
HR will review and approve the follow-up meeting notes.

1. If HR has concerns about the PIP follow-up meeting notes, the HR consultant will send the PIP back for revisions.
2. To see comments from HR, launch the PIP from your **Inbox** and navigate to the end of the document.
3. Make revisions and **Submit**.

EMPLOYEE: COMMENT AND ACKNOWLEDGE FOLLOW-UP MEETING OCCURRED

From the **Home** page:

1. Launch the PIP from your **Inbox**.
2. Review the manager's meeting notes.
3. Confirm that a meeting has taken place and select the **Follow-Up Meeting Status** before clicking **Submit**.



Acknowledgement

Manager

Status FOLLOW-UP MEETINGS: I acknowledge that I have met with the employee to discuss progress in completing the performance improvement plan.

Comment

Acknowledged By

Acknowledgement Date 08/12/2021 09:37 AM

enter your comment

Process History

Complete Manager Plan for Performance Improvement Plan - Submitted Due 08/19/2021

Approval by HR Partner (Local) - Not Required

Employee

Status * Search

Comment

PLAN INITIATION: I acknowledge that I have carefully read the foregoing plan, that I understand all of the terms included therein, and that I am agreeing to enter into this plan and to assist/participate as described. I will work with my supervisor to improve the necessary areas and meet the established performance standards for the duration of the reevaluation period thereafter.

FOLLOW-UP MEETINGS: I acknowledge that I have met with my supervisor to discuss my progress in completing the performance improvement plan.

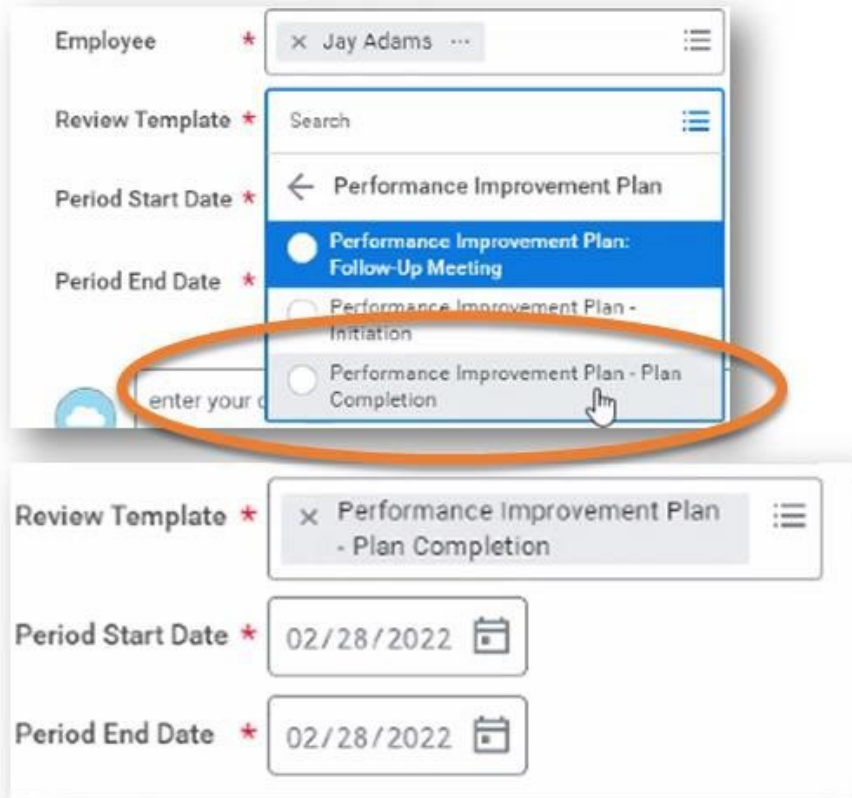
PLAN COMPLETION: I have met with my supervisor and acknowledge the final outcome of the performance improvement plan.

PLAN COMPLETION: I have met with my supervisor regarding the final outcome of the performance

PHASE 3 OF 3: PLAN COMPLETION (MANAGER: INITIATE COMPLETION STAGE OF PIP)

From the **Home** page:

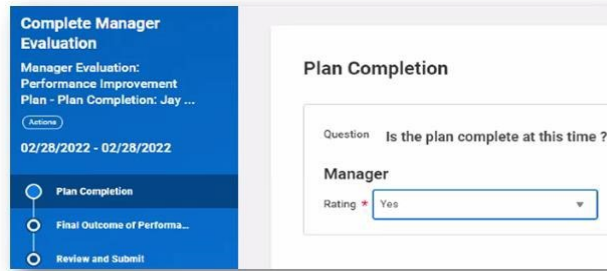
1. In the search bar, type **Start Performance Improvement Plan**.
2. Select **Start Performance Improvement Plan for Employee**.
3. Select the **Employee**.
4. Under **Review Template**, select **Performance Improvement Plan > Performance Improvement Plan – Completion Review Template**.
5. The **Period Start Date** is today's date.
6. The **Period End Date** is today's date.
7. Click **Submit**.



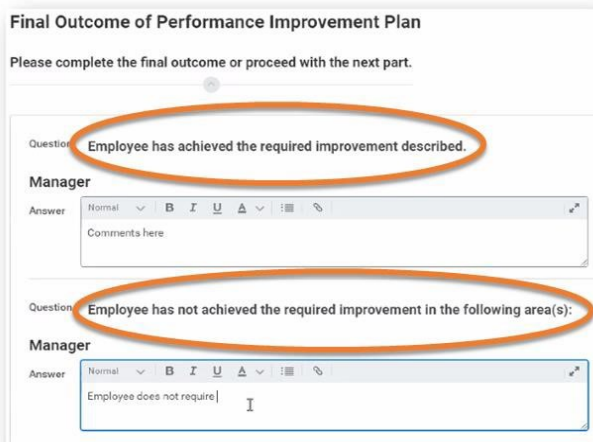
MANAGER: CONFIRM PIP COMPLETION AND RECORD OUTCOMES

From the **Home** page:

1. Launch the PIP from the dialog box or your **Inbox**.
2. Select **Yes** from the drop-down menu to confirm the plan has been completed.
3. Click **Next**.



4. Respond whether the team member made necessary improvements.
5. Respond if there are still areas of improvement.
6. Click **Next**.
7. Review and **Submit**.



MANAGER: COMPLETE ANY CHANGES AND RESUBMIT

HR will review and approve the PIP results.

1. If HR has concerns about the PIP results, the HR consultant will send it back for revisions.
2. To see comments from HR, launch the PIP from your **Inbox** and navigate to the end of the document.
3. Make revisions and **Submit**.

MANAGER'S MANAGER: APPROVE PIP CONCLUSION AND OUTCOME

Once approved by HR, the PIP will go to the manager's manager for review and approval.

From the **Home** page:

1. Open the PIP in your **Inbox**. Select **Get Started**.
2. Review PIP.
3. Click **Approve** to advance the PIP or **Send Back** to route the PIP back to the manager for changes.

NEXT-LEVEL LEADER: APPROVE PIP CONCLUSION AND OUTCOME

Once approved, the PIP will go to the next-level leader for review and approval.

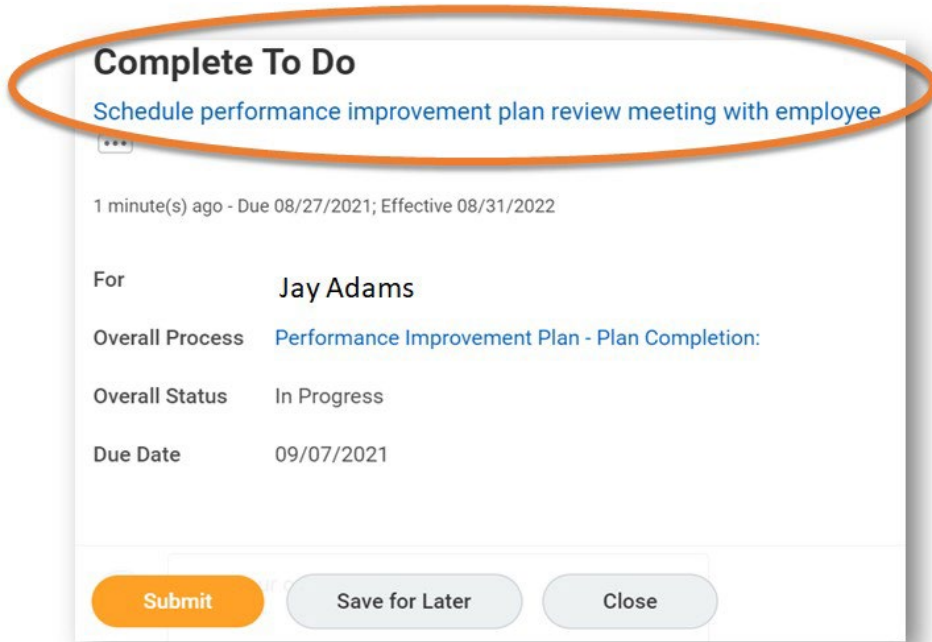
From the **Home** page:

1. Open the PIP in your **Inbox**.
2. Click **Approve** to advance the PIP or **Send Back** to route the PIP back to the manager for changes.
3. The leader should ensure that the campus provost or appropriate executive leadership team member is made aware of the PIP outcome.

MANAGER: SCHEDULE MEETING WITH TEAM MEMBER

From the **Home** page:

1. Launch the **To-Do** from your **Inbox**.
2. Confirm that you have scheduled a meeting to finish the PIP.
3. Click **Submit**.



Complete To Do
Schedule performance improvement plan review meeting with employee

1 minute(s) ago - Due 08/27/2021; Effective 08/31/2022

For **Jay Adams**

Overall Process **Performance Improvement Plan - Plan Completion:**

Overall Status **In Progress**

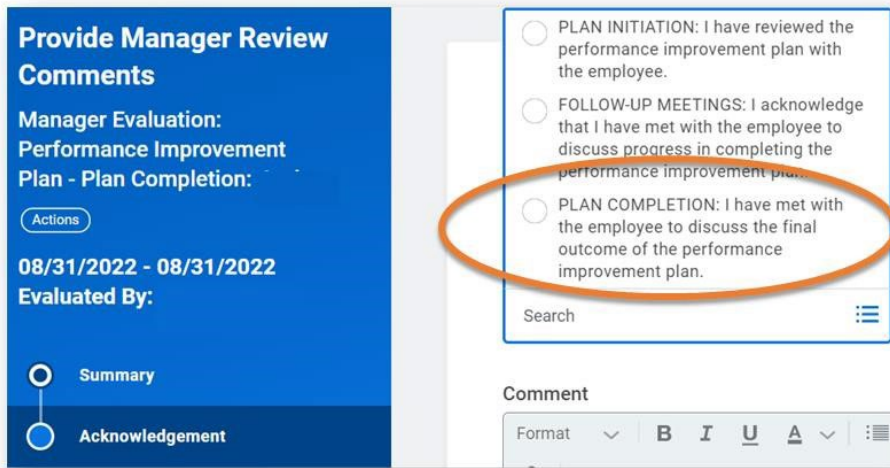
Due Date **09/07/2021**

Submit Save for Later Close

MANAGER: CONFIRM MEETING OCCURRED

From the **Home** page:

1. Launch the PIP from your Inbox.
2. Select the **Plan Completion Acknowledgement Status** to confirm that you have reviewed the PIP outcome with the employee.
3. Add comments, if needed.
4. Click **Submit**.



Provide Manager Review Comments

Manager Evaluation:
Performance Improvement Plan - Plan Completion:

Actions

08/31/2022 - 08/31/2022
Evaluated By:

Summary

Acknowledgement

- PLAN INITIATION: I have reviewed the performance improvement plan with the employee.
- FOLLOW-UP MEETINGS: I acknowledge that I have met with the employee to discuss progress in completing the performance improvement plan.
- PLAN COMPLETION: I have met with the employee to discuss the final outcome of the performance improvement plan.

Search

Comment

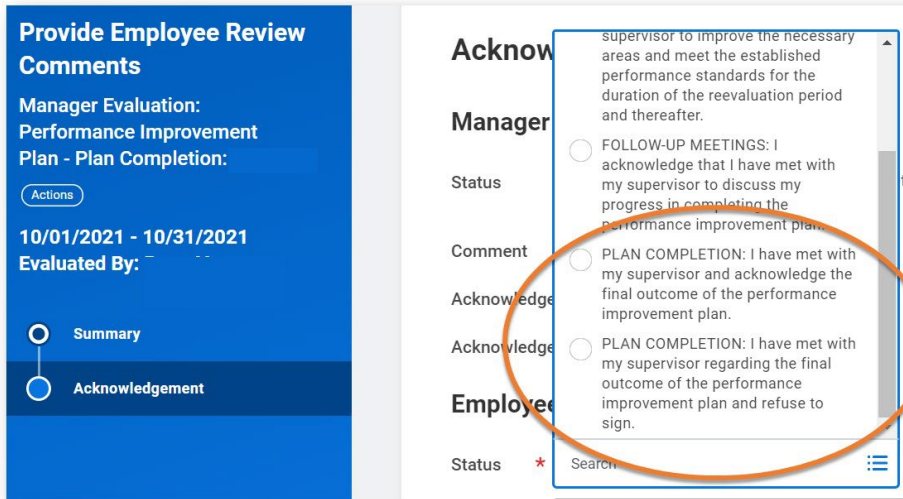
Format **B** *I* U **A**

TEAM MEMBER: CONFIRM MEETING OCCURRED

From the **Home** page:

1. Launch the PIP from your **Inbox**.
2. Select the appropriate **Plan Completion Acknowledgement Status** to confirm that you have reviewed the PIP outcome with your manager.
3. Add comments, if needed.

4. Click **Submit**.



Provide Employee Review Comments

Manager Evaluation:
Performance Improvement Plan - Plan Completion:

Actions

10/01/2021 - 10/31/2021
Evaluated By: _____

Summary

Acknowledgement

Acknowledgement

Manager

Status

Comment

Acknowledgement

Acknowledgement

Employee

Status * Search

supervisor to improve the necessary areas and meet the established performance standards for the duration of the reevaluation period and thereafter.

FOLLOW-UP MEETINGS: I acknowledge that I have met with my supervisor to discuss my progress in completing the performance improvement plan.

PLAN COMPLETION: I have met with my supervisor and acknowledge the final outcome of the performance improvement plan.

PLAN COMPLETION: I have met with my supervisor regarding the final outcome of the performance improvement plan and refuse to sign.

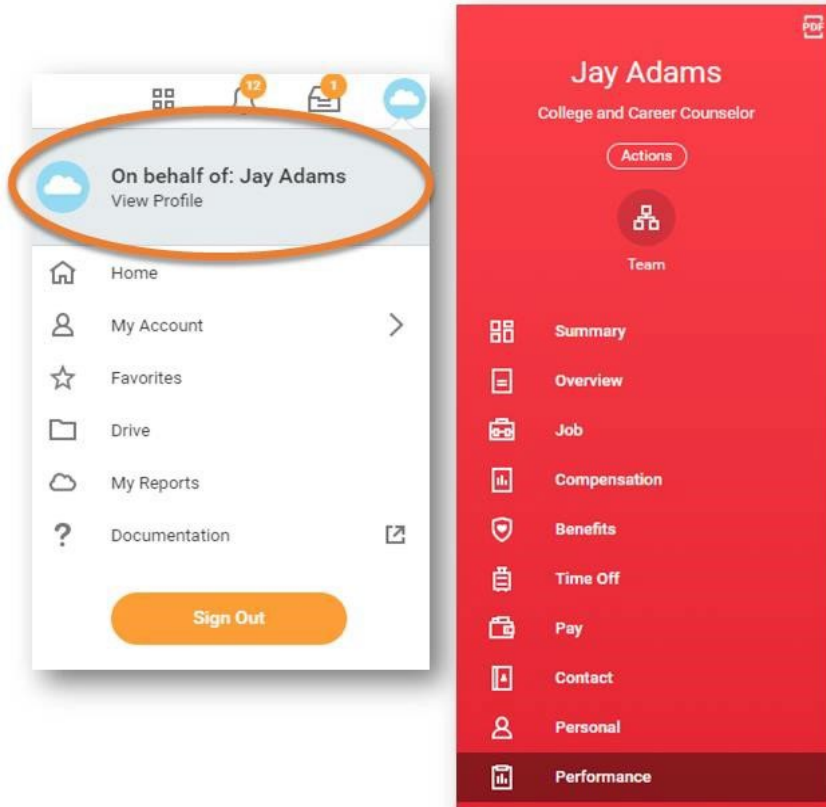
VIEW COMPLETED PIP

EMPLOYEE VIEW

From the **Home** page:

1. Click the cloud and select **View Profile**.
2. Select **Performance** (you may need to click **More**).

3. Click the **Performance Improvement Plans** tab.
4. Click **View** to view or **Create New PDF** to generate a PDF for downloading and printing. *Note: Each component of the PIP will be a separate PDF and will need to be downloaded individually for inclusion in MYC packets.*





Individual Goals Performance Reviews **Disciplinary Actions** **Performance Improvement Plans** Training and Developments

Turn on the new tables view

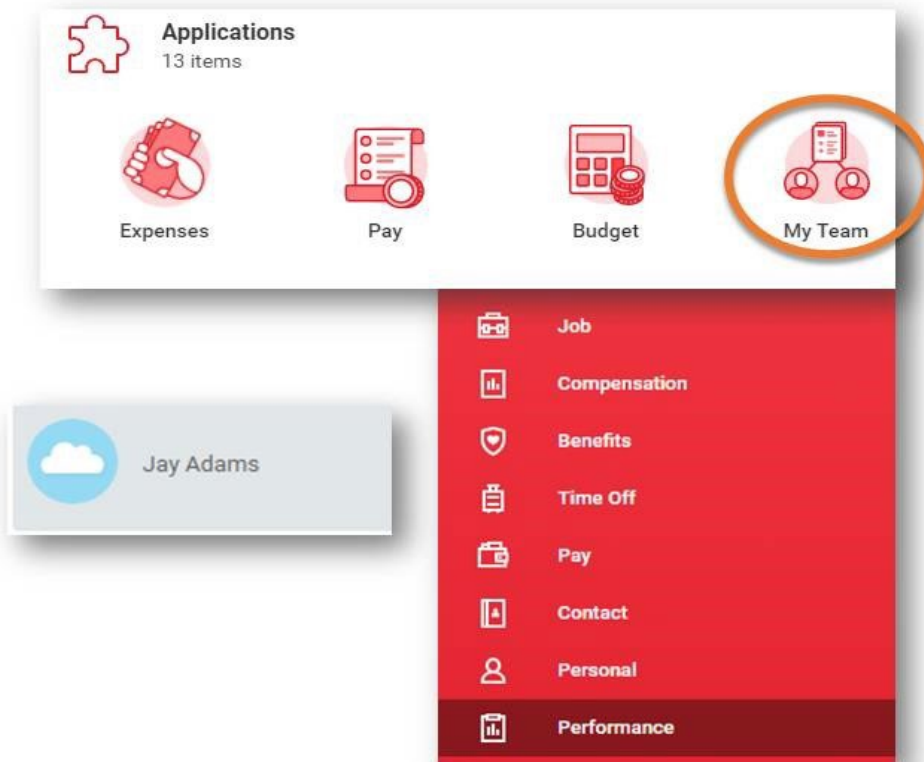
In Progress 1 item

Review	Review Period		Status	Awaiting	Due Date	View	Create New PDF
	Start Date	End Date					
	10/15/2021	10/14/2022	Provide Employee Review Comments	Jay Adams	08/17/2021		

MANAGER VIEW




From the **Home** page:

1. Click **My Team**.
2. Select the **employee's name**.
3. Click **Performance**.
4. Click the **Performance Improvement Plans** tab.
5. Click **View** to view or **Create New PDF** to generate a PDF for downloading and printing. *Note: Each component of the PIP will be a separate PDF and will need to be downloaded individually for inclusion in MYC packets.*



Individual Goals Performance Reviews **Disciplinary Actions** **Performance Improvement Plans** Training and Developments

Turn on the new tables view

In Progress 1 item   

Review	Review Period		Status	Awaiting	Due Date	View	Create New PDF
	Start Date	End Date					
	10/15/2021	10/14/2022	Provide Employee Review Comments	Jay Adams	08/17/2021		