

Manager- Start Disciplinary Action

USER GUIDE

INTRODUCTION

Use this job aid as a resource to complete Disciplinary Action for an employee.

1. Enter in the search field **Start Disciplinary Action for Employee**.

Start Disciplinary Action for Employee
Task

2. A new screen will open to start the action. Any fields with a red asterisk * are required.

Start Disciplinary Action for Employee

Start and end dates can be edited if needed. To begin, select today's date for both fields.

Employee *	<input type="text"/>
Review Template *	<input type="text"/>
Disciplinary Action Reasons *	<input type="text"/>
Related Disciplinary Actions	<input type="text"/>
Period Start Date *	<input type="text" value="MM/DD/YYYY"/>
Period End Date *	<input type="text" value="MM/DD/YYYY"/>

3. Under Review Template, select **County & IT**, then **Disciplinary Action Form**.

← County & IT

Disciplinary Action Form

4. Under Disciplinary Action Reasons, select **Reasons for employee's county, United States of America**, then **County Disciplinary Action**.

5. **Select the box** for the type of action and hit **Enter**.



← County Disciplinary Action

1 Informal Written (United States of America)

2 Formal Written (United States of America)

3 Final Written (United States of America)

6. Enter the **Period Start Date** and **End Date** and hit **Submit**.

7. As the Manager, you will now get the task to **Complete Manager Evaluation**. Using the Pencil Icon  go into each area to complete the disciplinary action. Any fields with a red asterisk * are required. Click the Checkmark Icon  to save the information as you go.

8. You can **upload** any supporting documents that need to be saved with the Disciplinary Action.

9. **HR Review**- if you select **YES**: this will go to the HR Director for further review. If you **NO**: you will need to complete the review with the employee.

10. Once completed, hit **Submit**.

11. HR Review- YES: The HR Director will review and Approve, Send Back or Deny. Either options will go back to the Manager for further steps.

12. HR Review-NO: You will be given a task to complete the Disciplinary Action with the Employee. Once done click **Submit**.

13. This will then give the employee a task to review and acknowledge with agree or disagree. They will need to enter in any fields with a red asterisk * and click **Submit**.

14. The Manager will receive a final task to **Provide Final Comments**. Enter in your status, and comments if applicable and hit **Submit**.

15. If applicable, this will go to your supervisor to Review the Manager Evaluation and Approve to go in the employee's electronic file. The employee will see this under their personal profile under Worker History.



Note: If completing this task, make sure you start this action timely. You cannot submit more than one disciplinary action for the same period.