Tips and Guidelines for Completing Disciplinary Documents

Throughout the Document Make Sure to:

- Write in the Third-person tense (Do not include "I", "we", "me" or "us".)
- Write out all abbreviations
- Include job titles after the first time an associate's name is written, then write names from there on out.

Specific Guidelines for Each Section:

Areas Identified for Performance Improvement/Current Concerns/ Summary of Issues

- Provide multiple examples to establish the pattern of behavior or lack of performance
- Include dates and specific details
- List dates in chronological order
- Write facts, leave out emotions or anything that cannot be proven
- Include associate's responses to when the concerns were addressed by management
- If multiple concerns need to be addressed, section the examples out by "Theme" (Theme examples: Attendance, Job Performance, Unprofessional conduct etc..)

Previous Action Taken

- List dates in chronological order, including details of coaching conversations
- Detail the pattern of coaching in order to prove that the associate is aware of the expectations being addressed

Required Standards/Company Policy

- Copy and paste from the Associate Handbook that pertain to the concerns being addressed
- Copy and paste from the associate's Job Description that they are not meeting expectation

Action Plan

- Describe in detail the action needed from the associate, including the appropriate and reasonable timeline of when they are to appropriately meet expectations.

Follow Up

- Describe when and how the process of checking in on associate's progress is going to take place.

Resources Provided by Manager

- Be specific about on-going and new resources being provided to support the associate's success.

For further assistance please contact HR through ServiceNow