

Add Approver: Skipping a Step in Progressive Discipline

This guide is for managers who need to skip a step in progressive discipline by advancing directly to a written warning instead of a verbal warning first. In some instances, managers may advance directly to a written warning, when the behavior warrants more than issuing a verbal warning first. However, when advancing directly to a written warning, the appropriate Employee Relations Partner must be contacted in advance of this action and added as an “approver” in the Workday business process.

1. Complete the Manager Evaluation and click “Next.” Add supporting documentation and click “Next” again. Review for accuracy and click “Submit.”

The left screenshot shows the 'Description' section of the Manager Evaluation process. It contains two questions: 'Summary of incident and unacceptable behavior/performance' and 'What is the impact on others and/or the workplace?'. Both questions have a 'Manager' role and a 'Normal' answer type. The right screenshot shows the 'Supporting Documents (Not Viewed)' section, which includes a 'Manager Summary' and a 'Comment' field. At the bottom, there are 'Submit' and 'Save for Later' buttons.

2. Go to “My Tasks” and “Approve” the manager evaluation. You will not be able to add an approver until you complete this step.

The screenshot shows the 'Review' page for a Manager Evaluation: Written Warning. It includes a 'View Details' button and a 'Process History' section with the following steps: 'Complete Manager Evaluation for Disciplinary Action- Submitted', 'Review Complete Manager Evaluation- Not Required', 'Review Draft Disciplinary Action- Not Required', and 'Review Draft Disciplinary Action- Not Required'. At the bottom, there are 'Approve', 'Send Back', and '...' buttons.

Office of Human Resources
Quick Reference Guide (QRG)



3. Go to “My Tasks” again and Click Add Approvers

This screenshot shows the 'Review' screen for a 'Manager Evaluation: Written Warning'. The header is red with the title 'Review' and a three-dot menu icon. Below the header, it says 'For Written Warning:'. The 'Overall Process' is 'Manager Evaluation: Written Warning:' and the 'Overall Status' is 'In Progress'. There is a 'Details to Review' section with a 'View Details' button. Below that is a 'Process History' section with a list of five items, each preceded by a blue cloud icon. The items are: 'Complete Manager Evaluation for Disciplinary Action- Submitted', 'Review Complete Manager Evaluation- Not Required', 'Review Draft Disciplinary Action- Not Required', 'Review Draft Disciplinary Action- Not Required', and 'Review Draft Disciplinary Action- Not Required'. At the bottom, there are four buttons: 'Approve' (red), 'Send Back' (white), 'Add Approvers' (white), and 'Cancel' (white).

4. Select your Employee Relations Consultant and click “Approve and Send to Approvers.”

This screenshot shows the 'Add Approvers' screen. The title is 'Add Approvers'. Below it, a message says 'The next step in the process will not happen until the additional approvals are done.' There is a section for 'Additional Approvers' with a red asterisk. It contains a search bar with 'Trena Bronson' entered and a three-dot menu icon. Below the search bar is a 'Comment' field. A dropdown menu is open, showing 'Employee Relations' with a left arrow. Below the dropdown, there is a list of users. The first user is 'Trena Bronson', a 'Senior Employee Relations Consultant | OHR | Employee Relations', with a blue checkmark and a three-dot menu icon. At the bottom, there are two buttons: 'Approve and Send to Approvers' (red) and 'Cancel' (white).

5. After Employee Relations approves the disciplinary action, you will receive a To Do step to discuss with the employee. Follow the steps provided in Workday.