Talent Management - Initiating a Corrective Action Plan

Overview
This instructional guide identifies the steps necessary to launch a corrective action plan (CAP) in the Talent Management system. Human Resource (HR) staff (security role codes A, H and X) are able to initiate an employee into a CAP.

Note: The process of initiating an employee into a CAP can only be completed by HR (security role codes A, H and X). Managers and HR staff will not be able to call the People First Service Center to request an employee be placed on a CAP.

Process Steps
Follow these steps to initiate an employee into a CAP:

Step 1: Log in to People First.

Step 2: Select the Talent Management tile.
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**Step 3:** Select Admin Center within the Home navigation dropdown menu.

**Step 4:** Enter Launch Forms in the Admin Center’s Tools search field; then select Launch Forms within the search results.

**Step 5:** Select Corrective Action Plan from the Form Template dropdown; then select Next.
Step 6: Select Next.

Step 7: Select Next.
- By default, the “Start date” for the form is the current date and the “End date” and “Due date” is set as 30 (thirty) days from the “Start date”.
- To set custom dates; set the radio button for “Custom”; select the dates; then select Next.
Step 8: Set the radio button for “One Employee”; enter the employee’s name in the search field; select the employee’s name from the results; then select Next.

Step 9: Review the Summary details; then select Launch.
Step 10: Select OK to confirm the launch.

Step 11: The final step provides notification that the plan creation is in progress. Select Close.

Step 12: At this point, your assigned HR staff should sit down with the manager and enter the CAP expectations and requirements. It is strongly recommended that HR do this with the manager and not leave the manager on their own for this process.