



IDPs and Best Practices



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Agenda

- The IDP as a trusted source document
- The IDP tennis ball approach
- Creating and submitting an IDP
- Adding Goal Activities
- Trouble Shooting and Best Practices
- Available Training Resources on IDPs



IDP - a Trusted Source Document

- Employee and Supervisor:
 - are the authoritative owners of the employee's IDP
 - are responsible for maintaining the accuracy and timeliness of the IDP
 - are aware that other parts of the agency may consume this information for planning purposes
 - are aware of the control mechanisms in place to secure and protect the information in the IDP



IDP like a Contract



A contract that is written but never submitted is worthless



IDP that is past its expiration date still in DRAFT status

A contract that is submitted but never approved is worthless



IDP that is past its expiration date still in Submit/Pending status





IDP like a Contract

- IDP is like a contract between employee and supervisor - only supervisor or employee can make changes or update status of an IDP
- All info added and changes made must be documented and approved by both parties within the time frame of the plan period
- IDP created but not submitted for approval before expiration date is worthless
- IDP submitted but not approved before expiration date is worthless

IDP as a Tennis Ball

- Only one player has the ball at any time
- Employee begins game by creating IDP
- Submit for Approval sends IDP “over the net” to supervisor
- No additional play (changes) by employee until after supervisor approves or rejects plan and sends it back “over the net” to the employee
- Take action **ONLY** when the ball is in your court!



The Status of an IDP

- Draft – new, never submitted
 - Encourage users to submit Drafts early in the Plan Period so that:
 - Work can begin as soon as possible on the yearly goals
 - Potential problems with submission can be detected early in the year



The Status of an IDP

- Submitted/Pending – changes made, awaiting action
 - Both user and supervisor can put plan into this status
 - Use tennis ball approach to avoid confusion



The Status of an IDP

- Rejected – rejected, awaiting action
 - Other party must acknowledge
- Active/Approved – no action needed
 - Changes can still be made
 - Changes will put plan back into Submit Pending status
- Inactive/Approved – no action needed. Begin date of plan period is in the future





The Status of an IDP

- Superseded – newer plan, overlapping dates
 - Ex: Calendar year 2010 plan in place when a fiscal year 2011 plan created
 - Goals can be moved from superseded plans to active plans
- Expired – Past Plan Period
 - Plans must be in Active Approved status BEFORE expiration date
 - Plans not in this status can cause problems



Creating An IDP



Tips Before You Begin

- Identify your supervisor in your AgLearn Profile.
- Required fields are marked with a red asterisk.
- Use the Calendar icon to enter dates
- Use the AgLearn Back link to move backwards, NOT the browser back button





Creating an IDP

- Create a New Plan
- Select a Plan Period (FY or CAL)
- Add a Simple Goal (Meet with my supervisor, identify my training needs, etc)
- Submit for approval
- WAIT for approval
- THEN add goals, activities, update status and resubmit



Create a New Plan

- Select the **Career** tab



- Click **Create New Plan**

10/1/2007 12:00 AM America/New York	9/30/2008 12:00 AM America/New York	View Plan Notes
10/1/2008 12:00 AM America/New York	9/30/2009 12:00 AM America/New York	View Plan Notes



Create New Plan

Add Information to Your Plan

- Enter a title for your Plan (e.g., FY2010 IDP)

Create My Plan

You have chosen to create a new plan. Enter the overall details for this plan and save.

Plan Information

* Plan Title:

* Plan Period:

Plan Purpose:

Effective Date:
(MM/DD/YYYY)

Expiration Date:
(MM/DD/YYYY)

Tip: Use a similar naming convention for plan titles so that they appear in order in your reports

Select a Plan Period

- Click Select (next to Plan Period).



Create My Plan

You have chosen to create a new plan. Enter the overall details for this plan and se

Plan Information

* Plan Title:

* Plan Period: [Select Clear](#)

Plan Purpose:

Effective Date:
(MM/DD/YYYY)

Expiration Date:
(MM/DD/YYYY)



Select a Plan Period

- Click **Select** to choose a Date Period.



Date Period ID	Description	
CY2008	Calendar Year 2008	Select
CY2009	Calendar Year 2009	Select
FY08-2019	USE ONLY FOR IDP PROBLEM FIX	Select
FY2008-2009	Fiscal Year 2008 Through 2009	Select
FY2009	Fiscal Year 2009	Select
FY2009 (alt)	Fiscal Year 2009 alternative	Select
FY2010	Fiscal Year 2010	Select
FY2010 (alt)	Fiscal Year 2010 alternative	Select
FY2019	Fiscal Year 2019	Select
Q1FY08	First Quarter Fiscal Year 2008	Select

Review the IDP Dates

- Choosing a Plan Period from the list automatically populates the Effective Date & Expiration Date.

Create My Plan

You have chosen to create a new plan. Enter the overall details for this plan and select **Add** to create it.

Plan Information

* Plan Title:	<input type="text" value="FY2010 IDP"/>
* Plan Period:	<input type="text" value="Fiscal Year 2010"/> Select Clear
Plan Purpose:	<input type="text"/>
Effective Date: (MM/DD/YYYY)	<input type="text" value="10/1/2009"/>
Expiration Date: (MM/DD/YYYY)	<input type="text" value="9/30/2010"/>



Add the New Plan

- Click the Add button.

<u>Complete</u>	Percent Toward Target	Select
No		<input type="checkbox"/>

[Select All](#) / [Deselect All](#)

Copy Activities

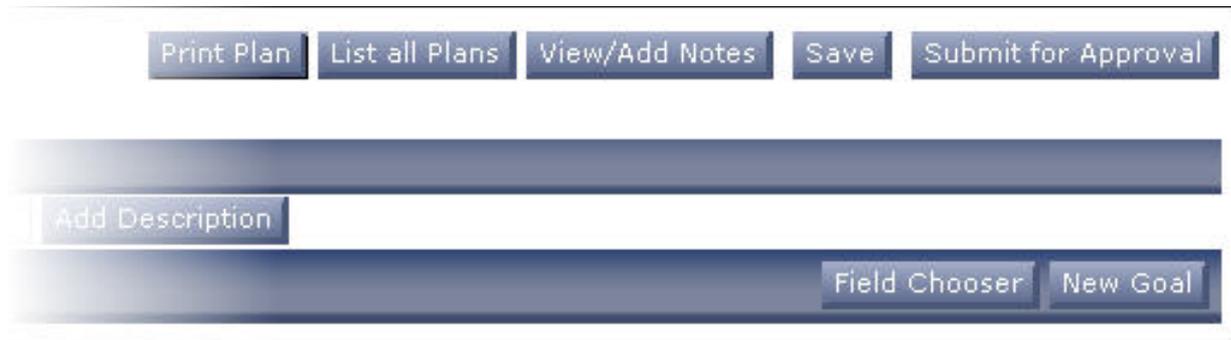
Adding Goals

- What you want to learn
 - Measurable target, tied to a calendar date
- Each Plan needs at least one Goal
- Required fields:
 - Goal Name
 - Section
 - Target Date



Add a New Goal

- Click the **New Goal** button



The screenshot shows a software interface with a dark blue header bar containing five buttons: "Print Plan", "List all Plans", "View/Add Notes", "Save", and "Submit for Approval". Below the header is a large, empty text input field. Underneath the input field is a dark blue bar with two buttons: "Field Chooser" and "New Goal". A green arrow points upwards to the "New Goal" button.

- Goals may be pre-populated if competencies have been assigned (based on competency gaps)

Number & Name Your Goal

- Number must be unique
 - Leave gaps to insert goals later
- Enter a Goal Name.

* = Required Fields

Goal Details

Goal Type: Other

→ Goal Number:

→ * Goal Name:

Goal Description:

Goal Category:

* Section:

Select a Goal Section

- Click the **Section** drop-down list
- Select a section from the list

* = Required Fields

Goal Details

Goal Type: Other

Goal Number: 10

* Goal Name: Become more proficient in Word Macros

Goal Description: In order to streamline our document formatting processes, I would like to be able to create Word Macros to automate some of the tasks

Goal Category: Select | Clear

* Section: -- Please Select One --
-- Please Select One --
All Goals

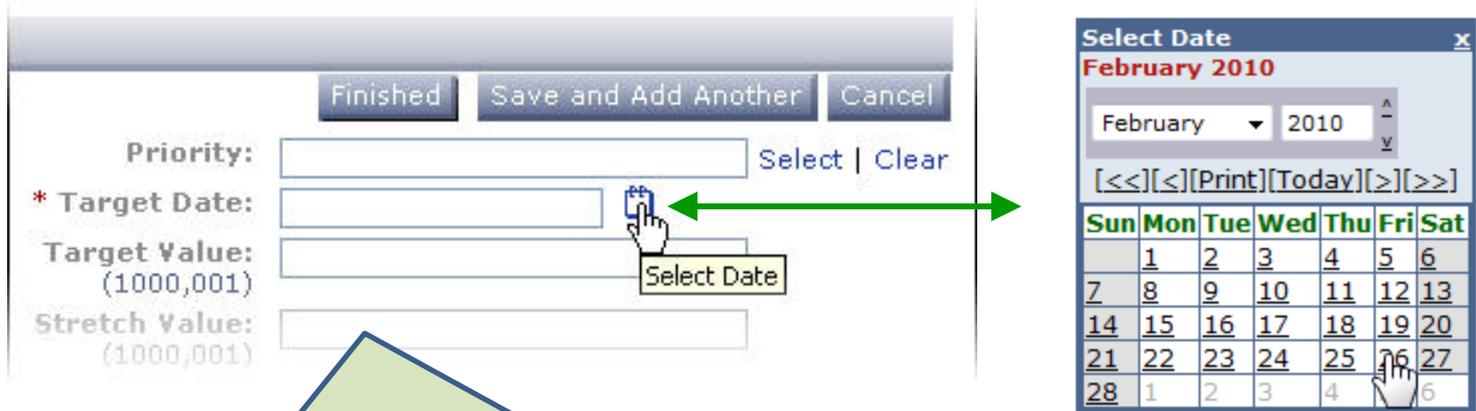


TIP: Ignore Goal Category unless in FSA

TIP: Select the All Goals section to keep it simple

Enter a Goal Target Date

- Click the Calendar icon
- Select the year, month and day for your target



The image shows a screenshot of a web application interface for entering goal information. The form includes fields for Priority, Target Date, Target Value (with a unit of 1,000,001), and Stretch Value (with a unit of 1,000,001). A green arrow points from the Target Date field to a 'Select Date' button. To the right, a 'Select Date' dialog box is open, showing 'February 2010' and a calendar grid. The calendar grid shows the days of the month, with the 25th highlighted.

Finished Save and Add Another Cancel

Priority: Select | Clear

* Target Date:  Select Date

Target Value:
(1000,001)

Stretch Value:
(1000,001)

Select Date

February 2010

February 2010

[<<][<][Print][Today][>][>>]

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6

TIP: Target value and Stretch Value are not required fields but do help to identify a way to track the status of your goal.

Complete Your Goal

- Click the Finished button.



Finished

Save and Add Another

Cancel

Priority:

Select | Clear

* Target Date:

02/26/2010



Target Value:

(1000,001)

Stretch Value:

(1000,001)



Save and Submit Your Plan

- **Save** your Plan
- **WAIT!!!!!!** Is your current supervisor listed in AgLearn? If not, fix it now!
- Click **Submit for Approval**
- **STOP! Don't change anything until your supervisor acts on the plan!!!**

 This plan contains changes that have not been approved.

Print Plan

List all Plans

View/Add Notes

Save

Submit for Approval



Note Your Plan Status

- After you submit your plan, it moves from DRAFT to Submit/Pending status
- Check who has next action with status icon

Plan now is in **Submit/Pending** status

Plan Title :
Amy Alabama FY10 IDP ([Select Other Plan](#))

Plan Status :
Submit/Pending (Submitted for approval on 11/30/2009) ▾

Effective Date:
10/1/2009

Click the **Plan Status Triangle** to see table below:

Plan Status :
Submit/Pending (Submitted for approval on 11/30/2009) ▾
Effective Date:
10/1/2009

Performance **Development**

Step No.	Action?	Name	Approved Date
1	Submitted	Alabama, Amy	11/30/2009
2		Fallow, Kathy T	



Note that the email is a cc of one sent to the supervisor.

Check Your Email



- Review your email (cc of email sent to your supervisor)
- Email directs your supervisor to login to AgLearn and review your IDP as soon as possible
- **Do nothing more** until you receive another email saying that your IDP has been approved (or rejected)



Questions?

Supervisor View of IDPs

- Email notifies of submitted plan
- Login to AgLearn
- Alert links to review page
- Click **Review** button

Alerts

- You have Subordinate Plans that require Review and Approval»
- You have overdue learning»



Pending Reviews and Approvals

This view shows you all of the review and approval actions you have been asked to perform. It is divided into two primary sections: reviews and approvals for performance management Activities such as competency assessments (only if available); and approvals for training requests. You may switch between sections by clicking on the appropriate section header. Within each section you will find a list of specific reviews or approvals you are being asked to perform, categorized by action type.

Performance Management (1) Training (0)

Performance Management

Subordinate Plan Approvals (1)

Review Subordinate

User Name	Plan Title	Plan Period	Plan Status ▲	Effective Date	Approval Date	Expiration Date	Review Type	Action
Alabama, Amy	Amy Alabama FY10 IDP		Submit/Pending	10/1/2009		9/30/2010	New Plan	Review





Supervisor Actions

- Approve, Reject, View/Add Notes



- Can also print or view other plans
- Plan status then changes to Active/Approved

Viewing: **Amy Alabama**
No Job Position Title [\[Return to Org Chart\]](#)

My Plans and Goals

The details of this plan are shown below. This Plan has been supporting Activities for those Goals. However, if you have not been reflected in the Performance Review. You may view or add a different Plan. If you have been designated as a Coach, you

All training or activities entered and approved on an e-development activities will be considered and authorized

Plan Title :
Amy Alabama FY10 IDP ([Select Other Plan](#))

Plan Status : 
Active/Approved (Expires 303 days from now) ▶

Effective Date:
10/1/2009



Updating Your Plan

- Once approved, plan moves to Active Approved status
- You can now make changes:
 - Add goals
 - Update status of existing goals
 - Add goal activities

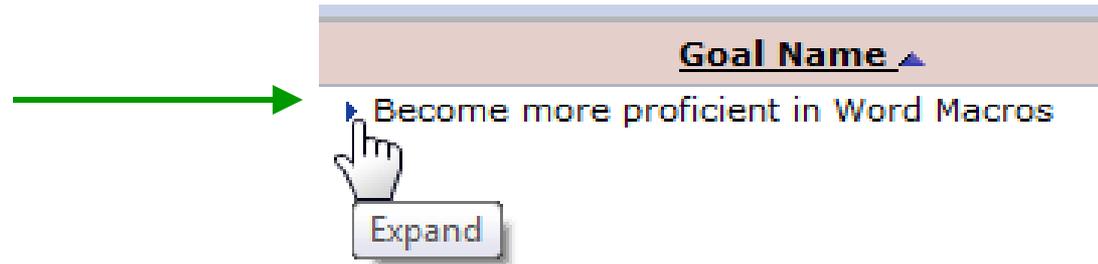
Activities

- What you will do to reach your Goals
 - Classes, conferences, online learning
 - OTJ training, committees, etc.
- Two types of Activities:
 - External
 - Internal
- Required fields:
 - Activity Name
 - Target Date

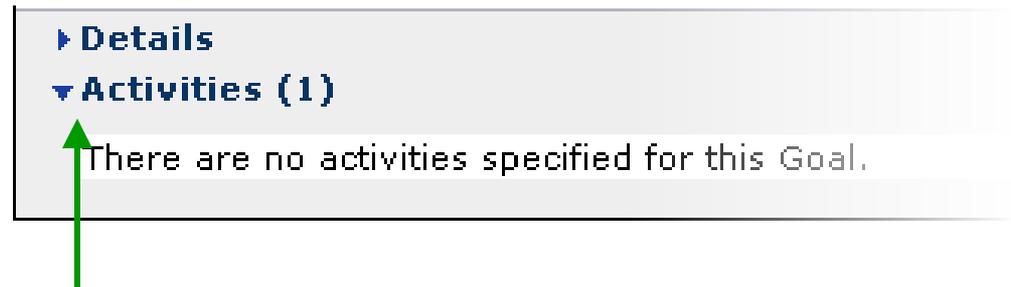


Add Activities to Your Goals

- Expand the Goal (click Goal triangle)



- Expand the Activities (click Activities triangle)



Add an Internal Activity

- Click **Search for Activity**
- Enter keywords to search for (*or exact course title*)
 - Select **Online** item type
 - If course title, select **Exact Phrase**



Learning Item Activity Search

Item Type: Instructor-Led Online Other Blended (Select one or more)

Keywords: Exact Phrase

Search

- Click **Search**

Add an Internal Activity (cont'd)

- In Select Column, check each learning item to add as an Activity.
- Click **Add**

The screenshot displays a software interface for adding an internal activity. At the top right, there are 'Add' and 'Cancel' buttons. Below them are links for 'Select All' and 'Deselect All'. The main area contains a table with two columns: 'Activity Description (Rating)' and 'Select'. The 'Select' column has a checked checkbox. At the bottom, there are 'Add' and 'Cancel' buttons. A green arrow points to the 'Add' button at the bottom, and another green arrow points to the checked checkbox in the table.

Activity Description (Rating)	Select
	<input checked="" type="checkbox"/>

Add an External Activity

- Click Create New Activity
- Enter Activity Name in field
- Enter Target Date, Target Value and Stretch Value (if desired)
- Click Add



Add Activity - Baking Bread

* = Required

Activity Type : External

* Activity Name :

* Target Date : 

Priority : [Select Clear](#)

Target Value :
(1000,001)

Stretch Value :
(1000,001)





Submit Changes for Approval

- Submit IDP for Approval after you have made changes and want your supervisor to review and approve
- Once approved, the “not approved” warning message disappears



ing Activities for those Goals. You must submit the Plan for Approval. Once approved Goals and Activities are reflected in the Performance Review. You e side of the current plan Title and select a different Plan. If you have been

 This plan contains changes that have not been approved.

Save and Print Your Plan

- Run the **My Plan** Report
- Choose **Local File** Destination
- Choose **PDF** Format

Report Destination: Browser Local File

Report Format: XML CSV HTML PDF

Reports

Select a Report from

Report Name
Close-Fit Jobs
Curriculum Status
Item Requests
Item Status
Learning History
Learning Hours
Learning Needs
Learning Plan
My Plan
Tuition
User Information

- Enter effective date range
- Click **Run**
- Save PDF to your PC and print



Trouble Shooting the most common problem: User has no Submit for Approval Button on their current plan

The List All Plans Screen

- Tell user to click **Career** menu, then click the **List all Plans** button 
- Take a screen shot of this screen:



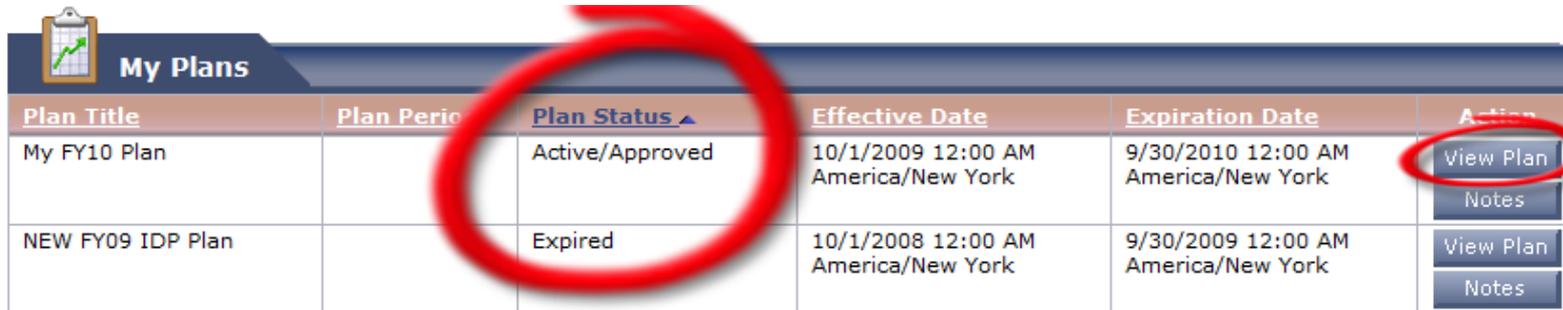
The screenshot shows a web interface titled "My Plans" with a clipboard icon. It contains a table with the following columns: Plan Title, Plan Status, Effective Date, Expiration Date, and Action. Red arrows point to the Plan Status, Expiration Date, and Action columns.

Plan Title	Plan Status ▲	Effective Date	Expiration Date	Action
My FY10 Plan	Active/Approved	10/1/2009 12:00 AM America/New York	9/30/2010 12:00 AM America/New York	View Plan Notes
NEW FY09 IDP Plan	Expired	10/1/2008 12:00 AM America/New York	9/30/2009 12:00 AM America/New York	View Plan Notes
Fiscal Year 2009 IDP	Superseded	10/1/2008 12:00 AM America/New York	9/30/2009 12:00 AM America/New York	View Plan Notes
REVISED FY09 Plan	Superseded	10/1/2008 12:00 AM America/New York	9/30/2009 12:00 AM America/New York	View Plan Notes

- Look at **Plan Status, Expiration Date** and **Action** column

Check the Status of Your IDP

- Check the Plan Status column



My Plans

Plan Title	Plan Period	Plan Status ▲	Effective Date	Expiration Date	Action
My FY10 Plan		Active/Approved	10/1/2009 12:00 AM America/New York	9/30/2010 12:00 AM America/New York	View Plan Notes
NEW FY09 IDP Plan		Expired	10/1/2008 12:00 AM America/New York	9/30/2009 12:00 AM America/New York	View Plan Notes

- Expand the Status icon

Plan Title :

Amy Alabama FY10 IDP ([Select Other Plan](#))

Plan Status :

Submit/Pending (Submitted for approval on 11/30/2009) ▶

Effective Date:

10/1/2009

Submitted for approval on 11/30/2009 ▼

10/1/2009

Performance

Development

Step No.	Action?	Name	Approved Date
1	Submitted	Alabama, Amy	11/30/2009
2		Fallow, Kathy T	



User Not Sure If Submitted

- User has already submitted the plan and has forgotten
 - Send user the FAQ document
 - Ask user to expand the plan status icon
 - Status table will reveal who should take the next action
 - Have user contact supervisor to take action on the plan



Older Plan in Draft Status

- An older plan (one whose expiration date is past the current time frame) is causing problems
 - If older plan is in **Draft** status, have user delete the plan
 - User may need to log out and back in to see Submit button on current Draft plan

Older Plan in Expired Status

- Have user check the Action column of the **List All Plans** screen for a **Review** button. Click Review button, follow instructions, log out; back in.



Plan Title	Plan Period	Plan Status ▲	Effective Date	Expiration Date	Action
2010 idp		Draft	10/1/2009 12:00 AM America/New York	9/30/2010 12:00 AM America/New York	View Plan Delete Notes
TRAINING		Expired	1/7/2008 12:00 AM America/New York	9/30/2008 12:00 AM America/New York	View Plan Notes
IDP		Expired	10/1/2008 12:00 AM America/New York	9/30/2009 12:00 AM America/New York	View Plan Review Notes

Expired?

- Older Expired plans should never be deleted and do not cause problems unless there is a corresponding **Review** button that has had no action.





Older Plan in Submit/Pending Status

- Run an IDP by Learner custom report
- Ask user to take screen shot of his **List All Plans** screen
- Submit ATS ticket with attached screen shot of List All Plans Screen and IDP by Learner Report



Plan submitted to wrong
supervisor



Plan Submitted to Wrong Supervisor

- If the plan is still in Submit/Pending status, have the user (***not you***) access the profile in AgLearn and make the change to the correct supervisor
- Plan will be automatically rejected
- User can now view the plan and submit to the correct supervisor



Plan Submitted to Wrong Supervisor

- If the plan is in Active Approved status have the user change the profile and select the current supervisor
- When changes are made to the plan, they will now be submitted to the new supervisor

Summary

- IDP is a Trusted Source document – only supervisors and subordinates can make changes
- Get the IDP out of Draft status early so that goals can be identified and progress tracked
- Remember the tennis ball approach, only change the plan with the ball is in your court





Summary (cont'd)

- Make sure supervisor and email are in profile before the IDP is submitted
- Plans usually move from Draft to Submit/Pending, to Active Approved, then back and forth between Submit/Pending and Active Approved until they expire.
- You can add goals, activities and update status throughout the year

Summary (cont'd)

- View the List All Plans screen to view the status and Actions possible for all plans
- Expand the Plan Status icon to see who's responsible for taking the next action on the IDP





Summary (cont'd)

- Activities identify what you will do to reach your goal
- Activities can be internal or external
- Run a My Plan report to save and print your plan
- The FAQ document should be reviewed before calling the Help Desk



Summary (cont'd)

- If there is no Submit Button:
 - Check the List all plans screen
 - Plan may be already submitted
 - If older plan is in Draft status, delete it
 - If older plan is in Expired status with Review button, review it
 - If older plan is in Submit/Pending status, send to Lead so that he can attach IDP by Learner Report and List All Plans screen shot to ATS ticket

Summary (cont'd)

- Plans submitted to wrong supervisor:
 - If plan is still in Submit/Pending status, user changes profile, plan gets rejected and user can resubmit
 - If plan is in Active Approved status, user changes profile, then submits to new supervisor when changes are made





Best Practices

- Create and submit your plan for approval early in the year
- Supervisors – Approve the initial plan as soon as you receive it to place the plan in Active Approved status
- Remember that approval of a plan is not a guarantee of training!
- Remember the tennis ball approach – only make changes when the ball is in your court!

Training/Job Aids

- IDP FAQs:
 - https://aglearn.usda.gov/customcontent/JobAids/IDP_FAQs.pdf
- Update your AgLearn profile:
 - <https://aglearn.usda.gov/scorm-content/JobAids/UpdatingYourAgLearnProfile.pdf>
- Take online training
 - From www.aglearn.usda.gov, click **Help**
 - Launch **How to Create Your IDP**
 - Skip section on adding competencies





You Made It!
Questions?
Thanks for Attending!