



Individual Development Plans (IDPs)

*MRPBS HRD Training and Development Branch
August 2011*



Call-in Number: 888-858-2144, Passcode: 7482640#

Agenda

- The IDP as a trusted source document
- The IDP tennis ball approach
- Creating and submitting an IDP
- Adding Goal Activities
- 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 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 – Draft plan has been submitted, 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- Superseded – newer plan, overlapping dates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 - Goals can be moved from superseded plans to active plans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

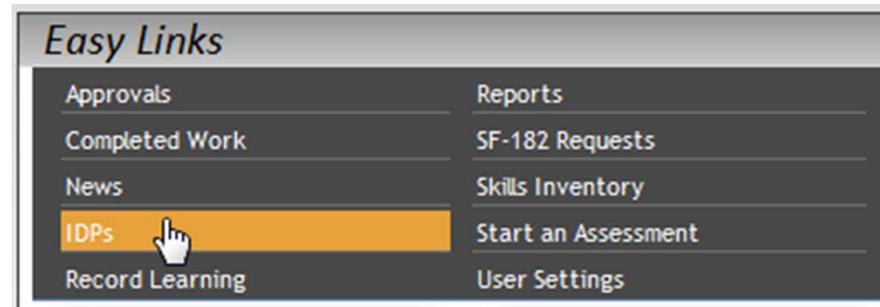


Creating an IDP

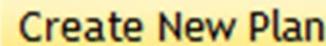
- Create a New Plan
- Select a Plan Period (FY or CAL)
- Add a Simple Goal (Meet with my supervisor, identify my training needs, etc)
- Submit for approval
- WAIT for approval
- THEN add goals, activities, update status and resubmit

Create a New Plan

- Click the **IDPs** Easy Link



- Scroll to bottom of existing plans, then click **Create New Plan**

A yellow rectangular button with a thin black border and a light blue shadow. The text 'Create New Plan' is centered on the button in a black, sans-serif font. A mouse cursor is positioned at the bottom right corner of the button, pointing towards it.

Add Information to Your Plan

- Enter a title for your Plan (e.g., FY2012 IDP)

Create My Plan

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

Plan Information

* Plan Title:

* Plan Period: [Select Clear](#)

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).

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.

Plan Information

* Plan Title:

* Plan Period: [Select](#) [Clear](#)

Plan Purpose:

Effective Date:
(MM/DD/YYYY)

Expiration Date:
(MM/DD/YYYY)

Records per Page Page: [1](#) [2](#) [3](#) «Previous [Next](#)» (26 total records) Page of 3. [Go](#)

Date Period ID	Description	
FY2010	Fiscal Year 2010	Select
FY2010 (alt)	Fiscal Year 2010 alternative	Select
FY2011	Fiscal Year 2011	Select
FY2012	Fiscal Year 2012	Select
Q1FY09	First Quarter Fiscal Year 2009	Select

Review the IDP Dates

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

Plan Information

* Plan Title:

* Plan Period: [Select](#) [Clear](#)

Plan Purpose:

Effective Date:
(MM/DD/YYYY)

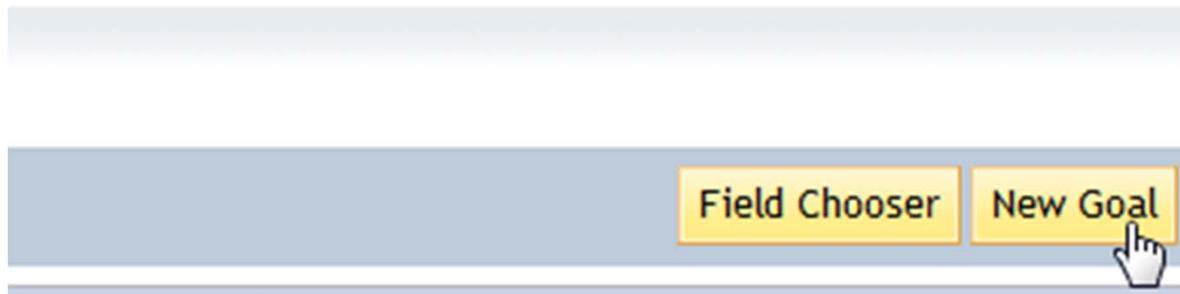
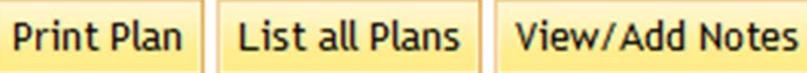
Expiration Date:
(MM/DD/YYYY)

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
 - Target Date

Add a New Goal

- Click the **New Goal** button



Number & Name Your Goal

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

Goal Details

Goal Type: Other

Goal Number:

* Goal Name:

Goal Description:

Select Additional Criteria to Define Your Goal

- Fields that appear can be configured with **Field Chooser**
- Check agency guidance about which fields to display

Goal Details

Goal Type: Other

Goal Number:

* Goal Name:

Goal Description:

Goal Category:

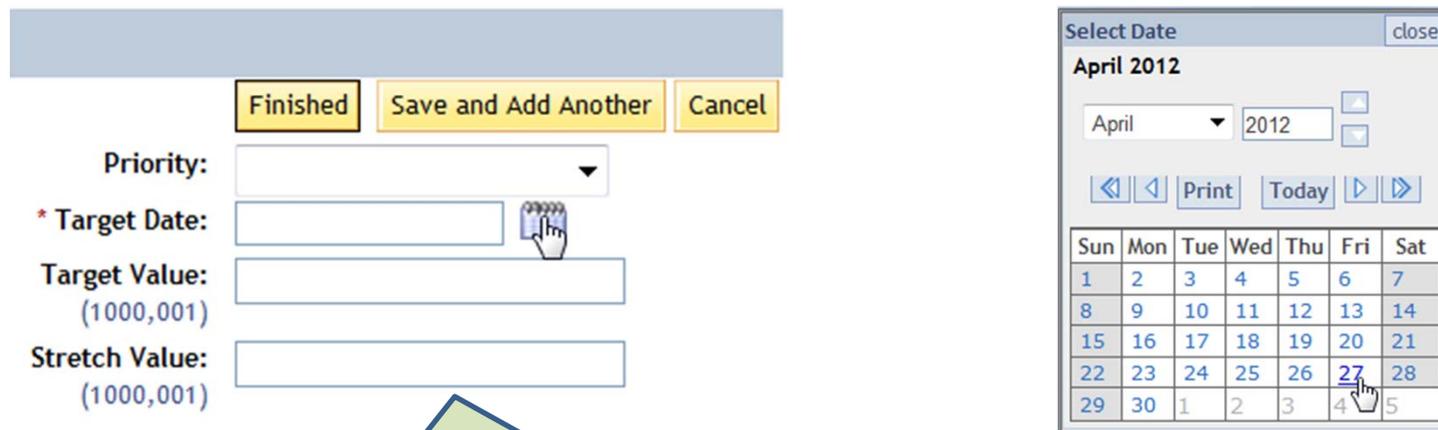
Section:

TIP: Ignore
Goal Category

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

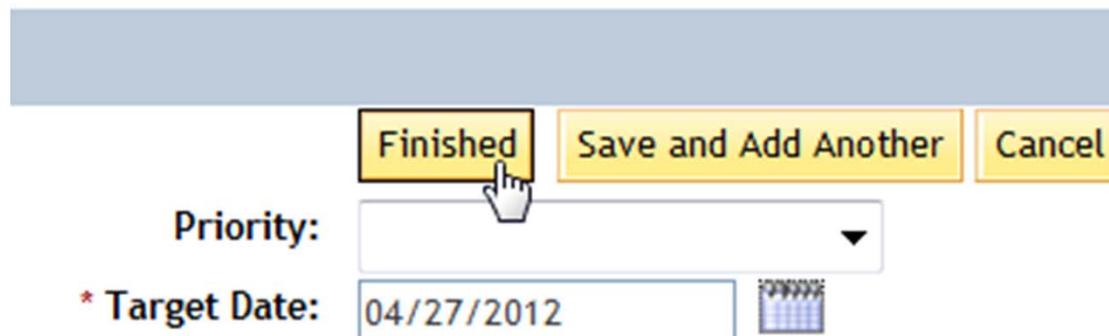


The image shows a screenshot of a web form for entering goal information. At the top, there are three buttons: "Finished", "Save and Add Another", and "Cancel". Below these are four input fields: "Priority:" (a dropdown menu), "* Target Date:" (a text box with a calendar icon), "Target Value:" (a text box with "(1000,001)" below it), and "Stretch Value:" (a text box with "(1000,001)" below it). To the right, a "Select Date" dialog box is open, showing "April 2012". It has dropdowns for "April" and "2012", and buttons for "Print", "Today", and navigation arrows. A calendar grid shows the days of the month, with the 27th highlighted and a mouse cursor over it.

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

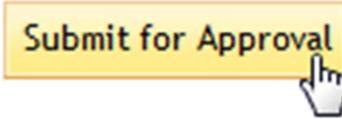
Complete Your Goal

- Click the Finished button.



A screenshot of a web form interface. At the top, there is a light blue horizontal bar. Below it, three yellow buttons are displayed: "Finished", "Save and Add Another", and "Cancel". A mouse cursor is pointing at the "Finished" button. Below the buttons, there are two input fields. The first is labeled "Priority:" and is a dropdown menu. The second is labeled "* Target Date:" and contains the text "04/27/2012". To the right of the date field is a small calendar icon.

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** 
- Don't change anything until your supervisor acts on the plan

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 : FY11 IDP Kathy Fallow Plan Period : Fiscal Year 2011
[\(Select Other Plan\)](#)

Plan Purpose : Testing of IDP Features
 Version : 0 (current) ▼

Plan Status: Submit/Pending
 (Submitted for approval on 12/27/2010)
 Effective Date: 10/1/2010 Expiration Date: 9/30/2011

Expand the **Plan Status** icon to see table below:

Step No.	Action?	Name	Approved Date
1	Submitted	Fallow, Kathy T	12/27/2010
2		Kafshi, Ali A	

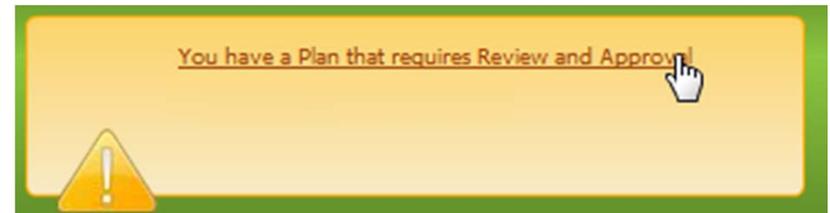
Check Your Email

- Review your email from AgLearn.System@ocio.usda.gov . This is a **cc** of the 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 the **Performance Management** tab



Pending Reviews and Approvals Help

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 (9)

Link to Performance Management Tab

Training

Internal Training (2)

Enter Reasons for Approvals or Denials
 All
 Direct Reports Only
 Next

User Name ▲	Title	Price	Type	Action [Approve All/Deny All]
-------------	-------	-------	------	-------------------------------

Supervisor View of Plans Waiting for Action

+ Scroll to plan that requires action and click **Review**

Subordinate Plan Approvals (2)

Review Subordinate

User Name	Plan Title	Plan Period	Plan Status ▲	Effective Date	Approval Date	Expiration Date	Review Type	Action
Neon, Pam	MY 2011 IDP	Calendar Year 2011	Active/Approved	1/1/2011		12/31/2011	Plan Revision	Review
Allen, Ann	MY 2011 IDP	Calendar Year 2011	Submit/Pending	1/1/2011		12/31/2011	New Plan	Review

Supervisor Actions

- Approve, Reject, View/Add Notes
- Can also print or view other plans
- Plan status then changes to Active/Approved

Plan Status: Submit/Pending
(Submitted for approval on 1/31/2011) +

Effective Date: 1/1/2011 Expiration Date: 12/31/2011

[Print Plan](#)
[List all Plans](#)
[View/Add Notes](#)
[Approve](#)
[Reject](#)

Development

Title: [Add Description](#)

Group By: Section ▾ View Changes? No ▾

— Section Name: None(1)

Goal Name ▲	Target Date	Priority	Percent Toward Target	Action	Remove
+ Become more proficient in Microsoft Office	4/27/2011	Medium Priority		View/Add Notes	

Updating Your Plan

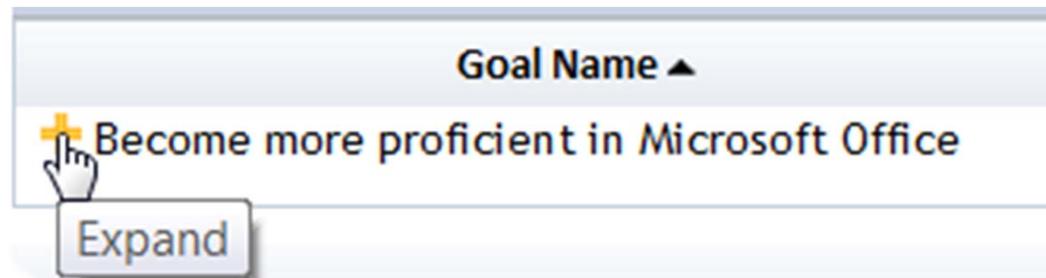
- Once approved, plan moves to Active Approved status
- You can now make changes:
 - Add goals
 - Update status of existing goals
 - Add goal activities

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 + Icon)



Add an Internal Activity

- Click **Search for Activity**
- Enter keywords to search for (*or exact course title*)
 - Select 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**

Item Search Results

Title	Competency Description (Rating)	Select
Using Tables, Charts, and Graphics in Word 2007		<input type="checkbox"/>
Working with Pivot Tables and Charts in Microsoft Office Excel 2007		<input checked="" type="checkbox"/>
Working with Tables, Charts, and Diagrams in Microsoft Office PowerPoint 2007		<input type="checkbox"/>

Records per Page 10 (9 total records)

[Select All / Deselect All](#)

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**



Activity Type : External

* Activity Name :

* Target Date :

(MM/DD/YYYY)

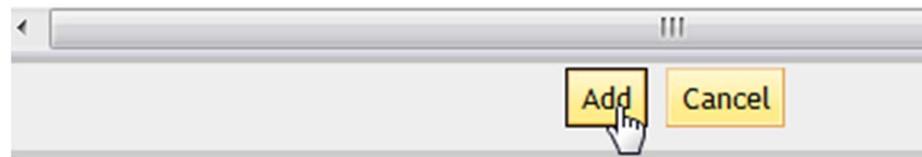
Priority :

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

 This plan contains changes that have not been approved.

Currently this plan is pending approval. We recommend you make no additional changes until the submitted version is either approved or denied.

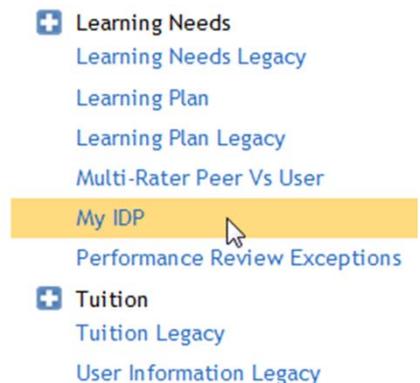
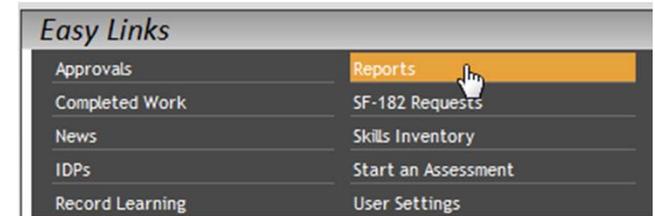
Save and Print Your Plan

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

Report Destination: Browser Local File

Report Format: XML CSV HTML PDF

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



Common Issues

My employee is close to retirement and does not want an IDP

Supervisor must add “IDP Declination” to employee’s learning history

My employee has no computer access

Supervisor must add “APHIS Paper-Based IDP” to employee’s learning history

AD-881 must be used

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 move from Draft to Submit/Pending, to Active Approved, then remain Active until they expire.
- You can add goals, activities and update status throughout the plan period

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 job aid should be reviewed before calling the Help Desk

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
- My employee declines or prefers paper-based
 - “IDP Declination”
 - “APHIS Paper-Based IDP”

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!

aglearn+

adding to your knowledge