

## Transcript for The Top Ten Most Frequently Asked Questions About the AgLearn IDP

Slide 1 Hello. My name is Kathy Fallow and I'm with Team AgLearn. I presented a live webinar on Ten Most Frequently Asked Questions about the AgLearn IDP. On March 7<sup>th</sup>, 2012. This is a recorded version of that webinar. The slides for this webinar along with the questions that were posted from our audience during the session can be downloaded from the Welcome page that you used to launch this webinar. They can also be found in our community in USDA Connect. I'll provide the URL for this site later in the webinar. OK, let's get started.

Slide 2 Question Number One: What's the difference between a goal and an activity?  
Think of a goal as the end result of what you hope to accomplish by taking training. The goal should not be the training itself. Most of us do not have a goal to take training just to take training. We take training because we have a goal to increase our knowledge, skills or ability, and the training simply supports our goal and helps us to achieve it.  
An example of a well defined goal might be to increase your proficiency in written communication, to acquire additional knowledge about climate change, or to become skilled at illustrating reports with charts and graphs. Then, to achieve that goal, you'll need to perform an activity. That activity is often training. The activity can be an internal activity (meaning the training exists in AgLearn) or an external activity (meaning that the activity is not necessarily training, such as consulting a mentor, or the training is external to AgLearn learning resources). Whether an activity is internal or external, your progress can still be tracked in AgLearn.

Slide 3 Question number two asks if a user can delete old plans. The answer is No. IDPs are considered to be Trusted Source documents. That means the data contained in the document is an official representation of the agreement made between you as an employee and your supervisor. During the current year, your plan can be changed many times, but only by you or your supervisor. Once the plan moves into an Expired status, (at the end of the fiscal or calendar year), the plan cannot be changed by anyone, not even an AgLearn administrator. These expired documents serve as an historical archive of all the goals and activities you made progress on during that plan period, and as an official record, it cannot be deleted. If, however, you created a plan a while ago and it is still in DRAFT status (perhaps it was a practice plan and you won't ever submit it), you can and should delete that plan so that it doesn't appear on reports and cause administrators or managers to send you an email asking you to submit your draft plan.

Slide 4 Users always want to know how to print something, even when it really isn't necessary. While the **Print Plan** button at the top of your IDP will work, the best way to preserve a copy of your plan is to run the **My IDP** report. From your AgLearn Home Page, click the Reports Easy Link, and then scroll down the page to find the My IDP report. Run the report with a PDF format and you'll soon see your IDP activity displayed. From the PDF screen, you can elect to print the report (do you really need to print this?) OR, you can save the PDF file to your PC for future reference. I often hear from users that they have to print their IDP because they need to give it to their supervisor. I remind them that it is very easy to attach a PDF of the My IDP report to an email message. Supervisors can also run this report for their subordinates, so there's really no need to print a copy of your IDP.

Slide 5 Question #4 asks if goals from a previous year's plan can be carried over to a new plan. The answer is Yes. When you first begin the process to create a new plan in AgLearn, either at the beginning of a new fiscal or calendar year, you will be asked if incomplete goals from the previous year's plan should be moved to your new plan. If you respond "Yes", you will be presented with a list of these goals and can select which ones you would like to continue working on in the new year. But what if you don't realize you'd like to copy other plan goals until later in the year? Can you copy goals from other plans at any time during the IDP period? The answer to that is Yes as well, but you'll use the Goal Wizard to do it. Simply create a new goal, select the **Goal Wizard**, then select **Add Goals from Other Plans**. You'll be presented with a list of plans. Choose the plan from which to copy goals, then select the goals that will be moved to the current plan. A job aid titled [Adding an IDP Goal From Another Plan](#) is available to help you with this process.

Slide 6 I often get questions about rejected plans. Question number 5 asks "what is the appropriate response to a rejected plan?". Let's say that for some reason, your supervisor has rejected your plan. What do you do with that plan? Do you revise the rejected plan or do you abandon it and create a brand new plan? The answer is, you modify the existing "rejected" plan.

If you've taken the AgLearn course on IDPs, you'll remember that we describe the back and forth movement of an IDP between a supervisor and an employee as a "tennis ball" approach. By rejecting the plan, the supervisor is simply tossing the IDP "tennis ball" back into your court. Now it's time for you to take action. First, review the notes that your supervisor entered along with the rejection, make the recommended changes and then resubmit the plan to send it back "over the net" into your supervisor's "court". There is no need to create a new plan.

Slide 7 Question six asks about a plan status called “Superseded”. Users are often curious about how a plan gets into a Superseded status. When you create a new plan with dates that overlap your current plan, AgLearn assumes that you no longer want to use the current plan and places it in a superseded status. An example might be a user who creates a fiscal year 2012 plan, has it approved, then later decides to create a calendar year plan. Since the first nine months of 2012 are in both plans, AgLearn assumes that the most recently created plan, the calendar plan, should be the current plan and the other plan, the fiscal year plan, will then move to Superseded status.

Once a plan has been superseded, you can no longer change its status. However, if you have goals and activities on that superseded plan, you can still copy those goals and activities over to your new plan. We spoke about this procedure earlier. The same job aid, [Adding an IDP Goal From Another Plan](#), works here to add goals from your superseded plan to your now current plan. Our next question deals with one of the most common situations where a plan becomes superseded so that a new plan can become the current plan.

Slide 8 Question seven asks “Can I change a Calendar Plan to a Fiscal Year Plan?” This situation came up a lot this year. A user created a new plan, submitted it to the supervisor and got it approved. Then the user realized the plan was for calendar 2012 and their agency policy is to create fiscal year plans, not calendar year plans.

The actions taken to change a calendar year plan to a fiscal year plan depend on the status of the calendar year plan. If the plan is still in Draft status, it has never been submitted to a supervisor and at this stage, you can simply change the plan period of the Draft plan, then submit it for approval. This works only with draft plans.

If the plan is in Submit/Pending status, however, it’s in your supervisor’s “court” and you’ll need to have your supervisor approve that plan, then you create a new fiscal year plan. This will supersede the calendar year plan and you can then copy goals from your superseded calendar plan to your new fiscal plan. If your calendar plan is already in Active/Approved status, simply create your new fiscal year plan and then copy the goals from your superseded calendar plan to the new fiscal year plan. I’ve made a job aid available for you called [Changing A Calendar Year IDP To A Fiscal Year Plan](#) to help you accomplish this task.

Slide 9 Question Eight. This issue was the number one question asked in 2011. Users were convinced their supervisor needed to approve their plan, but their supervisor saw nothing to approve. In each case that I examined, it was the user, not the supervisor, that needed to take action, and that action was a review.

The first thing **you** (not your supervisor) should do is check the status of your IDP. This can be done easily by logging into AgLearn and checking the alerts area of your screen. (The area just to the right of your name). Do you see a message stating **You have a Plan that requires Review and Approval**? If so, that means you'll need to click that link to review and approve your plan. This often happens when a supervisor creates a note or makes a small change to your plan. Once you review and approve your plan, you'll be able to make changes to that plan and submit it to your supervisor for approval. If you login to AgLearn but do not see the "Review and Approve" link in the alerts area, contact your [AgLearn agency Lead administrator](#). If you’re not sure who your AgLearn Lead administrator is, the link on this page will provide a list of contacts, by agency.

Slide 10 Many USDA employees still submit their IDPs on paper. Users often ask if there is a way to document that fact in AgLearn. The answer to that is Yes. There are two reasons why you might not create your IDP in AgLearn: (1) you have created your IDP using a paper form instead of an online form, or (2) you do not have any developmental goals for this year and wish to decline the opportunity to create an IDP.

Be sure to check with your agency before using this method to decline an AgLearn IDP.

If they approve of this method of accounting, the [Declining An AgLearn IDP](#) job aid will show you how to document your decision in AgLearn so that it can be reported as part of agency totals.

Slide 11 And last but certainly not least is question number ten. How can I learn more about the AgLearn IDP? There is a multitude of learning resources about the AgLearn online IDP. The best place to start is with the [AgLearn+ IDP](#) course in AgLearn. This online tutorial simulates the IDP environment so you can walk through the steps for creating and tracking your IDP in AgLearn. I strongly recommend this course for all employees who will be using the AgLearn online IDP.

The next best place to look is in [USDA Connect](#). The URL is listed here. This social network site is available to all USDA employees. In the community called [AgLearn+ adding to your knowledge](#), you'll find activities and blogs that provide additional information about the IDP as well as links to the latest job aids and FAQs. In fact, my latest blog in USDA Connect addresses the top ten most frequently asked questions about the AgLearn IDP.

Finally there is the [IDP Resources in AgLearn](#) page of the Departmental Management's website at [www.idp.usda.gov](http://www.idp.usda.gov).

Slide 12 That concludes our webinar. Please download the slides and the Question and Answers document from the webinar launch page or from our community in USDA Connect. Thanks everyone. I hope today's session has been worthwhile and that you've grown a bit more comfortable with the AgLearn IDP!