## Create an Individual Development Plan for Users Who Already Have an Existing IDP

**Purpose**

The purpose of this job aid is to provide step by step instructions for creating an Individual Development Plan (IDP) in the LMS if you have previously created a plan. The procedure consists of several tasks that are listed below.

Task
**Review Current To-Do-List**

Task
**Check Previous Plan(s)**

Task
**Update Talent Profile and Supervisor**

Task
**Initiate a New IDP**

Task
**Use Goal Wizard to Add a Goal from Previous IDP**

Task
**Add a New Goal**

Task
**Add Activities to Goals**

Task
**Submit the IDP for Approval**

## Review Current To-Do-List

**1** From the **Home** page, scroll down to your **To-Do-List**.

**2** Check courses. If they are valid requirements, they must stay on your to-do-list.

**Note:** Check with your supervisor before performing next function.

**3** If the course is no longer valid, remove the course from your to-do-list with supervisor concurrence. Move cursor over the course and click the **Remove** button.



To-Do List
Show: Everything

Overdue
58 days overdue — ENHANCED DEFENSE FINANCIAL MANAGEMENT TRAINING
Must be registered
28 days overdue — DLA LMS v6.1 Workshop – Admins
Must be registered
13 days overdue — DLA RECORDS MANAGEMENT TRAINING - test
Available

Due within a week
1/31/2011 — 7 HABITS OF HIGHLY EFFECTIVE PEOPLE
Must be registered

Due within a month
2/13/2011 — Finance Core Process 1.0 (web course)
In progress

Due later
9/30/2011 — DLA SUPPLY MANAGEMENT
Must be registered
9/30/2012 — Employee Development (HRCI/PHR)
Requires Approval
— Human Resource Development (HRCI/PHR)
Requires Approval
— Leading the Workforce Generations Simulation
Available

No due date
— EFFECTIVE BRIEFINGS IN DLA
Must be registered

**7 HABITS OF HIGHLY EFFECTIVE PEOPLE**
Self-Assigned

Originated From **Approved Plan**
**COURSE BUS-SIGNATURE**

Provides participants with a robust and tactical implementation plan to fully integrate The 7 Habits into their lives. Designed for anyone looking to become a m ... **more**

You are **NOT REGISTERED**

There are **NO SCHEDULED SESSIONS** for this course.
**Request Schedule** for this item.

Instructor-Led Item
Must be registered

**4 days remaining**

Request Schedule
Remove
View Details
Remove

**Note:** If a course is still a requirement for this FY, you have to add it to your new IDP plan for this FY. Write down the course to add to your new plan.

## Check Previous Plan(s)

**1** From the **Home** page, click on **Plans** under the Easy Links.

Your previous plans will be listed on your **My Plans** page.

**Note:** You cannot create a New IDP with a previous plan in Submit/Pending status.

If you have a plan in **Submit/Pending** status, check with your supervisor to get your previous plan approved or rejected **before** creating a New IDP. See **Note** at the bottom of the illustration

*If the supervisor you submitted your previous IDP to retired, send a ticket to the LMS help desk, listing the retired supervisor's name.

**Definitions of Plan Statuses:**

**\*Active/Approved:** Plan is active and has been approved.

**\*Superseded:** Plan has been superseded by a new plan.

**Draft:** Plan has not been submitted. You can delete a plan in Draft Status if no longer needed.

**Submit/Pending:** Plan is waiting on approval.

**Rejected:** Plan has been rejected by supervisor.

**Expired:** Effective Date and Expiration Date has expired for plan.

*Plans that can be utilized for the Goal Wizard.



| Plan Title | Plan Period | Plan Status ▲ | Effective Date | Expiration Date |
|---|---|---|---|---|
| Test IDP 12 | DORRA IDP OPEN SEASON - FY11 | Active/Approved | 2/2/2010 0000 America/New York | 9/30/2011 0000 America/New York |
| Test IDP 2 | DORRA IDP OPEN SEASON - FY11 | Draft | 2/2/2010 0000 America/New York | 9/30/2011 0000 America/New York |
| TEST IDP | DSCP OPEN SEASON - FY11 | Superseded | 2/1/2010 0000 America/New York | 9/30/2011 0000 America/New York |
| Annual Individual Development Plan | | Expired | 2/2/2009 0000 America/New York | 9/30/2009 0000 America/New York |
| Annual Individual Development Plan | | Rejected View Notes | 9/29/2006 1546 America/New York | 10/30/2007 0000 America/New York |
| Career Advancement | DORRA IDP OPEN SEASON - FY11 | Submit/Pending | 2/2/2010 0000 America/New York | 9/30/2011 0000 America/New York |

**Note:** Your previous IDP was submitted to the supervisor you had listed in your talent profile for that FY. You can NOT change to your current supervisor with a pending IDP. The old supervisor MUST approve/reject the old IDP prior to creating a new IDP.

**\*You cannot create a new IDP with a previous IDP in pending status.**

# Update Talent Profile and Supervisor

| | | |
|---|---|---|
| **①** | From the **Home** page, click on your name. | |
| | <u>or</u> | |
| **②** | Click the **Your Talent Profile is incomplete** link in the Alerts section of your **Home** page. | |
| | **Note:** This is the area where you update your DLA email address. | |

Welcome **Your Name** | Search Catalog | Check System |

**DLA LMS**    Home    Catalog

**①** **Your Name**
Your Occupation
Your Organization

**②** Your Talent Profile is Incomplete

To-Do List        Show: Everything
Due within a month
8/5/2009   Emergency Planning
Must be registered

Easy Links
Approvals          Plans
Completed Work     Reports
News              Tuition Assistance/Unique Training R
Order Status       System Settings

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Your **Profile** screen displays. Scroll down to see the Employee Information box.

**Note:** If your current supervisor is updated, skip to the next page for task: **Initiate a New IDP**

**③** Click on the **Edit** icon ( ) An orange outline displays around the section.

**④** Click within the Employee Information Box to Edit.

An Edit dialog box displays.

**⑤** Click the magnifier and a **Search Supervisor** screen will appear.

**⑥** Complete the **Last Name** field. If the last name is common, complete the **First Name** field.

**Note:** Pay attention to spelling and keep search criteria as simple as possible.

**⑦** Click **Search.**

To update your Supervisor, please click on the edit (pencil) icon in the Employee information section. Then, click inside that section to pop open the edit window.
**③** 
— **Employee Information** —

User ID:
Employee Type:                DoD Civilian Employee
Employee Status:              Non-exempt  **④**
Supervisor:
Number of Direct Reports:

**Edit Employee Information**

\* Required Field(s)

Supervisor        **⑤**

Save    Cancel

**Supervisor**                                        Help
**Search Supervisor**
Enter a value for each field that you want to use to filter your search. Click Search to display the results.

Case sensitive search:    ○ Yes  ● No
**⑥**  Last Name:    Starts With  ▼
First Name:   Starts With  ▼
Middle Initial:  Starts With  ▼

**⑦** Search   Reset

| 8 | Click **Select** beside the correct name of your Supervisor.<br><br>__Note:__  If more than one person with the same name shows up, pay attention to the location and/or middle initial to select your correct supervisor. | **Supervisor**                                           Help<br>← Refine Search<br><br>**View Supervisor Results**<br><br>| User ID | User Name | Job Location | |<br>| 12372584 | SMITH, JOHN L. | 512060760 (Richmond, VA) | 8 Select |<br>| 12372583 | SMITH, JOHN C | 426540101 (Philadelphia, PA) | Select |<br>| 12364689 | Smith, John I | 421943133 (Defense Logistics Agency-New Cumberland) | Select |<br>| 12361147 | Smith, John D | 404780143 (Tulsa, Tulsa, OK) | Select |<br>| 12390483 | Smith, John Everett | 425010041 (Mechanicsburg, PA) | Select |<br>| 12347295 | Smith, John M | 425010041 (Mechanicsburg, PA) | Select |<br>| 12355802 | Smith, John S | BA3000000 (Manama, Bahrain) | Select |<br>| 12352200 | Smith, Johnna L | 063880077 (Tracy, San Joaquin, CA) | Select |<br><br>Records per Page 25 ▼ (8 total records) |
| 9 | Click **Save**. | **Edit Employee Information**    ☒<br><br>* Required Field(s)<br><br>Supervisor    🔍 [              ]<br><br>9 [ Save ] [ Cancel ] |

| | Initiate a new IDP | |
|---|---|---|
| **1** | From the **Home** page, click on **Plans** located in the Easy Links box. |  |
| **2** | Click **Create New Plan** to create a new IDP. |  |
| **3** **4** | Type in the **Plan Title**. Click **Select** beside the Plan Period field. |  |
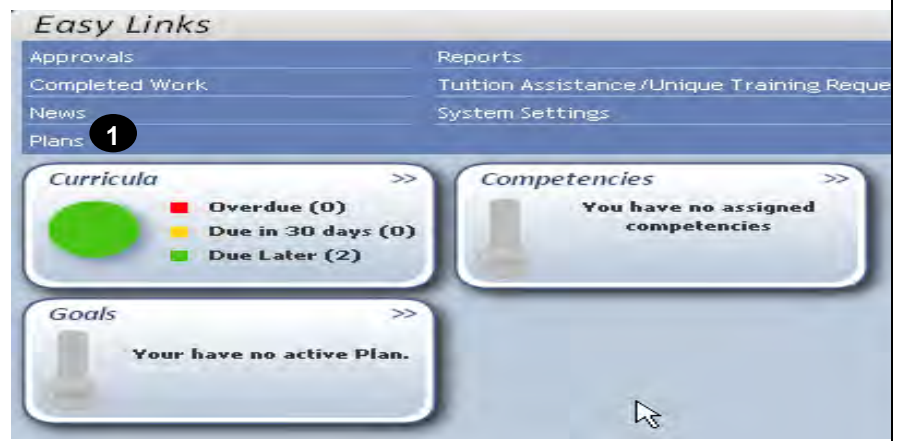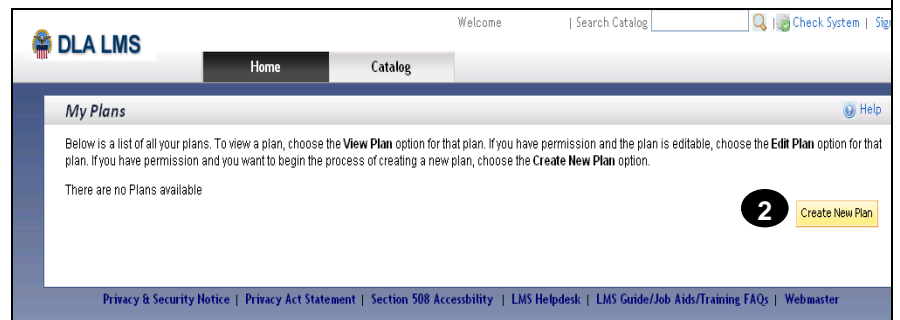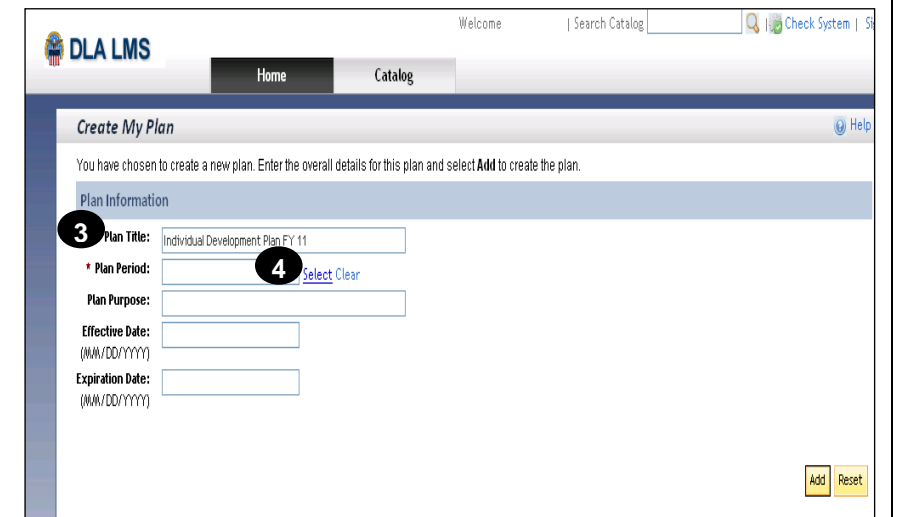
# Initiate a new IDP, Continued

| | | |
|---|---|---|
| **5** | A **Date Periods** screen will pop up.<br><br>Select the **Date Period ID** and **Description** that applies to your organization. Your selection will populate the **Effective Date** and **Expiration Date** fields. |  |
| **6** | Click **Add** [Add] in the bottom right hand corner under **Copy Goals and Activities from Active Plan.** | |
| **7** | After you click [Add], a screen like the one on the right will appear.<br><br>*See the next page for **Goal Wizard** Instructions.  If you do not want to use goals from another plan, go to **Add A New Goal**. |  |

## Use Goal Wizard to Add a Goal from Previous IDP

**1** On the **My Plans and Goals** screen, Click on **New Goal**.



**2** At the **Add Goal to Plan** screen, click the **Goal Wizard** button.

**Note:** Use this function screen only when you want to add a goal that was included in your previous IDP.
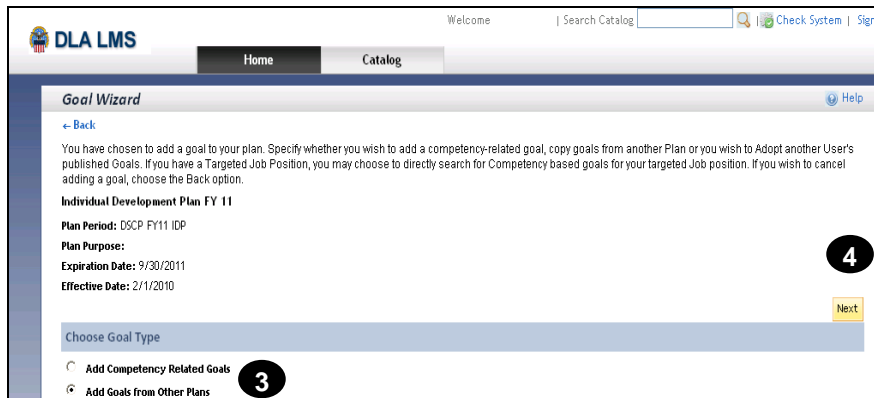
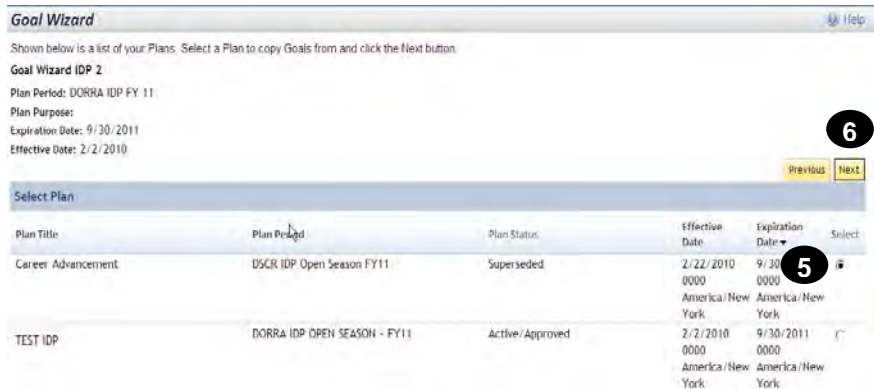**3** Click the **Add Goals from Other Plans** under **Choose Goal Type**.

**4** Click the **Next** button.

**5** Click the radio button beside the plan for the goal you want to carry forward in the **Select** column.
**Note:** You can only choose one at a time and you can only choose from an Active/Approved or Superseded Plan.

**6** Click the **Next** button.

| | |
|---|---|
| **7** Select the Goals you would like to add to your new IDP by putting a check in the **Select** box.<br><br>**8** After you select your goals, click on the **Next** button. | **Goal Wizard** ⓘ Help<br>Shown below is a list of Goals. Review the Goal information. Select appropriate Goals by clicking the checkbox for that Goal. Click Next when you are done.<br>**Goal Wizard IDP 2**<br>**Plan Period:** DORRA IDP FY 11<br>**Plan Purpose:**<br>**Expiration Date:** 9/30/2011<br>**Effective Date:** 2/2/2010    **8**   Previous Next<br>**Select Goals**<br>Select All / Deselect All<br><br>Goal Name   Goal Description   TargetDate   Priority   Target Rating   Stretch Rating   Related Competency   Select<br>Enroll In PhD courses   9/30/2011<br>Extensive LMS Training   9/30/2011   **7**<br>Workforce Development   9/30/2012<br>Select All / Deselect All |
| You must complete the **\*Required Fields:**<br><br>**\*9** Select the \***Target Date** by typing the date in or utilizing the calendar.<br><br>**\*10** Click on the dropdown under **\*Plan Section ID** and choose to add this goal to your **List of Long Term Goals or Short Term Goals**.<br>**Short Term**: A goal that must be met within the timeframe of the IDP period<br>**Long Term**: A goal that is needed, but can be met beyond the IDP time period<br><br>**11** Click in the **Copy Activities** box, if you want to copy activities from this goal.<br><br>**12** Click in the **Select to Add** box to Add this Goal.<br><br>**13** Click on the [Save and Add Another] **Save and Add Another** button to add more goals from other plans or the **Finished** [Finished] button. | **Goal Wizard** ⓘ Help<br>The list below includes all Goals that will be created on your Plan. For each goal, specify the additional goal properties you would like to set, including the target level you would like to achieve for this goal and an optional stretch target. To confirm creating a goal, ensure that it is selected for addition. When you are finished, choose the Finished option. To add the selected goals and start the process over again, choose the Save and Add Another option.<br><br>**Goal Wizard IDP 2**<br>**Plan Period:** DORRA IDP FY 11<br>**Plan Purpose:**<br>**Expiration Date:** 9/30/2011<br>**Effective Date:** 2/2/2010    **13**<br>**\* = Required Fields**    Previous Finished Save and Add Another Cancel<br>**Goal Details**<br>Select All / Deselect All<br><br>**\* Goal Name**   **\*9** \*TargetDate (MM/DD/YYYY)   Priority   **\*10** \* Plan Section ID   Target Rating (1000,001)   Stretch Rating (1000,001)   Related Competency   **11** Copy Activities   **12** Select to Add<br><br>[ ]   [ ] 📅   List of Long Term Goals ▼   [ ]   [ ]   □   ☑<br>[ ]   [ ] 📅   List of Short-Term Goals ▼   3   5   □   ☑<br>[ ]   [ ] 📅   List of Short-Term Goals ▼   [ ]   [ ]   □   ☑<br>Select All / Deselect All<br><br>**Note:** The next page will have instructions on how to add New Goals (goals not from previous plans) to your new IDP. |

## Add a New Goal

| | | |
|---|---|---|
| **1** | Click the New Goal button. |  |
| **\*2** | **\*You must complete all Required Fields (\*).**

\*Type the **Goal Name** in the field. See Note at the bottom of the illustration. |  |
| **3** | Type your **Goal Description** in this field. (optional) | |
| **4** | Select whether you want to add this goal to your list of short term or long term goals **Section** of your IDP. (recommended)

**Short Term**—A goal that must be met within the timeframe of the IDP period (typically the goal and activities associated with these goals are priorities one and two—Mission Essential and Enhancement).
**Long Term**—A goal that is needed, but can be met beyond the IDP time period (typically the goal and the activities associated with these goals are priority 3—Optional). | **\*2** Note: A **Goal** is the purpose of the training, the end result desired. In the example above, the **Goal Name** is "Improve project management skills". A Goal is NOT a specific course. When you add **Activities** to your goal a course or courses may be among the activities you add to help you achieve the goal.

**\*Every IDP MUST have at least one goal if you did not use the Goal Wizard to pull in previous goals.** |
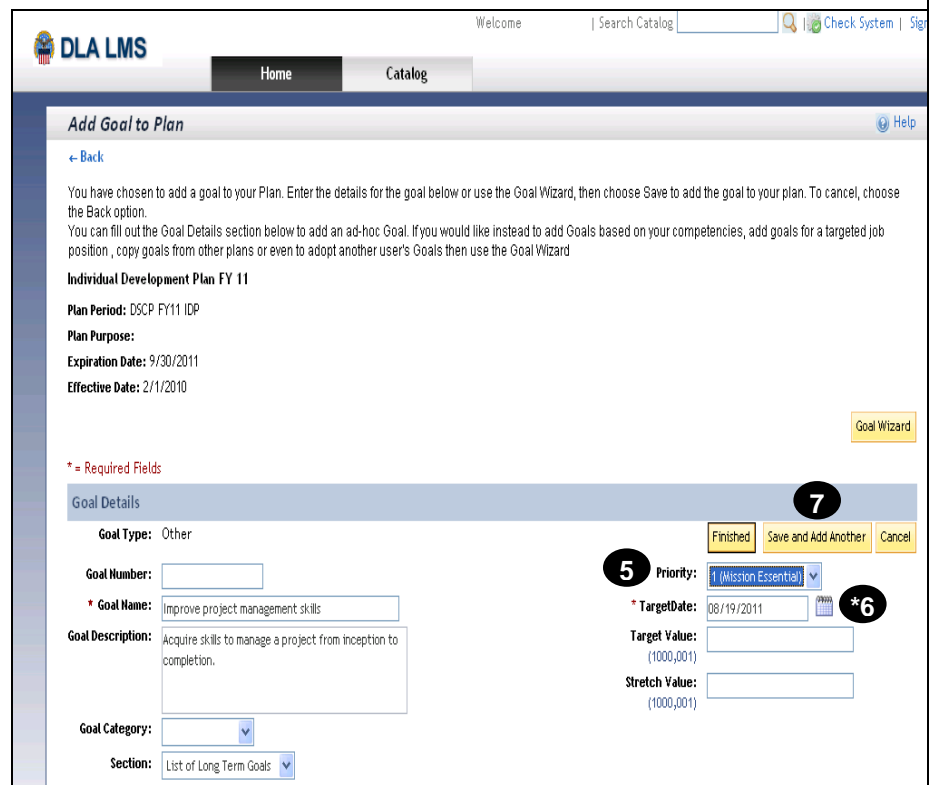
## Add a New Goal, Continued

**\*You must complete all Required Fields (\*).**

**❺** Select the appropriate **Priority** for this goal. (optional)

**\*6** \*Select a **Target Date** for meeting the goal from the calendar 📅 . Select the month first, and then the specific day to get the information to populate the field.

**❼** To add more goals: click **Save and Add Another**.

To continue forward with no more goals: click **Finished**

## Add Activities to Goals

| | |
|---|---|
| **1** Click the small blue arrow ▶ beside the **Goal Name** to reveal the **Add Activity** button. <br><br> **2** Click the **Add Activity** button. <br><br> **3** Click **Search for Activity** if you want to search the catalog for trainings and/or Tuition Assistance. <br><br> *For Tuition Assistance, you must choose **Undergraduate** or **Graduate** courses. <br><br> *ONLY click on **Unique Training** for unique trainings outside of tuition assistance and the catalog. |  <br><br> **Note:** When using **Unique Training**, type in the Activity Name of the conference or training NOT found in the catalog that you would like to attend. If it is in the catalog, choose **Search for Activity**. |
| **4** Type in **Keywords** to search the catalog. (less is more) <br><br> **5** Click **Search** <br><br> **6** Review the **Item Search Results** to find appropriate activities/courses. <br><br> **7** Click the course name under **Title** to see the description. See Note at the bottom of the illustration to the right. <br><br> **8** Click the box in the **Select** column to select the course. <br><br> **9** Click **Add**. |  <br><br> **Note:** For Step 7: <u>**Do not click**</u> the **Request Schedule** or **Add to To-Do List buttons** on the description page. Doing so will bypass the IDP process and add the item directly to your To-Do List. <br><br> ***If your goal is to maintain your current position and you require no training, do not select any activities.** |

| | |
|---|---|
| **10** | Click the **Edit** button to add a priority to your activity. |
| **11** | Click on the drop down next to **Priority**.<br><br>**Note:** If this step is not completed, your activities will default to 3 if not updated.<br><br>Choose the **Priority** for your Activity:<br><br>**1. Mission Essential**—Training required during the forthcoming annual training cycle considered essential to mission accomplishment.<br>**2. Enhancement**—Training, the omission of which might impact adversely on complete and qualitative mission accomplishment.<br><br>**3. Optional**—Training of a broadening nature that might be helpful in enhancing the overall performance levels of employees already considered being competent. |
| **12** | Click **Apply Changes** when finished. |

Section Name: None(1)

| Goal Name ▲ | TargetDate | Priority | Percent Toward Target | Ac |
|---|---|---|---|---|
| goal | 1/31/2011 | | | View/A |
| | | | | Move |
| | | | | E |

▶ Details
▼ Activities (1)                                    Add A

| Name ▲ | Due Date | Type | Priority | Target / Stretch | Action |
|---|---|---|---|---|---|
| 7 HABITS OF HIGHLY EFFECTIVE PEOPLE | 1/31/2011 | Item | | | View/Add Notes |
| | | | | | **10** Edit |
| | | | | | View Item Details |

Section Name: None(1)

| Goal Name ▲ | TargetDate | Priority | Percent Toward Target | Acti |
|---|---|---|---|---|
| goal | 1/31/2011 | | | View/Ad |
| | | | | Move |
| | | | | Ed |

▶ Details
▼ Activities (1)                                    Add Ac

| Name ▲ | Due Date | Type | Priority | Target / Stretch | Action |
|---|---|---|---|---|---|
| 7 HABITS OF HIGHLY EFFECTIVE PEOPLE | 1/31/2011 | Item | | | View/Add Notes |
| | | | | | View Item Details |

*   Activity Name:    7 HABITS OF HIGHLY EFFECTIVE PEOPLE          Priority:  ▼
    Related Item:     7 HABITS OF HIGHLY EFFECTIVE PEOPLE       **11**
*   TargetDate:       1/31/2011                                    1 (Mission Essential)
    (MM/DD/YYYY)                                                   2 (Enhancement)
                                                                   3 (Optional)
                                                                              Apply Changes
                                                                   **12**

**\*Follow Steps 1-12 to add more activities to goals when needed.**

## Submit IDP for Supervisory Approval

**1** Once you have finished adding Goals and Activities, on the **My Plans and Goals** page click the **Save** button.

**2** Click the **Print Plan** button to print and discuss with your supervisor.

**3** Discuss plan with your supervisor and come to an agreement on goals and activities. (This is done outside of LMS).

**4** Re-enter LMS and go back to your plan. Click the **Submit for Approval** button.

The system will notify your supervisor that the IDP needs to be approved. Your screen will show "**Currently this plan is pending approval. You can continue to make changes, however you cannot submit for approval until the submitted version is approved or rejected.**"



**Note:** Prior to submitting your IDP, printing your plan to discuss with your supervisor eliminates sending your IDP back and forth within LMS.

**Note to Supervisors**: Click this link to learn how to Approve or Disapprove.