

**Notes**

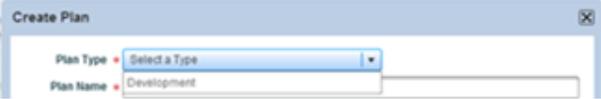
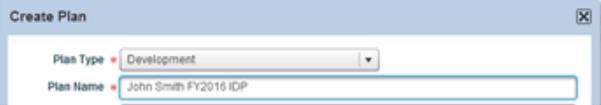
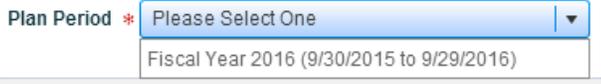
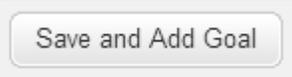
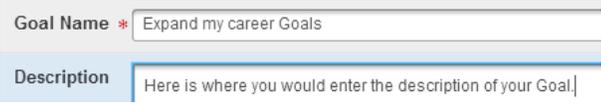
Be sure to check the date in the upper right hand corner to make sure you are using the latest version of this job aid.

You can also enter a description for your plan, although this is not required.

At this point, your plan is in Draft status, meaning that it has not yet been submitted to your Supervisor.

## Creating an IDP in AgLearn

This job aid will take you through the steps for creating a new IDP, adding a goal, adding an activity and submitting your plan for approval

Step	Activity	View
1.	From your AgLearn Home Page, select the <b>IDP Goals</b> status pod. <b>Note:</b> The <b>My Goals Workspace</b> will appear.	
2.	In the upper right hand corner of the My Goals Workspace select <b>Create Plan</b> .	
3.	From the Plan Type dropdown list select <b>Development</b> .	
4.	Enter a <b>Plan Name</b> for your IDP.	
5.	Select a <b>Plan Period</b> .	
6.	Select <b>Save and Add Goal</b> .	
7.	Enter a <b>Goal Name</b> . <b>Note:</b> You may also wish to enter an optional goal description.	
8.	Select the calendar icon to enter a <b>Target Date</b> for your goal.	

Notes

## Creating an IDP in AgLearn

9. Select a **Category** for your goal.

Category \*

- Agency
- Career Development Goals
- Current Position Goals

10. Select a **Section** for your Goal. This is a way to express the time frame you intend to complete your goal.

Section \*

- LONG TERM GOAL
- MID TERM GOAL
- SHORT TERM GOAL

11. Select **Save and Close** to save your goal and close your plan.

Save and Close

**Short Term** goals are projected to take 90 days or less for completion.

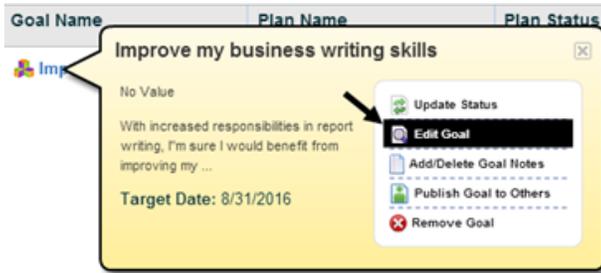
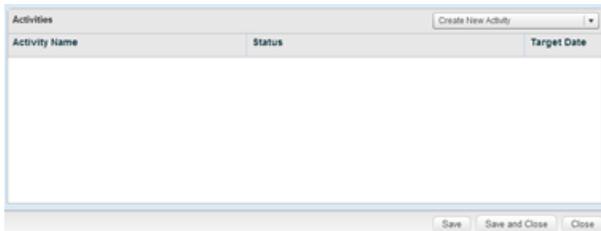
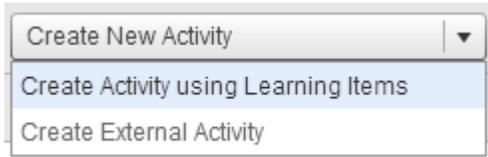
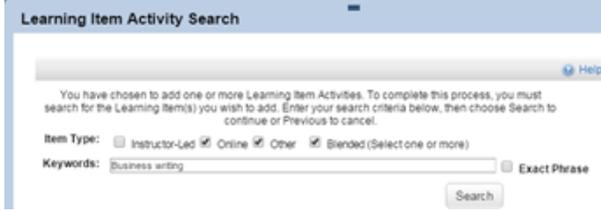
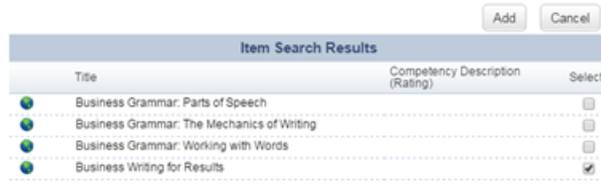
**Mid Term** goals are projected to take longer than 90 days but less than one year for completion.

**Long Term** goals are projected to take longer than one year for completion.

## Adding a New Activity Using AgLearn Items

Activities can be attached to goals by you or your supervisor to identify what things you might do to help you reach your goals. For example, if my goal is to become more proficient in Excel charts, I might add an activity that would involve taking an AgLearn course (known as an AgLearn Item) that covers advanced topics like Excel charts. The following task will show you how to create a goal activity by searching and using Items in AgLearn

If you are continuing from the previous task, you can skip this step

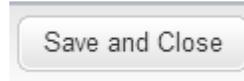
Step	Activity	View
1.	From the My Goals Workspace screen, hover over your goal name and select <b>Edit Goal</b> .	
2.	Scroll down to the <b>Activities</b> section of your goal.	
3.	From the Create New Activity drop down list, select <b>Create Activity using Learning Items</b> .	
4.	Enter a phrase to search for AgLearn courses related to your goal and click <b>Search</b> .	
5.	From the list of available courses, select one or more courses to add as goal activities.	
6.	Select <b>Add</b> .	

## Adding a New Activity Using AgLearn Items

7. Review the Activities area to confirm your AgLearn items are now listed as goal activities.



8. Select **Save and Close**.

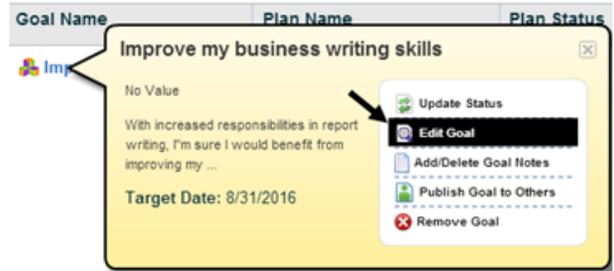


## Create External Activity

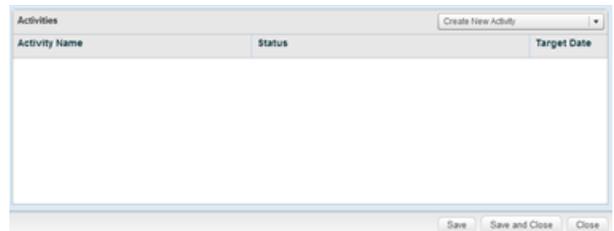
Achieving your developmental goals may require activities that are not training related. Activities that don't involve AgLearn resources are called external activities.

### Step Activity View

1. From the My Goals Workspace screen, hover over your goal name and select **Edit Goal**.



2. Scroll down to the Activities section of your goal.



3. From the Create New Activity drop down list, select **Create External Activity**.



4. Enter a name for your activity.



## Adding an External Activity

Be sure the target date for you activity is before the goal's target date.

5. Enter a target date for your activity's completion.
 

Target Date \*
6. Select **Save** to save the external activity.
7. Select **Save and Close** to save and exit the goal.

**Tip:** Additional fields in the external activity form, such as Activity Priority and Target, Stretch and Actual fields are not required, but can be used to provide additional information. You may wish to identify your activity with a high, medium or low priority. Target and Stretch goals are associated with numeric goals, such as the example above to “submit at least 3 written reports for feedback”. The Target activity in this case would be 3 (for 3 reports). A Stretch activity might be 4 (to submit 4 reports). The Actual field will be updated as the user makes progress on the activity. Target and Stretch fields are also used with assessed competencies, when added to your plan as goals because of identified competency gaps. The Target field will be populated with the required proficiency level for your job position. You can enter a level higher than the required level if you plan to increase your proficiency level beyond the required level.

## Submitting You Plan for Approval

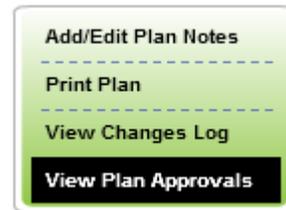
Once you have added at least one goal to your IDP, you will be able to submit your plan for approval by your supervisor. This will move your plan from Draft status to Pending Approval status. Once submitted, you'll be able to check on who's responsible for the next action by selecting **View Plan Approvals**

- | Step      | Activity   | View   |
|-----------|--|--|
| <b>1.</b> | Click <b>Submit for Approval</b> .   | <div style="border: 1px solid #ccc; padding: 5px;"> <p><b>View Plan:</b> <span style="border: 1px solid #ccc; padding: 2px;">John Smith FY2016 IDP (Draft)   ▾</span></p> <p style="text-align: right;"> <input type="button" value="Submit for Approval"/> <span style="color: red; font-weight: bold; margin-left: 10px;">⚠ Changes to the Plan require approval</span> </p> </div>  |
| <b>2.</b> | Select <b>Yes</b> to confirm your understanding that changes can no longer be made until the plan is approved or rejected. | <div style="border: 1px solid #ccc; padding: 10px; background-color: #e0e0e0;"> <p style="text-align: center; font-weight: bold; color: #4CAF50;">Submit for Approval</p> <div style="text-align: center; padding: 10px;"> <p style="margin: 0;">Once the plan is submitted for approval, you cannot make any changes till the plan is approved or rejected. Do you wish to continue?</p> <p style="margin: 0;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </p> </div> </div> |
| <b>3.</b> | Note that the current status of the plan is <b>Pending Approval</b> .  | <div style="border: 1px solid #ccc; padding: 5px;"> <p><b>View Plan:</b> <span style="border: 1px solid #ccc; padding: 2px;">My 2016 IDP (Pending Approval)   ▾</span></p> <p style="text-align: center;"> <input type="button" value="Recall Plan"/> </p> <p style="margin-top: 10px;"><b>Status:</b> Pending Approval</p> </div>   |

There is an exception to this rule. See the task titled **Recalling an IDP Plan**.

## Submitting Your Plan for Approval

4. Select **View Plan Approvals** to view the name of the person who must take the next action.



There is no Action Date associated with the Supervisor, indicating he or she is the person who must take the next action.

5. Note that your name is at the top of the list, along with the date on which you submitted your plan.

Step ...	Action	Name	Action Date
0	Submitted	JENFER C ENDECOTT	11/11/2015
1		CHRISTOPHER J LOWE	

The actual email may look different depending on your Outlook settings and version.

6. Your supervisor will shortly receive an email from AgLearn System instructing them to login to AgLearn and review and approve your plan.

From: AgLearn.System@ocio.usda.gov  
 Sent: Thursday, November 12, 2015 8:05 AM  
 To: [redacted]  
 Subject: Plan Review

A user ([redacted]) has submitted a new plan (My 2016 IDP) effective (9/30/2015 02:00 AM America/New York). This plan requires your review and approval. Please log in to AgLearn and review this plan as soon as possible. Contact your AgLearn Agency Lead (<http://www.aglearn.usda.gov/LandingPage/popups/contact.html>) if you have any questions.

Keep in mind that significant changes require approval by the other party.

7. After your supervisor approves your plan, you will receive an email from AgLearn System. At this point you can continue to add goals and activities, or update the status of your goals as you make progress.

From: AgLearn.[redacted].System@ocio.usda.gov  
 To: [redacted]  
 Cc: [redacted]  
 Subject: Plan Approved

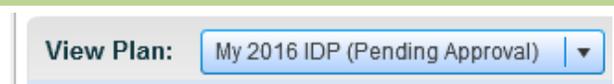
This email is to inform you that your Plan, My 2016 IDP, was reviewed and approved by [redacted] on 11/12/2015 08:07 AM America/Denver. Your plan is now Active.

## Recalling a Plan

Normally, once a plan is submitted for approval, no additional changes can be made until it has been approved by your supervisor. If, however, you submit a plan for approval, and then realize you still have changes that you would like to make, you can recall the plan before your supervisor approves it.

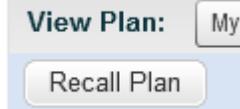
Step	Activity	View
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1. From the My Goals Workspace, select the plan you would like to recall.  
**Note:** Only plans that appear with the phrase (**Pending Approval**) are eligible for recall.



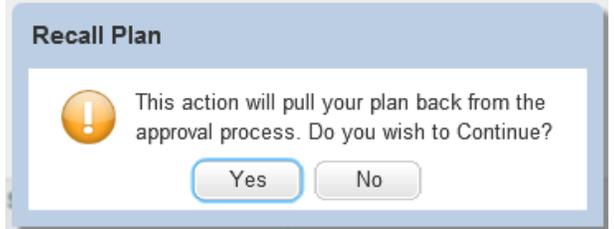
## Recalling a Plan

2. Select **Recall Plan**.



Once you select Yes, your plan will change back to Draft status and the Recall button will change to a Submit for approval button.

3. Select **Yes** to confirm you understand and wish to continue the process.

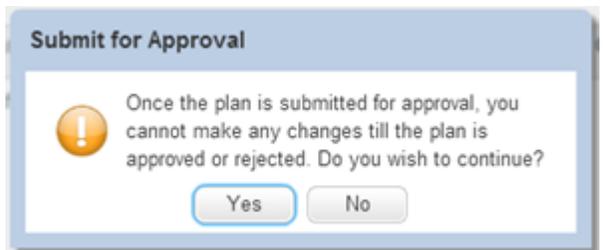


4. Make any goal or activity changes you wish to make, and then select **Submit for Approval**.



At this point the Recall button appears, because the plan is now pending approval. If you find you need to make additional changes before your supervisor approves the plan, you must first recall the plan.

5. Select Yes to confirm. At this point, make no additional changes until your Supervisor approves or rejects your plan.



## Updating the Status of an Activity or Goal

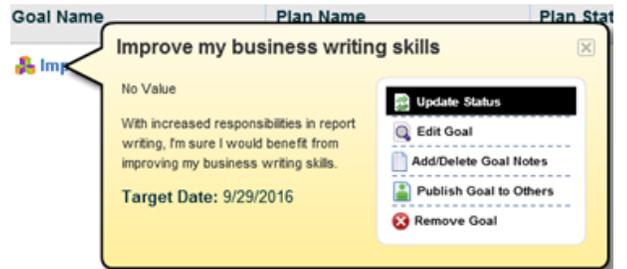
The status of internal activities (those created using AgLearn items) will be automatically updated as you complete them. External activities will need to be updated by you as will the associated goals. The following steps show you how to update an external activity and then how to update the status of a goal once all associated activities have been completed.

Step	Activity	View
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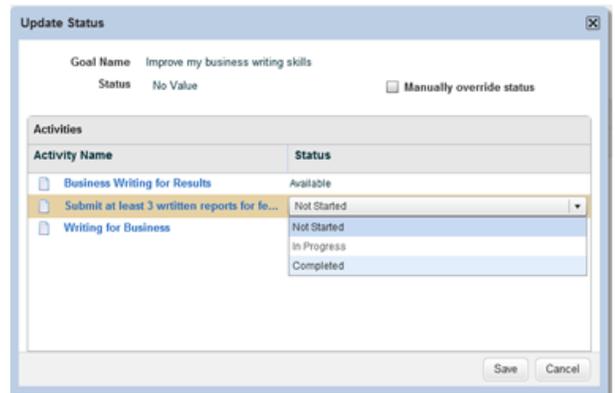
- From the My Goals Workspace, select the plan you would like to update.  
**Note:** The plan must be in Approved status. Plans that are in Pending Approval status cannot be edited unless recalled.



- Hover your mouse over the goal you wish to update and select **Update Status**.



- In the Update Status window, select the activity's new status from the corresponding drop down list.



- Select **Save**.



## Updating the Status of an Activity or Goal

5. When all goal activities have been completed, you can now update the status of the goal to Completed. In the Update Status window, select **Manually override status**.

Activity Name	Status
Business Writing for Results	Available
Submit at least 3 written reports for fe...	Completed
Writing for Business	Completed

6. From the Status drop down list, select **Complete**.

7. Select **Save**.

8. In the My Goals Workspace, your goal status now shows **Complete**.

Goal Name	Plan Name	Plan Status	Target Date	Goal Status
Improve my business wr...	My 2015 DP	Approved	5/29/2015	Complete