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User Job Aid: Create, Edit, and Save eIDP

Purpose

The purpose of this Job Aid is to guide you through the steps to create your eIDP with and without competencies, submit your eIDP to your Supervisor for approval, update your eIDP as you work on your goals, and print your eIDP.

This Job Aid is organized according to the major tasks for creating your eIDP.

Without Competencies:

Task 1 consists of several subtasks to create your eIDP. Each subtask provides step-by-step instructions for:

- Establishing your overall eIDP,
- Adding goals,
- Assigning learning activities to these goals, and
- Submitting your eIDP for approval.

Task 2 addresses the step-by-step procedures for generating a printout of your eIDP as well as other useful reports based on your progress with your goals and learning activities.

Task 3 provides instructions on how to use a previous eIDP to create a new eIDP.

With Competencies:

Task 1 consists of several subtasks to create your eIDP. Each subtask provides step-by-step instructions for:

- Establishing your overall eIDP,
- Adding competency-based goals,
- Assigning learning activities to these goals, and
- Submitting your eIDP for approval.

Task 2 addresses the step-by-step procedures for generating a printout of your eIDP as well as other useful reports based on your progress with your goals and learning activities.

Task 3 provides instructions on how to use a previous eIDP to create a new eIDP.
Create an eIDP without Competencies

Creating Your eIDP

Access the TMS Home Page

Access the IE browser and enter this URL: https://www.tms.va.gov/SecureAuth35/ and log in to the TMS 2.0. The TMS Home page displays.

Figure 1: TMS Home Page
Access eIDP in the Home Menu

On the TMS Home page, select the **Home** dropdown menu. Select **IDP/Competency Assessments**.

![Home menu with IDP/Competency Assessments highlighted](image)

**Figure 2: Home menu with IDP/Competency Assessments highlighted**
The **IDP/Competency Assessments Forms** page displays.

**Figure 3: My Forms page**

Information about any existing forms displays. As shown in Figure 3, you can create and view in progress and completed forms.

**Create eIDP**

On the My Forms page, select the **Create New Form** button.

**Figure 4: My Forms page with Create New Form button highlighted**
Select the hyperlinked name of the appropriate form. If you are reviewing an existing eIDP that was sent back from your supervisor for revision, it will display here (In Progress > Inbox).

![Figure 5: Form type selection](image)

If completing the form on your behalf, select your hyperlinked name.

![Figure 6: Subject of IDP link](image)
Select the appropriate review period and due date. Then, select the **Create and Open** button.

![Figure 7: Review period options](image)

Figure 7: Review period options

Figure 8 shows an example of a development plan. Select the **Development Plan** tab to scroll down to the Development Plan section where you can add and revise goals.

![Figure 8: Example of an incomplete development plan](image)

Figure 8: Example of an incomplete development plan
Add a Goal
Once the Competency Assessment is completed, select Add Goal under the Development Plan section.

Figure 9: Development Plan section
The Add Development Goal window displays.

Figure 10: Add Development Goal pop-up window
You must enter a Goal Name. You can optionally enter Category, Expected Outcome, Estimated and Actual Cost, and Goal Start and Due Date.
Next, select the **Status**, which is a required field. Once the goal is completed, you can enter the **Date Completed**. Then, select the **Save & Close** button.

![Figure 11: Add Development Goal pop-up window](image)

The development goal displays. Select the **Add New Learning Activity** link to associate a learning activity with the goal. You can add multiple.

![Figure 13: Add New Learning Activity to Development Plan](image)

The Search pop-up window displays. Use the Search field to locate the desired learning activity.
Once the learning activity is located, select **Add to Learning Plan** and then select **Done**. You are returned to the Development Plan.

The selected learning activity displays under the specified goal.
Submit Your eIDP for Approval

After your goals are added, scroll down to the Comments section where you can add comments to send along to your supervisor with your completed Development Plan. Once reviewed, if your supervisor returns your eIDP with comments, those comments will display under the Supervisor Comments section. Then, select the **Send to Supervisor for Approval** button.

A summary page displays, indicating the supervisor to whom the Development Plan will be sent for approval. To confirm, select the **Send to Supervisor for Approval** button.
You are turned to your My Forms page. Select the En Route tab to check on the status of your Development Plan.

Any forms sent for approval display. Here, you can see the Development Plan is with the supervisor for approval. Once it has been approved, it will display in your My Forms Inbox.
Any associated learning activities for approved Development Plans will display in your My Learning.

Editing Your eIDP

As you work on fulfilling the goals and activities of your eIDP, you will want to reflect your progress in your eIDP. These edit capabilities may be grouped into three overall categories of modifications.

- Category 1 – Edits that impact the display of information on the My Forms page
- Category 2 – Edits to the goals of your eIDP
- Category 3 – Edits to the specific activities associated with the goals of your eIDP

In the remainder of the task, step-by-step instructions are provided for each of the edit capabilities. It is important to note that these edits may occur in any sequence. Importantly, multiple ways to edit information within your eIDP are available. Those included in the remainder of Task 2 represent one way of performing these edits. Finally, depending on the nature of the edit, your eIDP may need to be re-submitted to your Supervisor for approval.
Category 1 – Modifying the Display of My Forms Page

You can change what information displays on the My Forms page. Under Display Options, use the checkboxes to select what information is visible.

<table>
<thead>
<tr>
<th>My Forms</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All Forms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Progress</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inbox</td>
<td></td>
<td></td>
</tr>
<tr>
<td>En Route</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form Status</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Showing 1–3 of 3

Create New Form

Display Options

- Form Title
- Employee
- Step
- Date Assigned
- Step Due Date
- Form Start Date
- Form End Date
- Form Due Date
- Last Modified

The name listed is for tracking purposes only - for questions regarding this form contact Support

Figure 21: Display options for My Forms page
Category 2 – Editing Your eIDP Goals

To make edits to your eIDP goals, select your Development Plan and scroll down to your goals. From here, you can add, edit, and remove goals.

![Diagram of Development Plan](image)

Figure 22: Add, Edit, and Remove Goal options on Development Plan

Selecting **Add Goal** or the **Edit** icon display a very similar pop-up window to customize the goal.

![Diagram of Edit Developmental Goal](image)

Figure 23: Edit Developmental Goal pop-up window

Selecting the **Delete Learning** icon will display a confirmation pop-up window. Upon selecting **Yes**, the goal will be deleted.
Category 3 – Editing Activities Associated with Your Goals

At a minimum, you will need to edit all the EXTERNAL activities to ensure your eIDP reflects your progress.

Like the goal-specific pop-up window, there is an activity-specific pop-up window. To delete a learning activity, select the Delete Learning icon. To add a new learning activity, select the Add New Learning Activity link. A pop-up window displays where you can search for and select the desired learning activity.

![Development Plan with options to add/edit learning activities](image)

*Figure 24: Development Plan with options to add/edit learning activities*
Saving and Printing Your eIDP

Access the My Forms and select your eIDP.

The eIDP displays. You can select the Print button to print the form or the PDF button to save the form as a PDF. Also, be sure to periodically select the Save button to save any changes before submission.
Selecting the **Print** button provides you sections to print and a print preview. Select the **Print** button again to print.

![Print Setup](image)

**Figure 27: Print preview page with print options**

The **PDF** button displays an identical screen with the exception that the **Print** button instead reads **Show PDF**.
Creating the eIDP from a Previous Plan

When creating subsequent eIDPs, you do not need to start from scratch. If goals are to be carried over to another eIDP, you may create it by using a previous plan.

To do this, access the Development page from the Home dropdown menu.

Select Add New at the top of the page. Then, select Copy From Other Development Goal Plan.

Figure 28: Home page navigation to the Development page

Figure 29: Copy From Other Development Goal Plan option on eIDP form
In the pop-up window, select the corresponding radio button of plan you want to copy goals from. Then, select Next.

**Figure 30: Step 1. Select Goal Plan pop-up window**

Select the checkboxes corresponding to goals you wish to copy to the new goal plan. Then, select Copy.

**Figure 31: Step 2. Select Goal pop-up window**
The pop-up window closes and your plan displays with the copied goal(s) from the previous year’s plan into your current year plan along with any other goals previously added to the plan.

![Figure 32: Example Goal Plan](image-url)
Create an eIDP with Competencies

Creating Your eIDP

Access the TMS Home Page

Access the IE browser and enter this URL: https://www.tms.va.gov/SecureAuth35/ and log in to the TMS 2.0. The TMS Home page displays.

Figure 12: TMS Home Page
Access eIDP in the Home Menu

On the TMS Home page, select the **Home** dropdown menu. Select **IDP/Competency Assessments**.

![Figure 13: Home menu with IDP/Competency Assessments highlighted](image-url)
The **IDP/Competency Assessments Forms** page displays.

![My Forms page](image)

**Figure 14: My Forms page**

Information about any existing forms displays. As shown in Figure 3, you can create and view in progress and completed forms.

**Create eIDP**

On the My Forms page, select the **Create New Form** button.

![My Forms page with Create New Form button highlighted](image)

**Figure 15: My Forms page with Create New Form button highlighted**
Select the hyperlinked name of the appropriate form. If you are reviewing an existing eIDP that was sent back from your supervisor for revision, it will display here (In Progress > Inbox).

![Figure 16: Form type selection](image)

If completing the form on your behalf, select your hyperlinked name.

![Figure 17: Subject of IDP link](image)
Select the appropriate review period and due date. Then, select the **Create and Open** button.

**Figure 18: Review period options**

Figure 19 shows an example of a development plan.

**Figure 19: Example of an incomplete development plan**

To complete the Competency Assessment, select the **Competency Assessment** tab or use the scroll bar to scroll down the page.
Complete each section of the Competency Assessment by selecting the dropdown arrows and rating each category using the radio buttons on the right side.

**Figure 20: Competency Assessment**

As shown in Figure 9, you may choose one of five options for each category: Novice, Foundational, Intermediate, Advanced, or Expert.

Select the **Show behavior descriptions** link to learn more about each.
Add a Competency Development Objective

Once the Competency Assessment is completed, select **Add Goal** under the Development Plan section.

**Figure 21: Development Plan section**

The Add Development Goal window displays.

**Figure 22: Add Development Goal pop-up window**

You must enter a **Goal Name**. You can optionally enter **Category**, **Expected Outcome**, **Estimated** and **Actual Cost**, and **Goal Start** and **Due Date**.
Next, select the applicable **Competencies**, which are not required, and the **Status**, which is a required field. Once the goal is completed, you can enter the **Date Completed**. Then, select the **Save & Close** button.

![Add Competencies](image)

**Figure 23: Add Development Goal pop-up window**

The development goal displays. Select the **Add New Learning Activity** link to associate a learning activity with the goal. You can add multiple.

![Development Plan](image)

**Figure 13: Add New Learning Activity to Development Plan**

The Search pop-up window displays. Use the Search field to locate the desired learning activity.
Once the learning activity is located, select **Add to Learning Plan** and then select **Done**. You are returned to the Development Plan.

The selected learning activity displays under the specified goal.
Submit Your eIDP for Approval

After your goals are added, scroll down to the Comments section where you can add comments to send along to your supervisor with your completed Development Plan. Once reviewed, if your supervisor returns your eIDP with comments, those comments will display under the Supervisor Comments section. Then, select the Send to Supervisor for Approval button.

A summary page displays, indicating the supervisor to whom the Development Plan will be sent for approval. To confirm, select the Send to Supervisor for Approval button.
You are turned to your My Forms page. Select the En Route tab to check on the status of your Development Plan.

Any forms sent for approval display. Here, you can see the Development Plan is with the supervisor for approval. Once it has been approved, it will display in your My Forms Inbox.
### Figure 20: My Forms page displaying IDP submitted for supervisor approval

Any associated learning activities for approved Development Plans will display in your My Learning.
Editing Your eIDP

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![Figure 21: Display options for My Forms page](image-url)
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![Development Plan with options to add/edit learning activities](image)

**Figure 24: Development Plan with options to add/edit learning activities**
Saving and Printing Your eIDP

Access the My Forms and select your eIDP.

The eIDP displays. You can select the **Print** button to print the form or the **PDF** button to save the form as a PDF. Also, be sure to periodically select the **Save** button to save any changes before submission.

---

**Figure 25: My Forms page displaying the eIDP**

**Figure 26: eIDP form with Print, PDF, and Save buttons highlighted**
Selecting the **Print** button provides you sections to print and a print preview. Select the **Print** button again to print.

![Print Setup](image)

**Figure 27: Print preview page with print options**

The **PDF** button displays an identical screen with the exception that the **Print** button instead reads **Show PDF**.
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![Figure 31: Step 2. Select Goal pop-up window](image)
The pop-up window closes and your plan displays with the copied goal(s) from the previous year’s plan into your current year plan along with any other goals previously added to the plan.

Figure 32: Example Goal Plan