VA LEARNING UNIVERSITY

VA TMS Electronic Individual Development Plan (eIDP)

CAREER PLANNING | VA TMS eIDP

Crosswalk from VA Standard Form 4692

May 2014

VA LEARNING UNIVERSITY

U.S. Department of Veterans Affairs

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Crosswalk Description

This purpose of this document is to provide you with a crosswalk example comparing the VA paper-based IDP form (VA Standard Form 4692) to the TMS eIDP. The document shows you each field on the Standard Form 4692 followed by a comparison screen shot in the eIDP where you should document the same or similar information.

Here is a screen shot of the VA Standard Form 4692.

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INDIVIDUAL DEVELOPMENT PLAN

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1. NAME OF EMPLOYEE	2. PRESENT POSITION TITLE	3. GRADE AND SERIES	4. DATE ASSIGNED	5. ORGANIZATION AND LOCATION	6. TELEPHONE NO.

7. SHORT-TERM CAREER GOALS *(1 Year)*	8. LONG-TERM CAREER GOALS *(2-3 Years)*

9. DEVELOPMENTAL OBJECTIVE	10. DEVELOPMENTAL ACTIVITIES *(Include length, source, and location of activities)*	11. DATE COMPLETED		12. COST		13. ACTION A = APPROVED B = DISAPPROVED C = DEFERRED	14. ASSESSMENT *(*Supervisor refer to key below)*
		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL		

* Assessment Key
A. Developmental objective was accomplished.
B. Developmental objective was accomplished although employee did not complete designated activities.
C. Progress has been made in accomplishing the developmental objective but further development is required.
D. Developmental objective not accomplished.
E. Developmental objective no longer applies.

VA FORM MAY 1992(R) **4692** AdobeFormsDesign

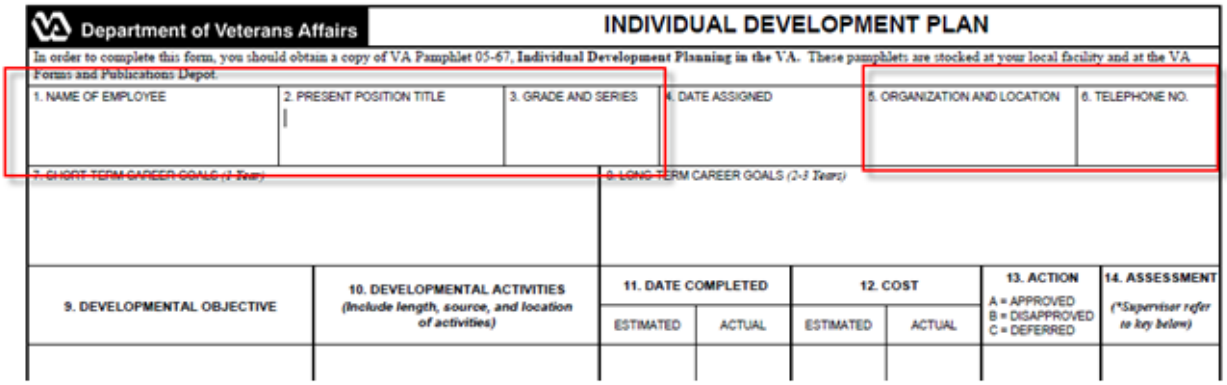
Figure 1: Image of VA Standard Form 4692 Individual Development Plan.

Basic Employee Information

Form 4692: Steps 1-3 and 5-6

Basic Employee Information:

1. *Name*
2. *Present Position Title*
3. *Grade and Series*
4. *Organization and Location*
5. *Telephone*



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7. SHORT TERM CAREER GOALS *(1 Year)*	8. LONG TERM CAREER GOALS *(2-3 Years)*

9. DEVELOPMENTAL OBJECTIVE	10. DEVELOPMENTAL ACTIVITIES *(Include length, source, and location of activities)*	11. DATE COMPLETED		12. COST		13. ACTION	14. ASSESSMENT
		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL	A = APPROVED B = DISAPPROVED C = DEFERRED	*(*Supervisor refer to key below)*

Figure 2: Image of VA Standard Form 4692 Individual Development Plan highlighting the Basic Employee Information sections including the Name of Employee, Present Position Title, Grade and Series, Organization and Location and Telephone Number.

TMS: Basic Employee Information

In the TMS, all of your relevant basic employee information has already been loaded through the HR data feed. It is not necessary for you to edit any of this data. This information is visible in the Talent Profile section of the TMS.

Here is a screenshot of the VA TMS Talent Profile screen.

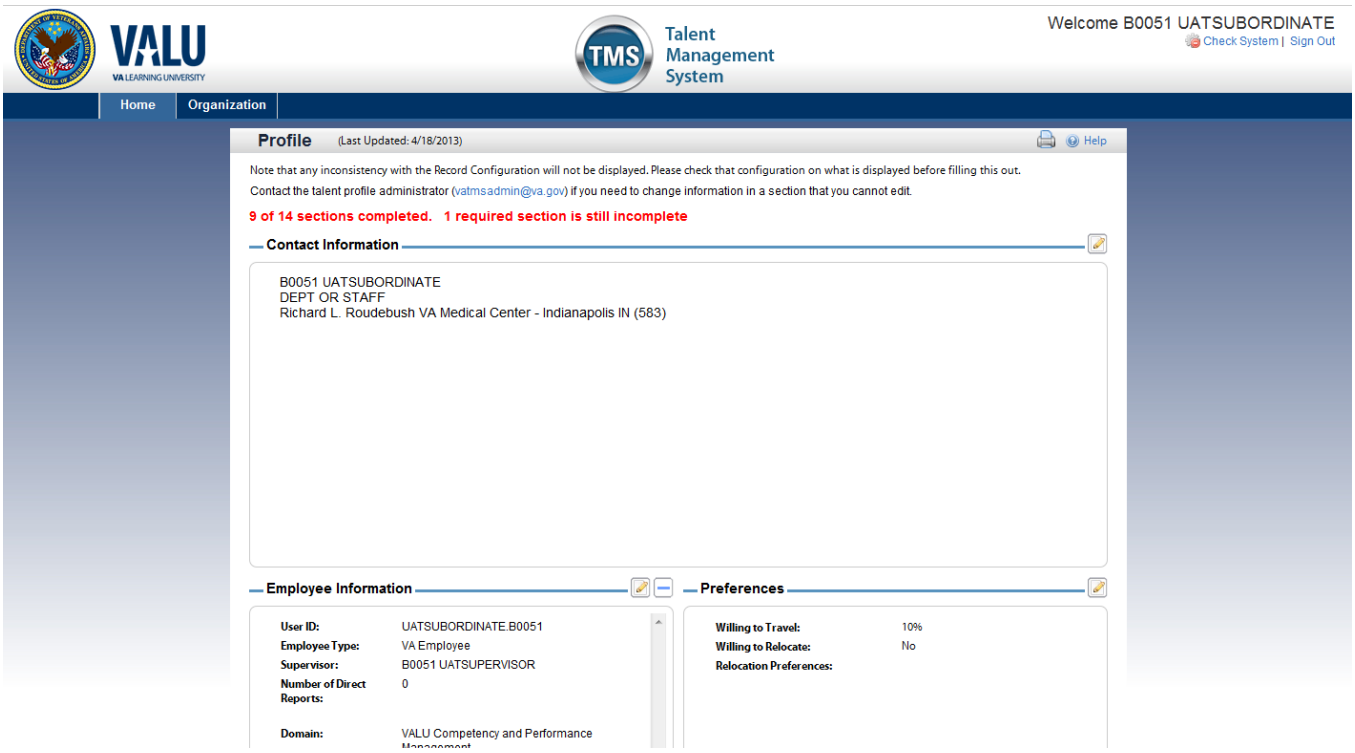
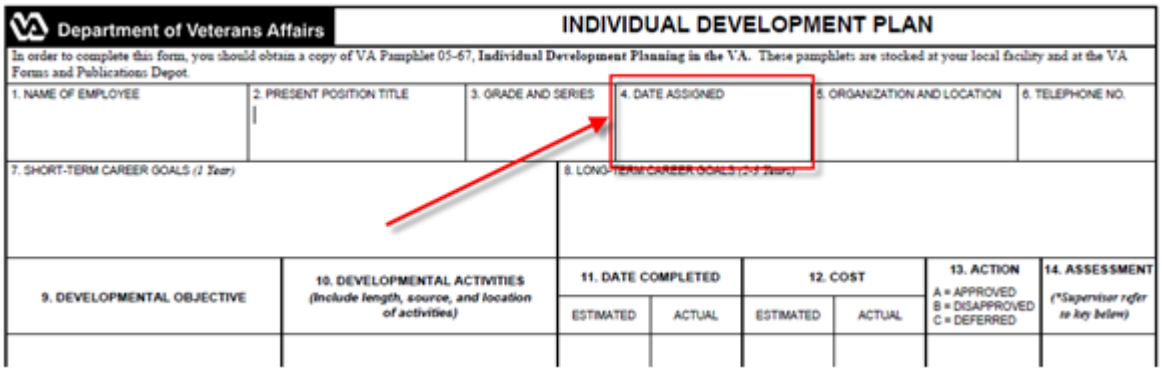


Figure 3: Image of VA TMS Talent Profile screen that includes Contact Information, Employee Information and Preferences.

IDP Effective Dates

Form 4692: Step 4

Date Assigned



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7. SHORT-TERM CAREER GOALS *(1 Year)*	8. LONG-TERM CAREER GOALS *(2-5 Years)*

9. DEVELOPMENTAL OBJECTIVE	10. DEVELOPMENTAL ACTIVITIES *(Include length, source, and location of activities)*	11. DATE COMPLETED		12. COST		13. ACTION A = APPROVED B = DISAPPROVED C = DEFERRED	14. ASSESSMENT *(*Supervisor refer to key below)*
		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL		

Figure 4: Image of VA Standard Form 4692 Individual Development Plan highlighting Date Assigned section.

TMS: Effective Date and Expiration Date

In the TMS, you select the Effective Date and Expiration Date when you create your eIDP. These dates will typically coincide with the beginning and ending of the fiscal year; however, these dates can vary by organization or program.

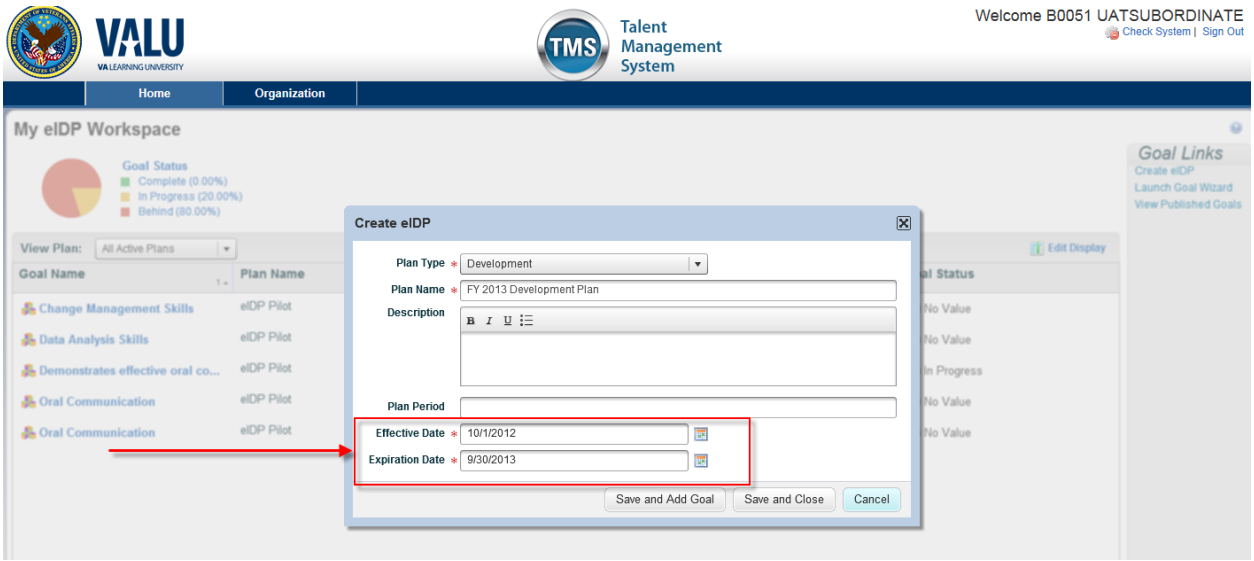
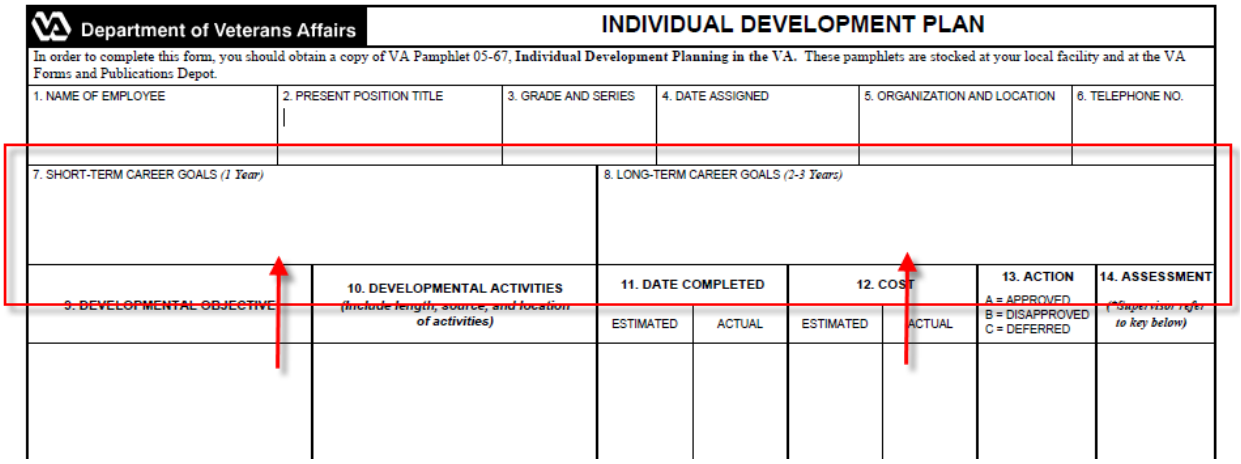


Figure 5: Image of VA TMS My eIDP Workspace screen with Create eIDP screen highlighting Effective Date and Expiration Date fields.

Short-Term Goals and Long-Term Goals

Form 4692: Steps 7 and 8

Short Term Career Goals (1 year) and Long-Term Career Goals (2-3 years)



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7. SHORT-TERM CAREER GOALS *(1 Year)*	8. LONG-TERM CAREER GOALS *(2-3 Years)*

9. DEVELOPMENTAL OBJECTIVE	10. DEVELOPMENTAL ACTIVITIES *(Include length, source, and location of activities)*	11. DATE COMPLETED		12. COST		13. ACTION A = APPROVED B = DISAPPROVED C = DEFERRED	14. ASSESSMENT *(*Supervisor refer to key below)*
		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL		

Figure 6: Image of VA Standard Form 4692 Individual Development Plan highlighting the Short-Term Career Goals and Long-Term Career Goals sections.

TMS: Short-Term Goals and Long-Term Goals

For each goal you define in the TMS, you can edit the goal using the Goal Edit screen. On this screen, you can identify the goal as either a "Short-Term Goals (1 year)" or a "Long-Term Goals (2-3 years)" by selecting the appropriate option in the Section drop-down field list.

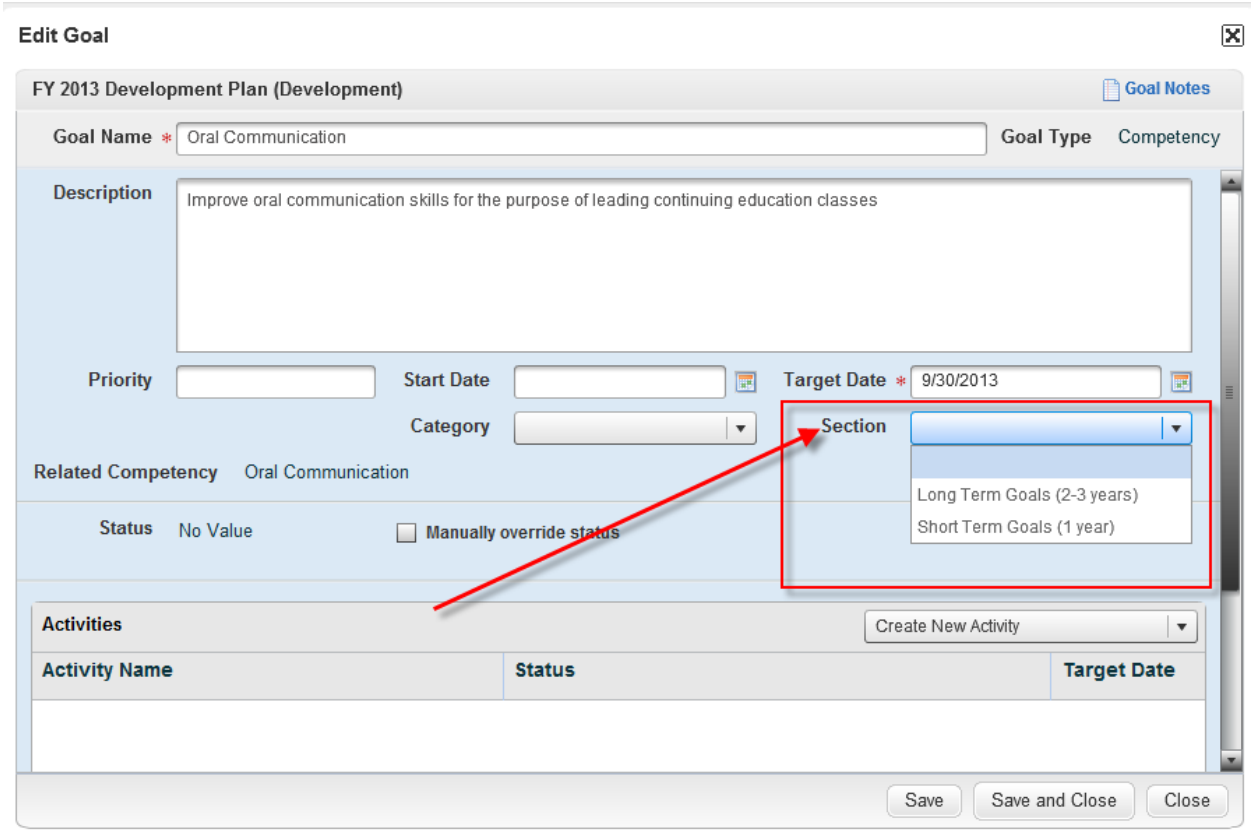
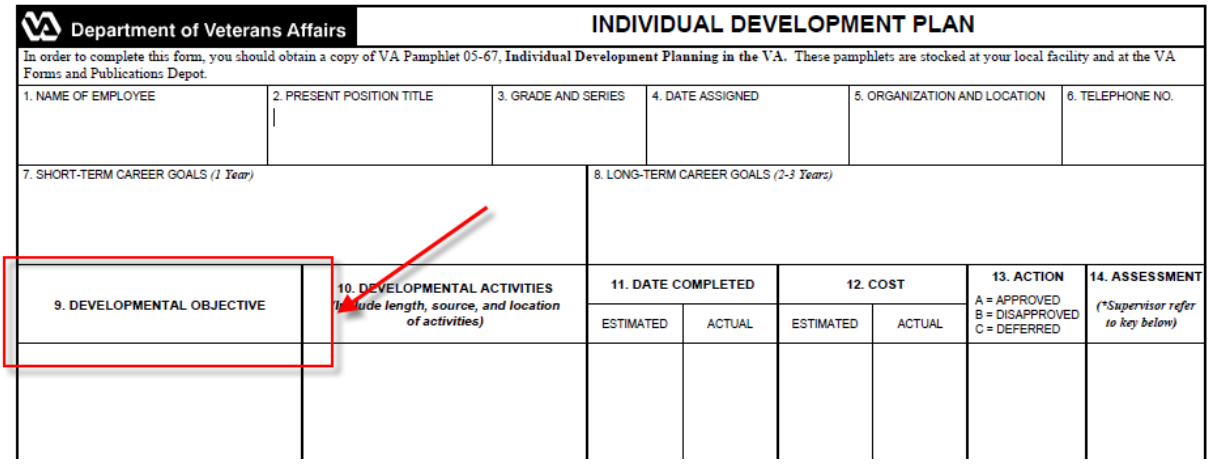


Figure 7: Image of VA TMS Edit Goal screen highlighting the Section field drop-down list showing "Short-Term Goals" and "Long-Term Goals" options.

Developmental Objective / Goal Name

Form 4692: Step 9

Developmental Objective



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9. DEVELOPMENTAL OBJECTIVE	10. DEVELOPMENTAL ACTIVITIES *(Include length, source, and location of activities)*	11. DATE COMPLETED		12. COST		13. ACTION A = APPROVED B = DISAPPROVED C = DEFERRED	14. ASSESSMENT *(*Supervisor refer to key below)*
		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL		

Figure 8: Image of VA Standard Form 4692 Individual Development Plan highlighting Developmental Objective section.

TMS: Goal Name

On the Goal Wizard screen in the TMS, the Goal Name field mirrors the Development Objective field on the Standard Form.

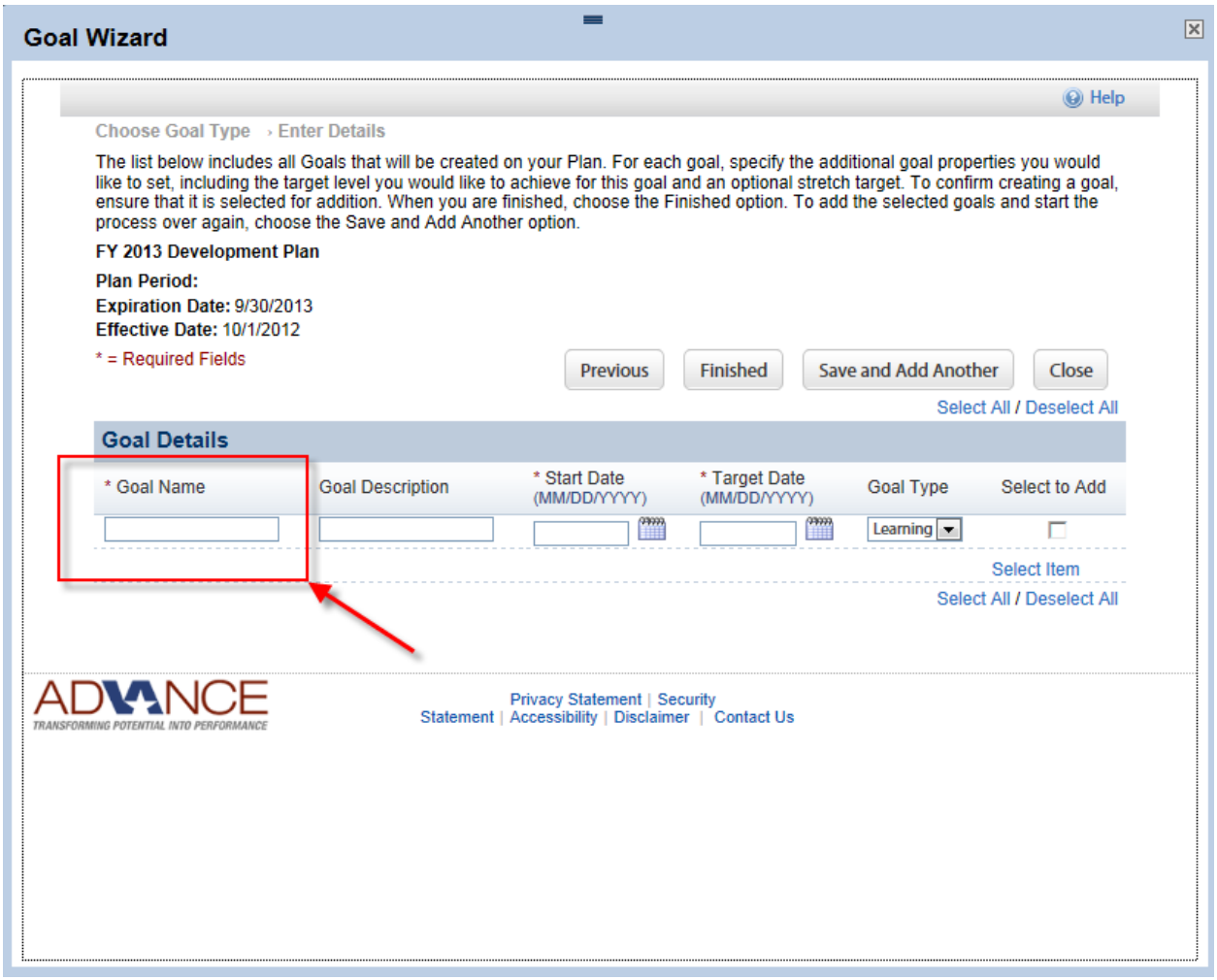
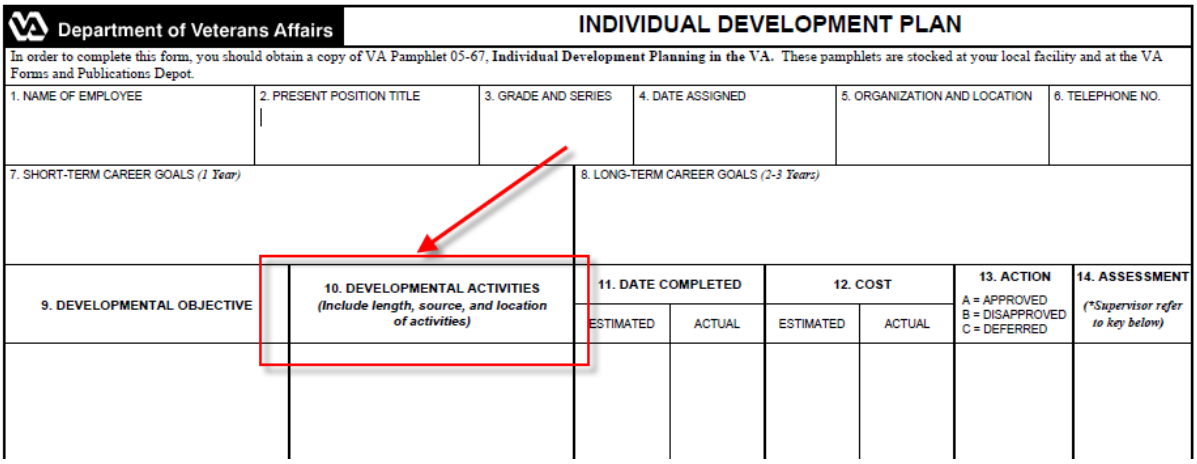


Figure 9: Image of VA TMS Goal Wizard screen highlighting Goal Name field.

Developmental Activities

Form 4692: Step 10

Developmental Activities



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		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL		

Figure 10: Image of VA Standard Form 4692 Individual Development Plan highlighting Developmental Activities section.

TMS Option 1: Add a developmental activity using the Goal Wizard
On the Goal Wizard screen, you can add a learning item ("Learning" option) or an external activity ("External" option) in the Goal Type field drop-down list. A learning item is a TMS item, which you can select from a catalog. An external activity is something outside the TMS that you would describe.

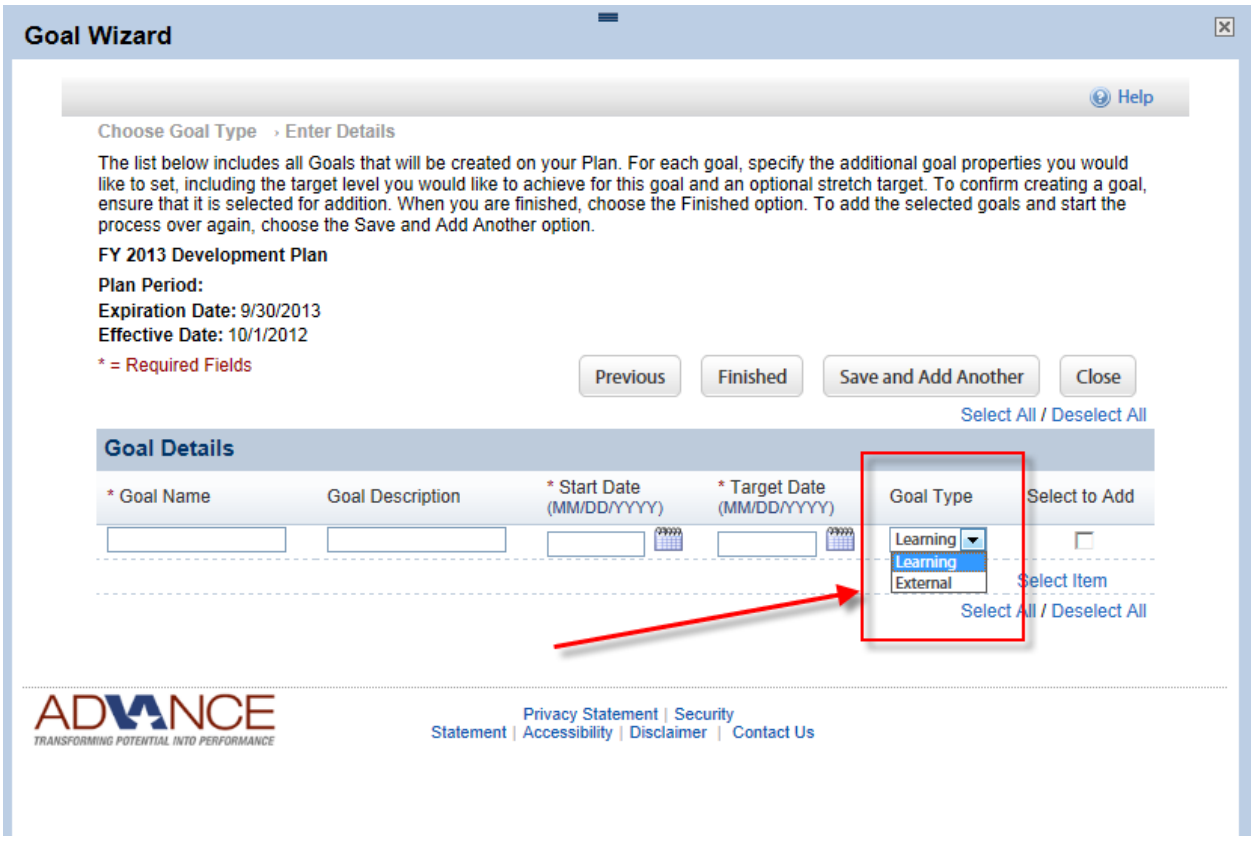


Figure 11: Image of VA TMS Goal Wizard screen highlighting Goal Type field drop down list showing "Learning" and "External" options.

TMS Option 2: Add a developmental activity using the Edit Goal screen
On the Edit Goal screen, you can add developmental activities using the Create New Activity field drop-down list. You select either the "Create Activity using Learning Items" or the "Create External Activity" option.

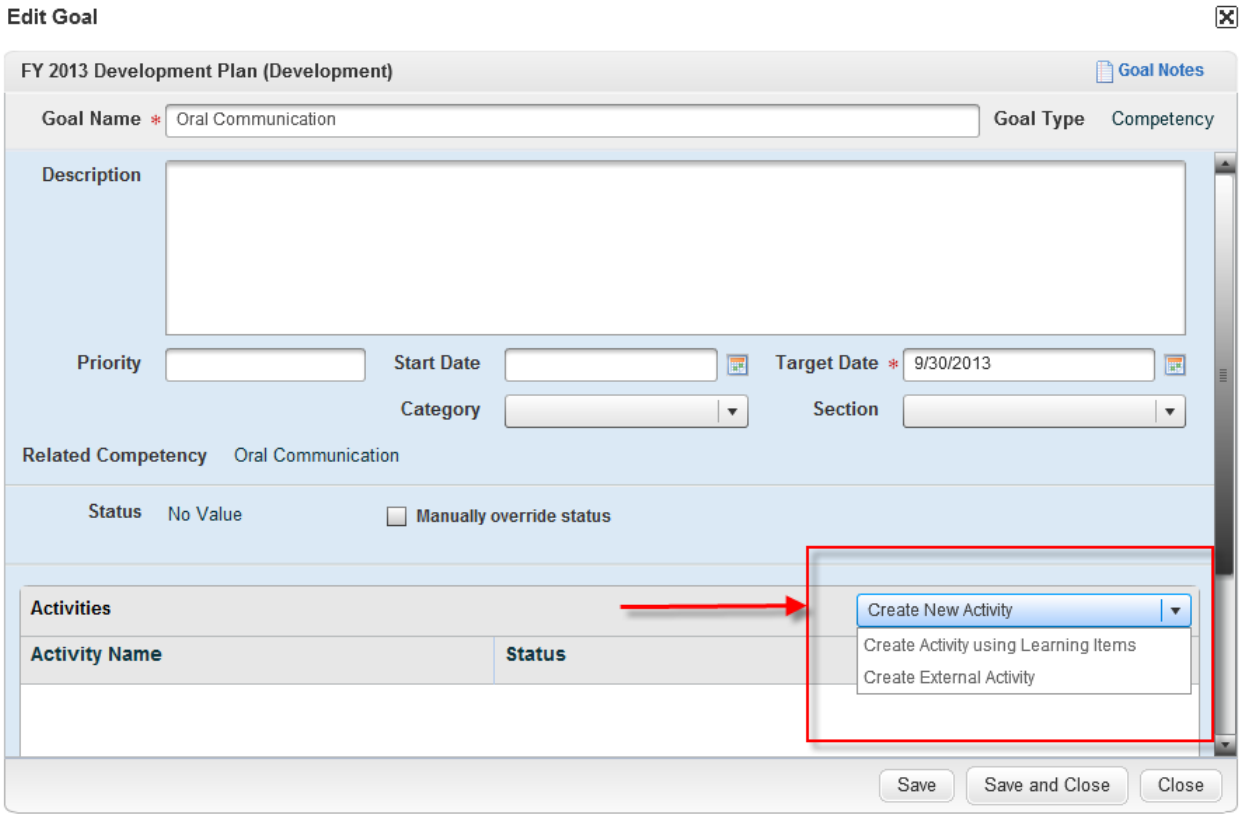
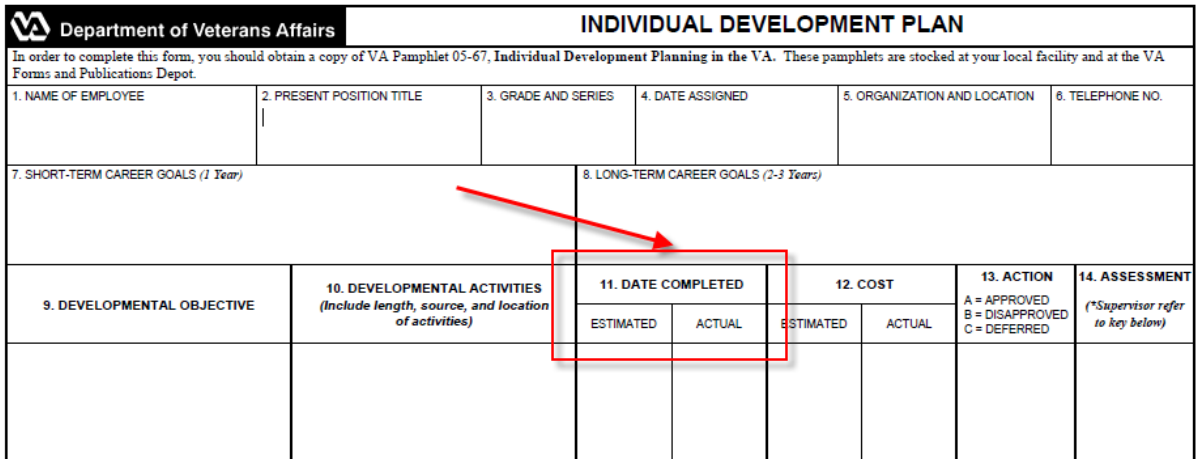


Figure 12: Image of VA TMS Edit Goal screen highlighting Create New Activity field drop-down list showing "Create Activity using Learning Items" and "Create External Activity" options.

Date Completed

Form 4692: Step 11

Date Completed: Estimate and Actual



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		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL		

Figure 13: Image of VA Standard Form 4692 Individual Development Plan highlighting the Date Completed section.

TMS: Estimated Date Completed

On the Goal Wizard screen, you select the Estimated Date Completed in Target Date field.

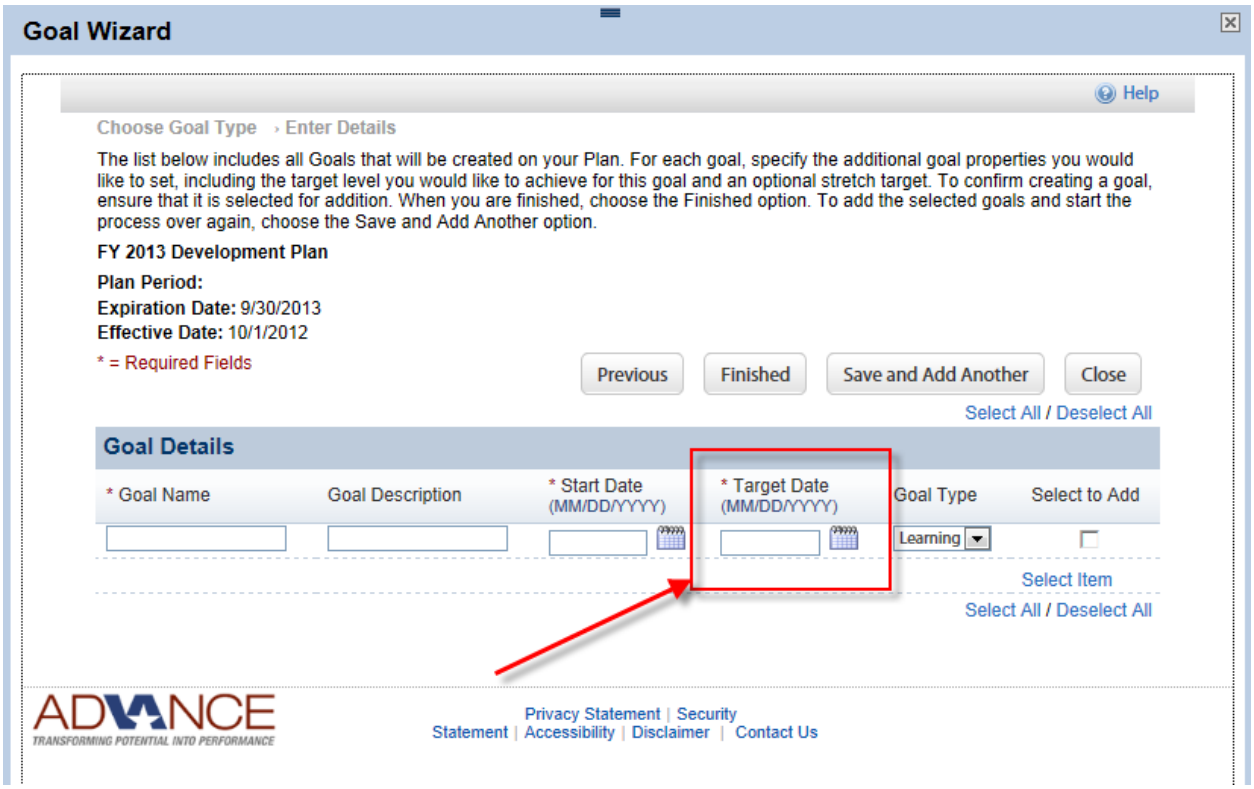


Figure 14: Image of VA TMS Goal Wizard screen highlighting the Target Date field.

TMS: Actual Date Completed

On the Edit Goal screen, the TMS automatically records the Actual Date Completed when either you or your supervisor changes the goal status to “Complete” in the Status field drop-down list.

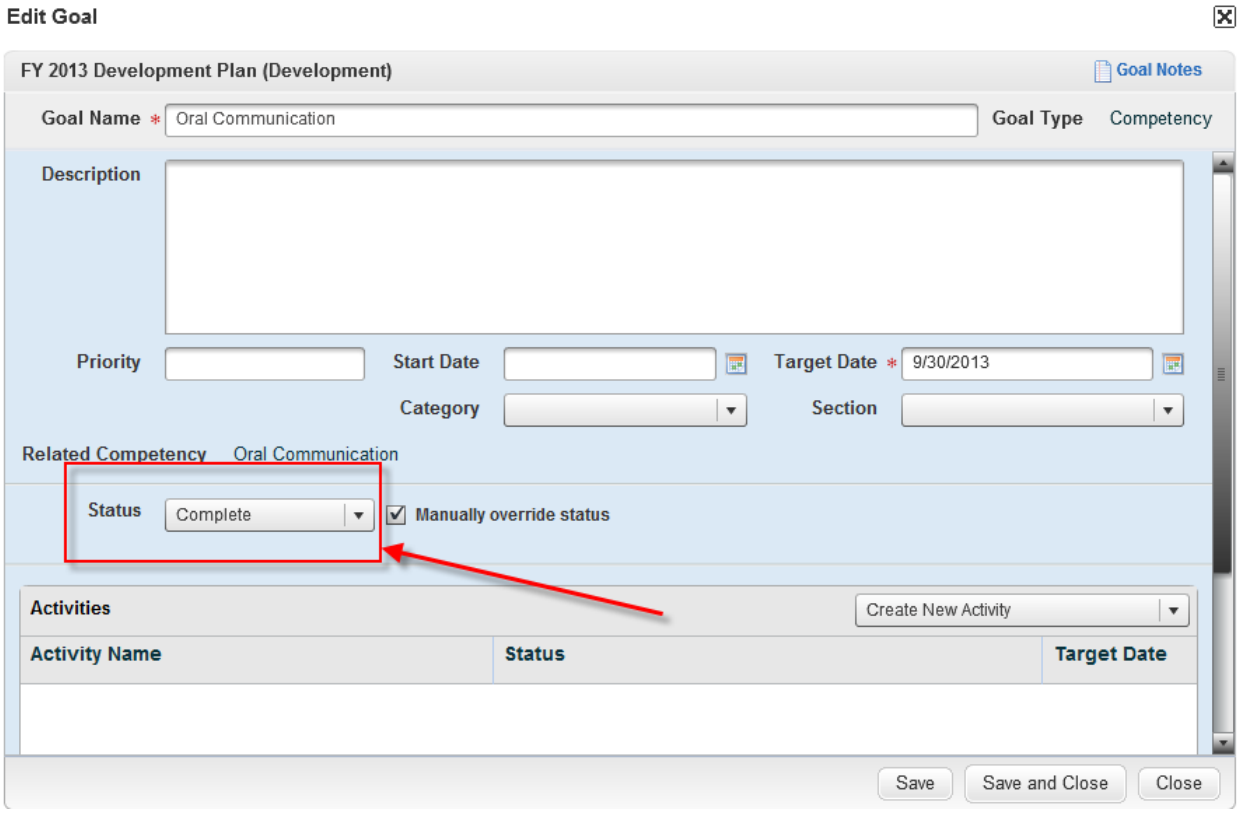
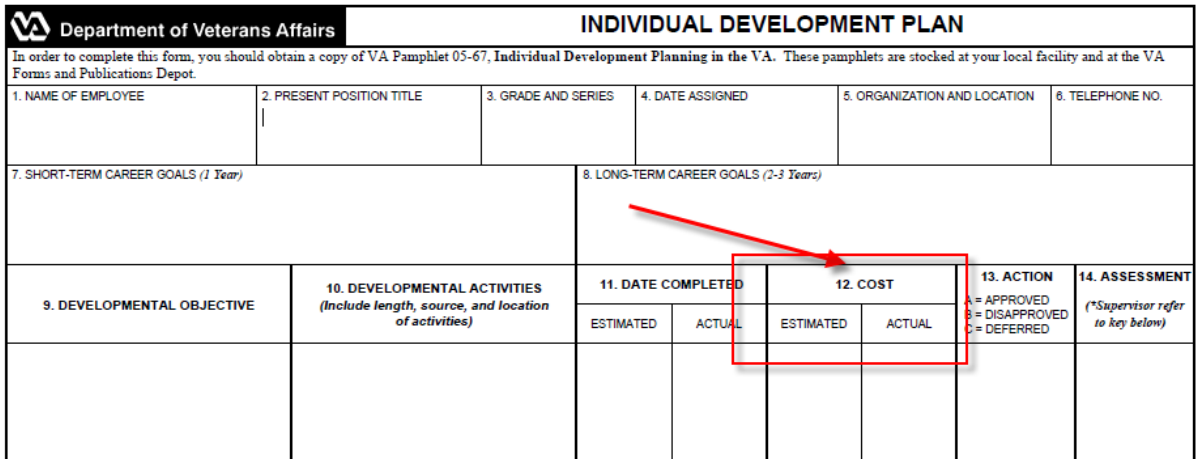


Figure 15: Image of VA TMS Edit Goal screen highlighting Status field drop-down list displaying a “Complete” status.

Cost

Form 4692: Step 12

Cost: Estimated and Actual



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		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL		

Figure 16: Image of VA Standard Form 4692 Individual Development Plan highlighting the Cost section.

TMS: Estimated and Actual Cost

On the Goal Edit screen, you can enter cost data in the Estimated Cost and Actual Cost fields.

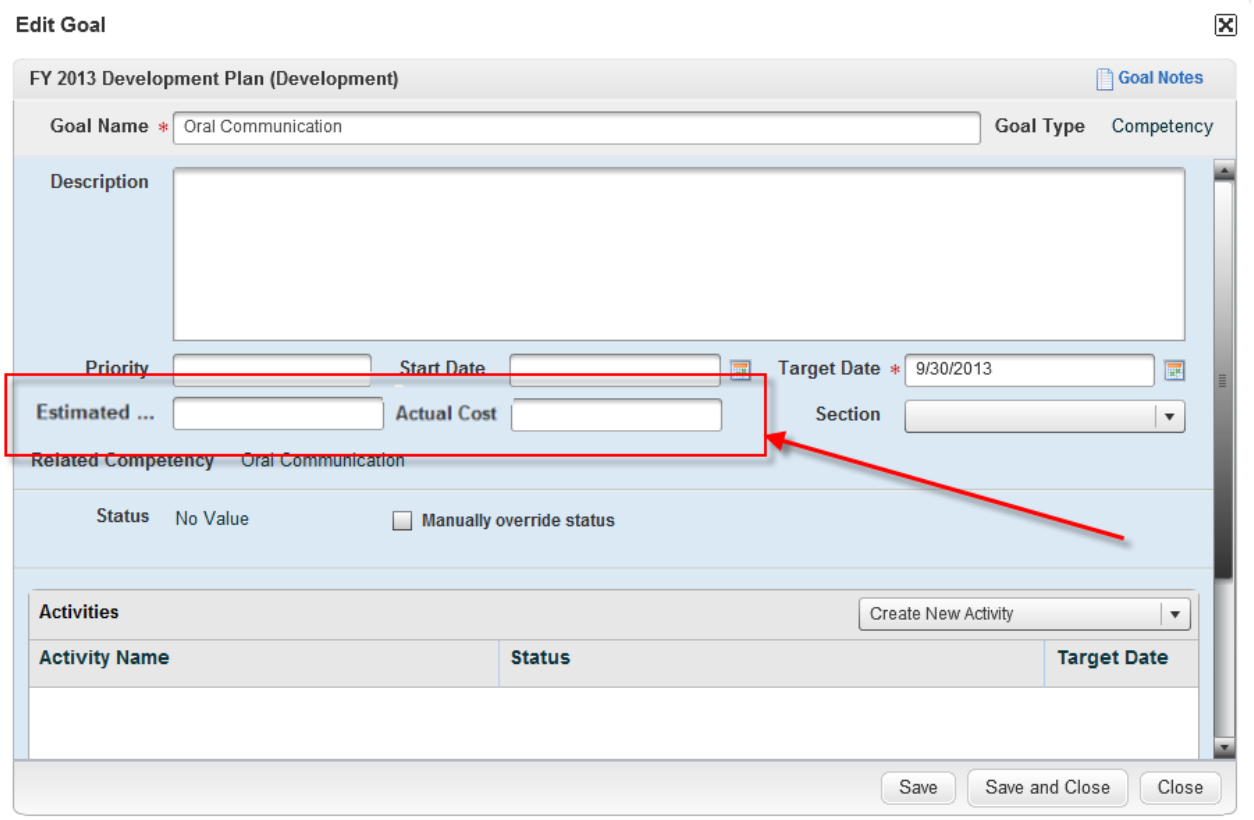


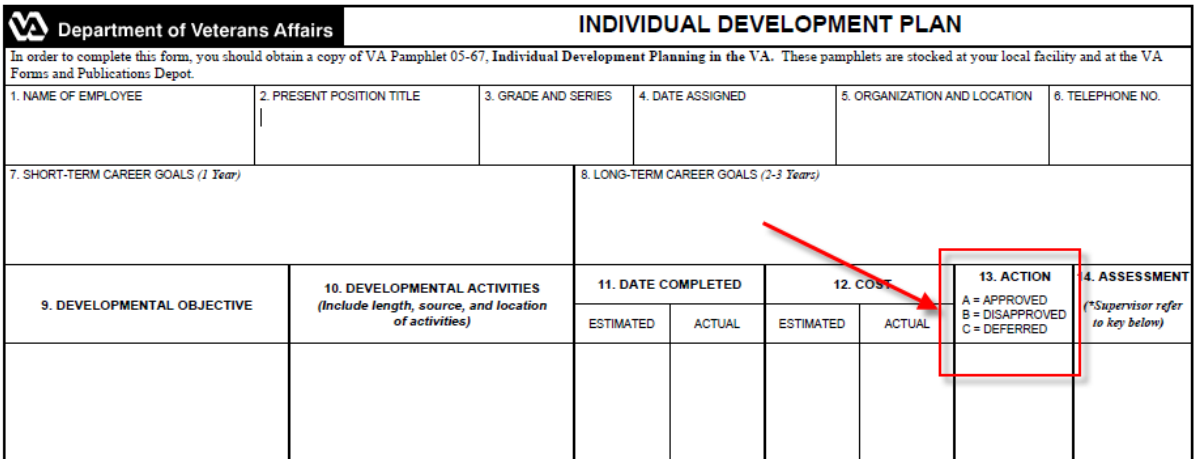
Figure 17: Image of VA TMS Edit Goal screen highlighting the Estimated Cost and Actual Cost fields.

Action

Form 4692: Step 13

Action

A: Approved
B: Disapproved
C: Deferred



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		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL		

Figure 18: Image of VA Standard Form 4692 Individual Development Plan highlighting Action section.

TMS: Supervisor Approves or Denies eIDP

Unlike the Form 4692, the TMS does not provide an option to approve or disapprove each goal individually. However, when the supervisor does not agree with a specific goal, he/she can deny the eIDP. The supervisor is then required to add a note to the employee explaining why he/she rejected and include instructions to change, remove, or add another goal.

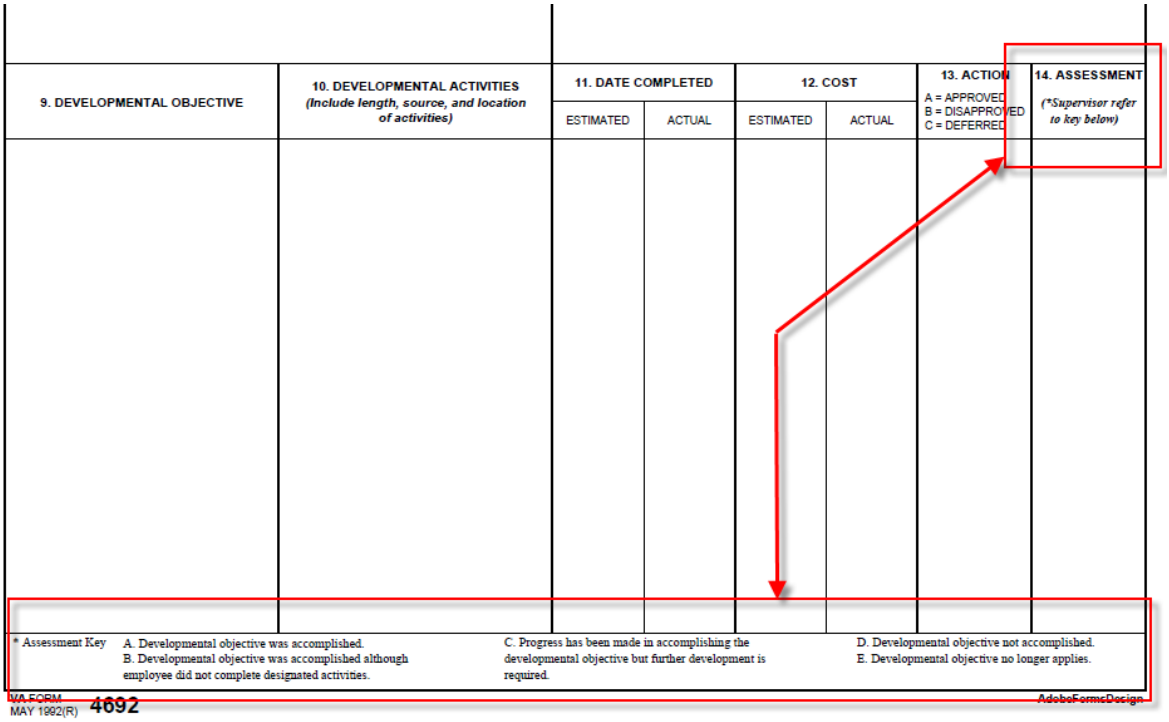
Figure 19: Image of VA TMS Supervisor Approval of Plans screen highlighting the Approve and Deny buttons.

Assessment

Form 4692: Step 14

Assessment: (Supervisor refer to key below)

A. *Developmental objective was accomplished*
B. *Developmental objective was accomplished, although employee did not complete designated activities*
C. *Progress has been made in accomplishing the developmental objective but further development is required*
D. *Developmental objective not accomplished*
E. *Developmental objective no longer applies*



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		ESTIMATED	ACTUAL	ESTIMATED	ACTUAL		

* Assessment Key
A. Developmental objective was accomplished.
B. Developmental objective was accomplished although employee did not complete designated activities.
C. Progress has been made in accomplishing the developmental objective but further development is required.
D. Developmental objective not accomplished.
E. Developmental objective no longer applies.

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Figure 20: Image of VA Standard Form 4692 Individual Development Plan highlighting the Assessment and Assessment Key sections.

TMS: Goal Status

On the My eIDP Workspace screen, when either you or your supervisor hovers the mouse over a goal, the Options hover box appears. In the hover box, you or your supervisor can update the goal status using the "Update Status" option. The TMS automatically records all updates in the eIDP Changes Log.

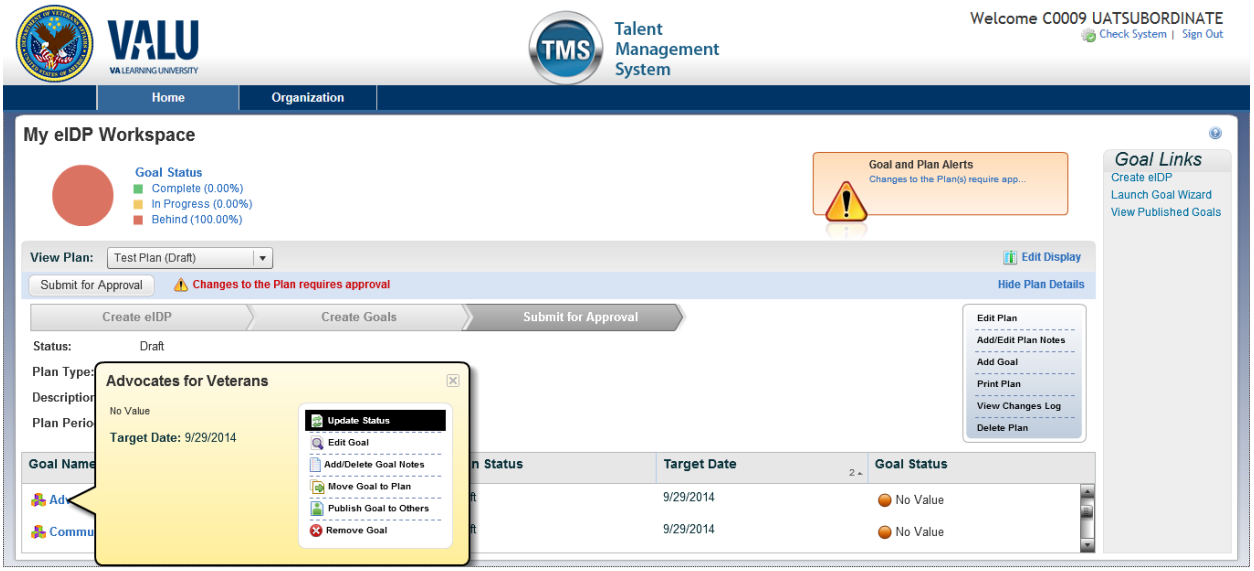

Figure 21: Image of VA TMS My eIDP Workspace screen showing goal Options hover box highlighting the "Update Goal" option.

TMS: Remove Goal

If an individual goal is no longer applicable, either you or your supervisor can delete the goal. On the My eIDP Workspace screen, when you or your supervisor hovers the mouse over the goal, the Options hover box appears. In the hover box, you or your supervisor can remove the goal using the "Remove Goal" option. The TMS automatically recorded this action in the eIDP Changes Log.

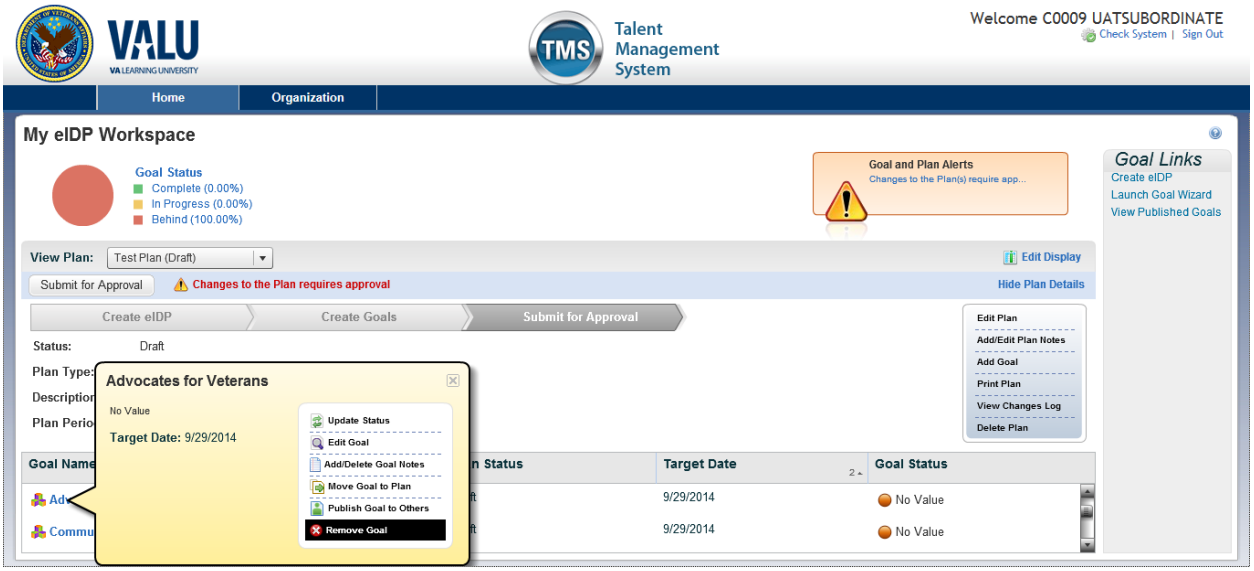

Figure 22: Image of VA TMS My eIDP Workspace screen showing goal Options hover box highlighting the "Remove Goal" option.