VA TMS Electronic Individual Development Plan (eIDP) Reference Guide

Supervisor Job Aid: Managing Employee eIDPs

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Purpose

The purpose of this Job Aid is to guide you through the steps of reviewing, editing, and approving or denying your employees’ eIDPs in the TMS.

In this Job Aid, you will learn how to:

- Access an eIDP submitted for approval,
- Review the eIDP,
- Add notes to the eIDP,
- Print the eIDP,
- View the eIDP changes log, and
- Approve or deny the eIDP.
Accessing an Employee’s eIDP

Access the IE browser and enter this URL: https://www.tms.va.gov/learning/user/login.jsp. At the TMS Login screen, enter your TMS login credentials. Select the SIGN IN button. The TMS Home page displays.

Figure 1: TMS Home Page

Notice that there is a message displayed in your My Learning pod that indicates you have a plans to review and approve.

Figure 2: “You have Subordinate Plans that require Review and Approval” Message Displayed in the My Learning Pod
Locate the **Links** pod and select the **Approval** link.

![Image of Link Pod with Approval Highlighted]

**Figure 3: Callout of the Links Pod Showing the Approvals link Highlighted**
The **Pending Reviews and Approvals** screen displays.

![Pending Reviews and Approvals Screen](image)

**Figure 4: Pending Reviews and Approval Screen**
Reviewing Your Employee’s eIDP

All eIDPs that have been submitted for your approval will be listed in the **Subordinate Plan Approvals** area of the **Pending Reviews and Approvals** screen.

![Figure 5: Subordinate Plan Approvals Area](image)

To review a plan listed in this area, select the **REVIEW** button of the eIDP you must review.

![Figure 6: Call Out of Review Button](image)

The **Supervisor Approval of Plans** screen displays the selected eIDP.

![Figure 7: Supervisor Approval of Plans Screen Showing the Selected eIDP](image)

This screen provides information about the employee’s eIDP to include:

- Status of the eIDP – in this case the status indicates ‘Pending Approval’,
- Plan Type – this will always be ‘Development’,
- Description – this provides a brief description of the eIDP,
- Plan Period – this lists the start and end dates over which the eIDP pertains,
- Goals – this area of the screen lists all of the goals the employee has assigned to the eIDP.

You should review the goals of the eIDP. Do this by placing the cursor on the goal and selecting it. The View Goal screen displays. None of the information displayed on this screen can be edited.

![View Goal Screen](image)

Figure 8: View Goal Screen

You may view each activity associated with the goal. In the Activities area of the View Goal screen, select an Activity Name that is listed. The View Activity screen displays.
Figure 9: View Activity Screen

The **Activity Type** indicates if this activity is one selected from the TMS, designated as 'Item', or is an external activity, designated as 'external'. To return to the View Goal screen, select the **Close** button.

Return to the Supervisor Approval of Plans screen by selecting the **Close** button on the **View Goal** screen.
Supervisor eIDP Actions

On the **Supervisor Approval Plans** screen, there is a menu that allows the supervisor to add or edit notes, print the plan, view the plan’s change log, and view plan approvals.

![Figure 10: Call Out of the Menu of Supervisor Options on the Supervisor Approval Plans Screen](image)

**Add Plan Notes**

You may add notes to the eIDP that you wish to provide to the employee. From the menu, select **Add/Edit Plan Notes**.

![Figure 11: Menu with Add/Edit Plan Notes Option Highlighted](image)
The **Plan Notes** screen displays.

![Plan Notes Screen](image)

**Figure 12: Plan Notes Screen**

Type your note in the space provided.

![Plan Notes](image)

**Figure 13: Example of a Note**

In order to add this note to the eIDP, select the **Add** button. The note now displays in the **Notes Log** on the **Plan Notes** screen.
To return to the **Supervisor Approval Plans** screen, select the **Done** button.

**Printing the eIDP**

You may print the eIDP by selecting **Print Plan** from the menu.
The **Report Format** screen displays.

![Report Format Screen](image)

**Figure 16: Report Format Screen**

You may either select the **HTML** or **PDF** radio button. Once you have selected a button, select the **Print** button to continue. The TMS will collect the necessary information and then display the eIDP in the format you selected. The report will display in another browser window.

![Example of an eIDP](image)

**Figure 17: Example of an eIDP**
View Changes Log

In order to view the number and sequence of changes that have occurred to the eIDP, select the View Changes Log from the menu on the Supervisor Approval Plans screen.

Figure 18: Menu with View Changes Log Option Highlighted

The Change Log screen displays.

Figure 19: Change Log Screen

Return to the Supervisor Approval Plans by selecting the Close button.
**View Plan Approvals**

In order to view all actions that have occurred to the eIDP, select **View Plan Approvals** option on the menu on the **Supervisor Approval Plans** screen.

![Figure 20: Menu with View Plan Approvals Option Highlighted](image.png)

The **Approval Steps** screen displays.

![Figure 21: Approval Steps Screen](image.png)

Select the **Close** button to return to the Supervisor Approval Plans screen.
Approve or Deny the eIDP

Once you have reviewed the eIDP and added any notes, you must determine if you will approve or deny the eIDP. This is done using the Approve or Deny buttons located on the Supervisor Approval Plans screen.

![Supervisor Approval of Plans](image)

Figure 22: Supervisor Approval Plans Screen with the Approve and Deny Buttons Highlighted

Deny the eIDP

If you require the employee to update the eIDP, select the Deny button. The Deny Comment screen displays.

![Deny Comment Screen](image)

Figure 23: Deny Comment Screen

You must enter the reason for denying the eIDP. After entering the reason, you must select the Submit button.
Approve the eIDP

To approve the eIDP, select the **Approve** button. The **Pending Reviews and Approvals** screen displays.

![Pending Reviews and Approvals Screen](image)

### Figure 24: Pending Reviews and Approvals Screen

The **Subordinate Plan Approvals** area no longer displays the eIDP that was just approved.