VA TMS Electronic Individual Development Plan (eIDP) Reference Guide

Employee Job Aid: Creating an eIDP with Non-Competency Based Developmental Goals

November 2016
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Purpose

The purpose of this Job Aid is to guide you through the steps to create your eIDP, submit your eIDP to your Supervisor for approval, update your eIDP as you work on your competencies and goals, and print your eIDP.

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

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

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

**Task 2** provides step-by-step guidance for updating your eIDP as you work through your goals and activities.

**Task 3** 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 4** provides instructions on how to use a previous eIDP to create a new eIDP.
Task 1: Create Your eIDP

Access the TMS Home Page

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.

![TMS Home Page](image)

Figure 1: TMS Home Page
## Access eIDP in the Links Pod

On the TMS Home page, locate the **Links** pod. Select the **EIDP** link listed in this pod.

![Image: Links Pod with EDIP Link Highlighted]

*Figure 2: Links Pod with EDIP Link Highlighted*
The **My eIDP Workspace** page displays.

![My eIDP Workspace Screenshot](image-url)

**Figure 3: My eIDP Workspace Page**

Information about creating the eIDP is provided. As shown in Figure 3, creating your eIDP involves three core activities – Create eIDP, Create Goals, and Submit for Approval.

As you build your eIDP, all of the contents will display on this page.

**Create eIDP**

In the **Goal Links** area of the My eIDP Workspace page, select the **CREATE eIDP** link.

![Goal Links Screenshot](image-url)

**Figure 4: Goal Links Area with Create eIDP Highlighted**
The **Create eIDP** pop-up window displays.

![Create eIDP Pop-Up Window](image)

**Figure 5: Create IDP Pop-Up Window**

From the **Plan Type** drop-down list, select **DEVELOPMENT**.

![Plan Type Drop-Down List Showing Development](image)

**Figure 6: Plan Type Drop-Down List Showing Development**
The pop-up window now displays three additional fields – **Plan Period**, **Effective Date**, and **Expiration Date**.

![Create eIDP](image)

**Figure 7: Expanded Create eIDP Pop-Up Window**

You must enter:

- **Plan Name**,  
- Brief **description** of the plan,  
- **Effective Date** (typically, the start date of the fiscal year), and  
- **Expiration Date** (typically, this date will be the end date of the fiscal year).

Do not enter anything in **Plan Period**.
Figure 8 shows an example of a completed Create eIDP pop-up window.

![Create eIDP Pop-Up Window](image)

**Figure 8: Example of a Completed Create eIDP Pop-Up Window**

At this point, you may:

- Save and Add Goal – this creates the eIDP and then allows you to continue the process of building your eIDP,
- Save and Close – this creates the eIDP shell which you can then go back and add goals at a later time, or
- Cancel – this closes the Create eIDP window without creating an eIDP.
In this case, you will continue creating your eIDP. Select the **SAVE AND ADD GOAL** button. The **Goal Wizard** pop-up window displays.

![Goal Wizard Pop-up Window](image)

**Figure 9: Goal Wizard Pop-up Window**

As shown in Figure 9, you may choose to add four different types of goals to your eIDP:

- Competency Related Goal,
- Non-Competency Related Goal,
- Goal from a previous eIDP, and
- Goal from another person’s eIDP.
Add a Non-Competency Development Objective

Select the **ADD A NON-COMPETENCY DEVELOPMENT OBJECTIVE** radio button.

![Choose Goal Type](Image)

**Figure 10: Goal Wizard Pop-Up Window with Add a Non-Competency Development Objective Radio Button Selected**

Select the **NEXT** button. The **Goal Details** pop-up window displays.

![Goal Wizard](Image)

**Figure 11: Goal Details Pop-Up Window**

You must enter a:

- **Goal Name**,
- **Start Date**, and
- **Target Date**.
Enter your goal, a brief description of this goal, and the period of time over which you will work on and complete this goal.

You will now assign activities you will complete in order to achieve this goal. This is done via **Goal Type** which may be:

- Learning – this is an activity that resides in the TMS, and/or
- External – this is an activity that is not within the TMS.

You will first add a Learning activity. From the **Goal Type** drop-down list, select the **LEARNING** option. Then select the **SELECT ITEM** link.

![Figure 12: Learning Goal Type with Select Item Link Highlighted](image)

The **Search Items** pop-up window displays.

![Figure 13: Search Items Pop-Up Window](image)

This window allows you to search your assigned TMS catalogs to locate a specific learning item. Enter your search criteria in any or all of the fields shown on this screen. Then select the **SEARCH** button to locate the activity within the TMS catalog. All TMS
learning items that match the criteria display in the View Item Results window. A sample of TMS items tied to the search criteria ‘contains communication’ returns the results shown in Figure 14.

![View Item Results](image)

**Figure 14: Example of View Item Results Display Window**

From the list, select the SELECT link next to the learning item you want to add to this goal. You return to the **Goal Details** pop-up window. Make sure to check the **SELECT TO ADD** box so the activity is added to this goal on your eIDP.

![Goal Details](image)

**Figure 15: Completed Goal Details with a Learning Goal Type**

At this point, you want to add an external goal type. Select the **DONE** button.
Talent Management System

**Figure 16: Goal Details with the Done Button Highlighted**

You return to the My eIDP Workspace screen listing the eIDP you have just created.

**Figure 17: My eIDP Workspace Screen Showing the eIDP You Just Created**

Now you will add an EXTERNAL goal type to the goal listed in the Goal Name area of this screen. Select the goal name that is listed in this area (Figure 18).

**Figure 18: Goal Name Area of My eIDP Workspace Screen with Goal Highlighted**

The **Edit Goal** pop-up window displays.
Figure 19: Edit Goal Pop-up Screen
In the **Activities** area of the screen, select **Create External Activity** from the **Create New Activity** drop-down list.

![Create New Activity Drop-Down](image1)

**Figure 20: Create New Activity Drop-Down**

The **Create New Activity** pop-up window displays.

![Create New Activity Pop-Up Window](image2)

**Figure 21: Create New Activity Pop-Up Window**

You must enter an **Activity Name** and the **Target Date** for completion of this external activity. You may also select a status for this activity from the **Activity Status** drop-down list. An example of a completed screen is shown in Figure 22.
Select the **SAVE** button to save this external activity and return to the My eIDP Workspace page.

You repeat any or all of the above procedures until you have added all of your goals as well as all of the learning and external activities to these goals.

**Submit Your eIDP for Approval**

After you have added your goals (and their associated development activities), they will be listed on the My eIDP Workspace page. At this point, you are ready to submit your eIDP.
Select the **SUBMIT FOR APPROVAL** button. The **Submit for Approval** prompt displays.

![Submit for Approval Prompt](image)

**Figure 24: Submit for Approval Prompt**

If you are ready to submit, select the **YES** button. Your Supervisor will receive a notification to review and approve your eIDP.

Once it has been submitted, the **View Plan** drop-down box displays a “**Pending Approval**” message.

![Pending Approval Message](image)

**Figure 25: Pending Approval Message**

Note that immediately under the View Plan drop-box is the **RECALL PLAN** button.

This allows you to pull back your eIDP if you determine that additional updates are needed before your Supervisor reviews and approves it.

Once your Supervisor/Manager has approved your eIDP, updates will be made to the **My Learning Assignments** pod on your **TMS Home** page.
Figure 26: My Learning Assignments Pod on Your TMS Home Page

Once approved, all of the learning activities assigned to all of your goals display in this pod. This is a quick reminder that you have items you need to complete.
Task 2 – 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 four overall categories of modifications.

- **Category 1** – Edits that impact the display of information on the My eIDP Workspace page
- **Category 2** – Edits to the overall basic information of the eIDP
- **Category 3** – Edits to the goals of your eIDP
- **Category 4** – 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 any/all of 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 3 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 eIDP Workspace**

You may change both how and what information displays on the My eIDP Workspace page. To do this, select the **EDIT DISPLAY** button.

![Figure 27: My eIDP Workspace Page with the Edit Display Button Emphasized](image-url)
The **Edit Display** pop-up window displays.

![Edit Display Pop-Up Window](image)

**Figure 28: Edit Display Pop-Up Window**

The options on the window allow you to determine how you want the information to be sorted/organized as well as the specific information you want to display about the details of your eIDP.

You have a number of ways to sort/organize your eIDP. This is done by selecting the **Organize Table Display By** drop-down arrow.

![Organize Table Display by Drop-Down List Options](image)

**Figure 29: Organize Table Display by Drop-Down List Options with Plan Name Selected**

Select one of the options in order to sort your information. In Figure 28, **Plan Name** is selected.
In terms of the information that can display, select the checkboxes for the information you want to display about your eIDP on the My eIDP Workspace page.

**Figure 30:** Edit Display Pop-Up Window Options – Organize Table Display by PLAN NAME and Display Plan Name, Plan Status, Plan Type, Start Date, Target Date, and Goal Status Boxes Checked

Once you have made all of your selections, select the **SAVE** button.

Notice the display changes are now reflected on the My eIDP Workspace page.

**Figure 31:** My eIDP Workspace Page with the Information Organized by the FY2016 eIDP Plan Name and the Plan Type and Start Date for Each Goal Displayed
Category 2 – Editing the Overall Basic eIDP Information

The general information of your eIDP may be edited using one of two links located in the plan details section of the My eIDP Workspace.

![My eIDP Workspace Page with the Edit Option Links as a Call Out](image)

**Edit Your Basic eIDP Plan Information**

Select the **Edit Plan** link. The **Edit Plan** pop-up window

![Edit Plan Pop-Up Window](image)

You may edit any of the information shown on the Edit Plan pop-up window. Once you have made the changes, select the **SAVE AND CLOSE** button to update the information.
NOTE: editing any of this information requires that you re-submit your eIDP to your Supervisor for approval.

Add/Edit Plan Notes

Select the Add/Edit Plan Notes link to update any notes you have applied to your eIDP. The Plan Notes pop-up window displays.

![Plan Notes Pop-Up Window](image)

Figure 34: Plan Notes Pop-Up Window

To add notes:

1. Type your notes in the area located in the upper portion of this pop-up window.
2. If you do not want others to see your notes, select the checkbox tied to Private note (for yourself only). Otherwise, leave this box unchecked.
3. Select the ADD button.
4. The notes display in the Notes Log.

Figure 34 is an example of two notes added to the Notes Log – one note can be read by all while the second note may only be read by yourself.
Once all of the notes have been added, select the **DONE** button to add these notes to your eIDP.

**Category 3 – Editing Your eIDP Goals**

In order to make edits to your eIDP goals, hover over one of the goals shown on your eIDP. The Goal-Specific Edit pop-up window displays.

---

**Figure 35: Plan Notes Pop-Up Window Displaying Two Notes in the Notes Log Area**

**Figure 36: Goal-Specific Edit Pop-Up Window**
Update Your Goal Status

Select the **UPDATE STATUS** link. The Update Status pop-up window provides access to the list of activities you associated with the goal.

![Update Status Pop-Up Window](image)

**Figure 37: Update Status Pop-Up Window**

In Figure 36, there are four activities listed for the goal. Three of these activities have a status of AVAILABLE. Note that there is no way to edit the status of these three activities. These activities are tied to courses accessed via the TMS. As such, the only way the status can change is when you either begin or complete the course within the TMS. Once that occurs, the status is automatically updated.

Unlike the previous three, the fourth activity has a drop-down list associated with it. This is an external activity (i.e., one that you added that is not accessed through the TMS). This activity requires that you update its status. This is done by selecting on the drop-down arrow. This displays the external activity status options.
Select the desired option and then select the **SAVE** button.

**Edit Your Goal**
Select the **EDIT GOAL** link to open the Edit Goal pop-up window.
Add/Delete Goal Notes
Select the ADD/DELETE GOAL NOTES link. The Goal Notes pop-up window displays.

![Goal Notes Pop-Up Window](image)

**Figure 40: Goal Notes Pop-Up Window**

The steps for completing this screen are identical to those used to complete Plan Notes window presented earlier. To:

- Add a private note, hover in the blank space located at the top of the window. Type the note. Check the Private Note box. Select the ADD button.
- Add a note that both yourself and others can read, hover in the blank space located at the top of the window. Type the note. Make sure the Private Note box is unchecked. Select the ADD button.

All of the notes will display in the Notes Log area of the pop-up window.

When you have completed all of your notes, select the DONE button.
Category 4 – Editing Activities Associated with Your Goals

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

Similar to the goal-specific pop-up window, there is an activity-specific pop-up window.

From the Edit Goal pop-up window, hover over an activity to display the activity-specific links pop-up window.

![Figure 41: Activity-Specific Edit Links](image)

**Edit/Update**

Select the EDIT/UPDATE link. The Edit Activity pop-up window displays. The extent to which you may edit the activity information varies based on the activity type being EXTERNAL or one that was selected from the TMS catalog. In this later instance, the activity type is designated as ITEM.
You may edit the **NAME**, change the **TARGET DATE**, and/or change the **ACTIVITY STATUS**.

For **ITEM** activities, the following pop-up window displays:

Notice that you can only edit the **NAME** and/or **TARGET DATE**. The status is controlled by the TMS.
Add/Delete Activity Notes

Select the ADD/DELETE ACTIVITY NOTES link access the Activity Notes pop-up window.

![Activity Notes Pop-Up Window](image)

**Figure 43: Activity Notes Pop-Up Window**

The steps for completing this screen are identical to those used to complete Plan Notes window presented earlier. To:

- Add a private note, hover in the blank space located at the top of the window. Type the note. Check the Private Note box. Select the ADD button.
- Add a note that both yourself and others can read, hover in the blank space located at the top of the window. Type the note. Make sure the Private Note box is unchecked. Select the ADD button.

All of the notes will display in the Notes Log area of the pop-up window.

When you have completed all of your notes, select the DONE button.
View Item Details
This option is ONLY applicable for ITEM Activities.

Select the VIEW ITEM DETAILS link. The Confirm dialog box displays:

```
Confirm

⚠️ Do you want to Save the changes before leaving this page

Yes  No  Cancel
```

**Figure 44: Confirm Dialog Box**

As a standard practice, you should always select the YES button in order to ensure any changes you have made are saved.

Importantly, responding YES or NO, exits you from the eIDP pod. If you do not wish to exit, you must CANCEL.

Responding “Yes” or “No” takes you to the Items Detail page for the selected activity.
The Item Detail page for all activities within the TMS provides information about that activity in eight information areas to include:

- Item summary
- Assignment
- Subject Areas
- Prerequisites
- Substitutes
- Competencies
- Related Documents
• Accreditation

To return to your TMS Home Page, select the **My Learning** button.

![Figure 46: Snapshot of TMS Item Detail Page with My Learning Button Callout](image-url)
**Task 3 – Printing Your eIDP**

Access the My eIDP Workspace page and select the View Plan drop-down list. Select the eIDP you want to print.

![My eIDP Workspace](image)

**Figure 47: Your eIDP Plan**

From the links list, select **PRINT PLAN**.

![Print Plan](image)

**Figure 48: My eIDP Workspace Page Edit Links with Print Plan Circled**
The **Report Format** dialog box displays.

![Report Format Dialog Box](image)

**Figure 49: Report Format Dialog Box**

Select the radio button for the format you want and then select the **PRINT** button. Selecting the PDF radio button is the preferred report format option.

Another browser window opens and displays the **Please wait..... page**.

![Please wait page](image)

**Figure 50: Please Wait Page**

Once the report information has been captured, your eIDP displays in the format you requested. The report is identical to the VA Form 4692.
## INDIVIDUAL DEVELOPMENT PLAN

![VA Department of Veterans Affairs logo](TMS)

In order to complete this form, you should obtain a copy of VA Pamphlet 05-67, *Individual Development Planning in the VA*. These pamphlets are stocked at your local facility and at the VA Forms and Publications Depot.

### 1. NAME OF EMPLOYEE
Smith, Mary

### 2. PRESENT POSITION OR TITLE
null / null

### 3. GRADE AND SERIES
null / null

### 4. DATE ASSIGNED
Oct 1, 2015 12:00 AM

### 5. ORGANIZATION AND LOCATION
VALU LEARNING INFRASTRUCTURE

### 6. TELEPHONE NO.
null

### 7. SHORT-TERM CAREER GOALS (1 Year)

<table>
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<tr>
<td>Demonstrates empathy</td>
<td>Engage with colleague to help address problem</td>
<td>11/8/15</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrates empathy</td>
<td>Interpersonal Communication: Demi Ambashable</td>
<td>10/1/15</td>
<td></td>
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</table>

*Assessment Key:
A. Development objective was accomplished
B. Development 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. Development objective not accomplished
E. Development objective no longer applies.

**Figure 51: eIDP Report**
Task 4 – 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 My eIDP Workspace page and select the CREATE eIDP link. Complete the pop-up window for the new eIDP and select the SAVE AND ADD GOAL button.

![Completed Create eIDP Pop-Up Window](image1)

Figure 52: Completed Create eIDP Pop-Up Window

On the Goal Wizard pop-up window, select the ADD GOALS FROM OTHER PLANS radio button.

![Goal Wizard Pop-Up Window with the Add Goals from Other Plans Radio Button Selected](image2)

Figure 53: Goal Wizard Pop-Up Window with the Add Goals from Other Plans Radio Button Selected
Select the **NEXT** button. The Goal Wizard pop-up window displays previous eIDPs from which goals are to be added to the new eIDP.

**Figure 54: Select Plan Area of the Goal Wizard Pop-Up Window**

Select the radio button for the previous eIDP from which goals are to be selected. Select the **NEXT** button.

**Figure 55: Radio Button Selected and Next Button Circled**
The goals from the selected eIDP display.

![Select Goals Table]

**Figure 56: Goals from the Selected eIDP**

Check the boxes for the goals you want to include in the new eIDP. Once that is done, select the **NEXT** button.

![Goal Wizard Screen]

**Figure 57: Goal Details Area of the Goal Wizard Pop-Up Window**

The Goal Wizard screen for the new eIDP displays showing the goal or goals selected from the previous eIDP.
Figure 58: Goal Wizard Screen for the New eIDP

At this point, you continue as described under Task 1 of this job aid to add goals and development activities. Once the new eIDP has been created with all of the relevant information, then it is submitted to your Supervisor for approval.