

Be sure to check the date in the upper right hand corner to n u v а

Notes

# Creating an IDP in AgLearn+ 1411 for Conservation Planners

This job aid will take you through the steps for creating a new IDP, adding goals for Conservation Planner Certification and continuing education, adding activities, and submitting your plan for approval.

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make sure you are using the latest	Step	Activity	View
version of this job aid. Please check to make sure your supervisor is correct	1.	From your AgLearn Home Page, select the <b>IDP Goals</b> status pod. <b>Note:</b> The <b>My Goals Workspace</b> appears.	IDP Goals
in your AgLearn profile before submitting your IDP for approval. Partners/Affiliates should add a supervisor in AgLearn who will	2.	In the upper right corner of the My Goals Workspace, select <b>Create</b> <b>Plan</b> . (Your browser zoom will need to be set to exactly 100%.)	Goal Links Create Plan Add Goal View Published Goals
sign off on their technical requirements.	3.	From the Plan Type drop-down list, select <b>Development</b> .	Create Plan Plan Type Plan Name Description B I U :=
You can also enter a description for your plan, although this is not a required field.	4.	Enter a <b>Plan Name</b> for your IDP.	Create Plan Plan Type  Development Plan Name  FY17/IDP for Jessica Smith Description B I U :=
	5.	Select a plan period that matches the current fiscal year.	Plan Period     Please Select One       Fiscal Year 2017 (9/30/2016 to 9/29/2017)       Save and Add Goal       Save and Add Goal         Save and Add Goal
At this point, your plan is in Draft status, meaning that it has not yet been	6.	Select Save and Add Goal.	Save and Add Goal
submitted to your supervisor.	7.	Enter the level of Conservation Planner Certification you're currently seeking as the <b>Goal Name</b> .	Goal Name * Apprentice Level Conservation Planner Certification
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. (Date should be the end of the current FY.)	Target Date * 9/30/2017 📰 🗐
	9.	Select a <b>Category</b> for your goal. We recommend "Career Development Goals."	Career Development Goals Current Position Goals



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#### Notes

If planners are scheduling to complete the curriculum/ conservation planner-level training over more than a year period, planners should create a second goal for that level of certification for activities to be completed in the next fiscal year, and the target date should be the end of the next fiscal year, and the section would be coded as MID TERM GOAL. If planners are scheduling to complete the curriculum/ conservation planner-level training within a three year period, planners should also create a third goal for that level of certification for activities to be completed in the fiscal year after next, and the section would be coded as LONG TERM GOAL. If planners will be completing more than one curriculum/ conservation planner-level training, they will want to create separate goals for the different levels.

### Creating an IDP in AgLearn+ 1411

10. Select "Short Term Goal" for Section within your goal. Short term goals are goals that have activities that should be completed within the current fiscal year.

11.

Select Save and Close to save your goal and close your goal.



Save and Close



# Adding a Goal 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. The following task will show you how to create a goal activity by searching and using Items in AgLearn. You will want to add all items that must be accomplished in the appropriate fiscal year to complete your Conservation Planner Certification. All the items in the curricula are setup as AgLearn items.

	the cum	cuia are setup as Ayleann items.	
	Step	Activity	View
If you are continuing from step 10, you can skip this step.	1.	From the My Goals Workspace screen, hover over your goal name and select <b>Edit Goal</b> .	od: (Fiscal Year 2017) 9/30/2016 to 9/29/2017 Plan Name Apprentice Level Conservation Planner Certificati © No Value Target Date: 9/30/2017 @ Under Status @ Remove Geal
	2.	Scroll down to the Activities section of your goal.	Créale New Activity
	3.	From the Create New Activity drop down list, select <b>Create Activity</b> using Learning Items.	Create New Activity  Create Activity using Learning Items Create External Activity
	4.	AgLearn courses related to your	the Conservation Planning Course   Exact Phrase  the Conservation Planner Curricula Designation Chart for reference.
If you have already added the course to your AgLearn to-do list, you will see an icon like this next to the item:	5.	From the list of available courses, select the correct course to add as a goal activity.	onservation Planning, Part I
<ul> <li>Conservation Planning, Part I</li> <li>This can help you</li> <li>identify the correct</li> <li>courses.</li> </ul>	6.	Select <b>Add</b> to add the activity to you complete the process again until all	0
To edit or update your activity, hover over the activity title and select <b>Edit/Update</b> .	7.	now listed as your goal activities.	Activities Create New Activity Activity Name Status Target D Introduction to the Field Office Technical Guide 9302017 Conservation Planning, Part I 9302017
	8.	Select Save and Close.	Save and Close



Notes	Addir	ng a Goal and Activities for Continuing Education
	If you ar	re completing your 40 hours of continuing education 3-year cycle towards your cation, please add a goal and activities to your IDP using this method below.
	Step	Activity View
You can skip this step if you're starting from the <b>Save and</b> <b>Add Goal</b> step 6 during intial IDP creation on page 1.	1.	From within your already created IDP, please select to Add Goal. You can use either of the two menus pictured.
An IDP is a living document, so it can be edited at any time to add in goals or activities for continuing education. Your supervisor wil need to reapprove the IDP, however.	2.	Enter the level of Conservation Planner you're recertifying as the Goal Name, and add <b>Recertification</b> at the end of the goal name. Note: You may also wish to enter an optional goal description.
	3.	Enter a <b>Target Date</b> for your goal completion. (Date should be the end of the current FY.)
You can also add a second goal with a target date of the end of the next fiscal year and a section	4.	Select "Short Term Goal" for <b>Section</b> within your goal. Short term goals are goals that have activities that should be completed within the current fiscal year.
of MID TERM GOAL, and add activities you would	5.	Scroll down to the Activities section of your goal. Activities Create New Activity
like to complete in the next fiscal year. You can also add a third goal with a target date of the	6.	From the Create New Activity drop       Create New Activity         down list, select Create Activity       Create Activity using Learning Items         using Learning items.       Create External Activity
end of the fiscal year after next and a section of LONG TERM GOAL, and add activities you would like to	7.	Enter CP Recertification to search for recertification items and click Search. From the list of available courses, select the correct course to add as a goal activity. *Use the Continuing Education Contact Hour Tracking Chart in the policy for reference.
complete two years from now. This will allow you and your	8.	Select <b>Add</b> to add the activity to your goal, and complete the process again until all activities are added.
supervisor to plan ahead for your continuing education hours.	9.	Review the Activities area to confirm the items you intend to complete that year are now listed as your goal activities.
	10.	Select Save and Close to save and exit the goal.



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Notes	Subm	itting Your Plan For Approva	al
	by your	supervisor. This will move your plan from l d, you'll be able to check on who's respon	P, you will be able to submit your plan for approval Draft status to Pending Approval status. Once sible for the next action by selecting <b>View Plan</b>
	Step	Activity	View
	1.	Click Submit for Approval.	View Plan:       Kathy Fallow Fiscal Year 2013 IDP (Draft)         Submit for Approval <ul> <li>Changes to the Plan requires approval</li> </ul>
There is an exception to this rule. See the task titled <b>Recalling an</b> <b>IDP Plan</b> .	2.	Select <b>Yes</b> to confirm your understanding that changes can no longer be made until the plan is approved or rejected.	Submit for Approval Once the plan is submitted for approval, you cannot make any changes till the plan is approved or rejected. Do you wish to continue? Yes No
	3.	Note that the current status of the plan is <b>Pending Approval</b> .	View Plan:       Kathy Fallow Fiscal Year 2013 IDP (Pending Approval)         Recall Plan         Status:       Pending Approval
	4.	Select <b>View Plan Approvals</b> to view the name of the person who must take the next action.	Add/Edit Plan Notes Print Plan View Changes Log View Plan Approvals
There is no Action Date associated with the supervisor, indicating he 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.	Approval Steps     X       Step     Action     Name     Action Date       0     Submitted     Kathy Fallow     4/24/2012       1     Dana King
	6.	Your supervisor will shortly receive an email from AgLearn System instructing him to log in to AgLearn and review and approve your plan.	From: Aglearn System To: King, Dana Subject: Aglearn Plan Review Fallow, Kathy T has submitted a new Plan. This new plan (Dana King FY12 IDP) is for King, Dana and requires your Review and Approval. Please log in to Aglearn and review this plan as soon as possible. Contact your Aglearn System Administrator if you have any questions.
Keep in mind that significant changes requiring approval by the other party must be submitted for approval.	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 System To: Fallow, Kathleen Cc: King, Dana Subject: Aglearn Plan Approved This email is to inform you that your Plan was reviewed and approved by King, Dana on 05/12/2013 12:45 PM America/New York. Your plan is now Active.



## **Recalling a Plan**

Normally, once a plan is submitted for approval, no additional changes should be made to the plan 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 to the plan, you can select Recall Plan to return the plan to you before your supervisor approves it.

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	Step	Activity	View
	1.	From the My Goals Workspace, select the plan you would like to recall. <b>Note:</b> Plans that appear with the phrase <b>(Pending Approval)</b> are eligible for recall.	My Goals Workspace Goal Status Complete (0.00%) Behind (100.00%) View Plan: All Active Plans Coal Name All Active Plans Kathy Fallow Fi2012 IDP (Approved) Kathy Fallow Fi2012 IDP (Approved) Kathy Fallow Fi2012 IDP (Pending Approval)
	2.	Select <b>Recall Plan</b> .	View Plan: Kathy Fallow Fiscal Year 2013 IDP (Pending Approval) •
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.	Recall Plan This action will pull your plan back from the approval process. Do you wish to Continue? Yes No
	4.	Make any goal or activity changes you wish to make, and then select <b>Submit for Approval</b> .	View Plan:       Kathy Fallow Fiscal Year 2013 IDP (Draft)         Submit for Approval       A Changes to the Plan requires approval
At this point the Recall button reappears, 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 <b>Yes</b> to confirm. At this point, make no additional changes until your supervisor approves or rejects your plan.	Submit for Approval Once the plan is submitted for approval, you cannot make any changes till the plan is approved or rejected. Do you wish to continue? Yes No



### Updating the Status of an Activity or Goal

The status of internal activities (those created using AgLearn Courses/Items) will be automatically updated as you complete the training/item. All items for Conservation Planner Certification and continuing education towards recertification are internal activities, so the status will be updated automatically in your IDP when you have completed the items through AgLearn. External activities will need to be updated by you as will the associated goal. External items are only

necessary if you and your supervisor decide you should complete an activity outside the certified conservation planner policy. 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
1.	From the My Goals Workspace, select the plan you would like to update. <b>Note:</b> The plan must be in Approved status. Plans that are in Pending Approval status cannot be edited unless recalled.	My Goals Workspace Goal Status Complete (2.70%) In Progress (0.00%) Behind (97.30%) View Plan: All Active Plans Goal Name All Active Plans My 2012(Development) (Approved)
2.	Hover your mouse over the goal you wish to update and select <b>Update Status</b> .	Description Plan Perio Goal Name Bend Ived like to increase awareness of the technologies available in web content developm Undete Status Edit doal AddDete Status AddDete Status
3.	In the Update Status window, select the activity's new status from the corresponding drop-down list.	Update Status  Goal Name Become more aware of the technologies available in web content development Measure null Status Behind Manually override status  Activities  Activity Name Status  Activity Name Status  Activity Name Completed  Facilitate a Webinar on New Technol In Progress Completed  Save Cancel
4.	Select Save.	Save



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5.	When all goal activities have been completed, you can now update the	Update Status
	status of the goal as Completed. In the	Goal Name Become more aware of the technologies available in web content development
	Update Status window, select	Measure null Status No Value  Manually override status
	Manually override status.	Activities
		Activity Name Status
		Basic Presentation Skills: Creating a P Completed
		Facilitate a Webinar on New Technol Completed
		Save Cancel
6.	From the Status drop-down list, select	Update Status
6.	From the Status drop-down list, select Completed.	
6.	From the Status drop-down list, select <b>Completed</b> .	Update Status Goal Name Become more aware of the technologies available in web content development Measure null
6.		Goal Name Become more aware of the technologies available in web content development Measure null Status No Value ▼ Manually override status
6.		Goal Name Become more aware of the technologies available in web content development Measure null Status No Value  No Value No Value No Value No Value No Value
6.		Goal Name Become more aware of the technologies available in web content development Measure null Status No Value No Value No Value Activities In Progress On Target Status
6.		Goal Name     Become more aware of the technologies available in web content development       Measure     null     Image: Colspan="2">Manually override status       No Value     Image: Colspan="2">Manually override status       Activities     In Progress     On Target       Activity Name     Behind     Status
6.		Goal Name     Become more aware of the technologies available in web content development       Measure     null     Mo Value     Mo Value       Status     No Value     Manually override status       Activities     In Progress       On Target     Banind       Basic Presentati     Anead
6.		Goal Name     Become more aware of the technologies available in web content development       Measure     null     Image: Colspan="2">Manually override status       No Value     Image: Colspan="2">Manually override status       No Value     Image: Colspan="2">Manually override status       Activities     In Progress     Image: Colspan="2">On Target       Behind     Status     Status       Image: Colspan="2">Basic Presentati
5.		Goal Name     Become more aware of the technologies available in web content development       Measure     null     Movalue     Movalue       No Value     Image: Colspan="2">Movalue       Activities     In Progress       On Target     Behind     Status       Basic Presentati     Ahead     Completed
-	Completed.	Goal Name       Become more aware of the technologies available in web content development         Messure       null         Status       No Value         Activities       In Progress         On Target       Behind         Basic Presentati Ahead       Completed         Facilitate a Wet Complete       Completed
-		Goal Name       Become more aware of the technologies available in web content development         Messure       null         Status       No Value         Activities       In Progress         On Target       Behind         Basic Presentati Ahead       Completed         Facilitate a Wet Complete       Completed
7.	Completed. Select Save.	Goal Name Become more aware of the technologies available in web content development Measure null Status No Value  In Progress Activities In Progress Activity Name Benind Basic Presentati Facilitate a We Complete Save Cancel
-	Completed.	Goal Name Become more aware of the technologies available in web content development Measure null Status No Value In Progress Activities In Progress Activity Name Benind Basic Presentati Ahead Completed Facilitizate a Wet Complete Completed Save Cancel