

**Notes**

Be sure to check the date in the upper right hand corner to make sure you are using the latest version of this job aid.

Please check to make sure your supervisor is correct in your AgLearn profile before submitting your IDP for approval. Partners/Affiliates should add a supervisor in AgLearn who will sign off on their technical requirements.

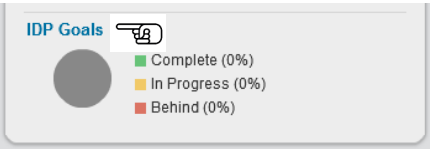

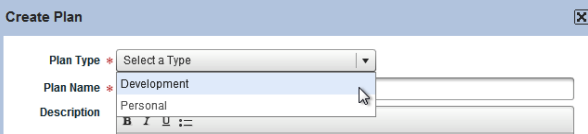
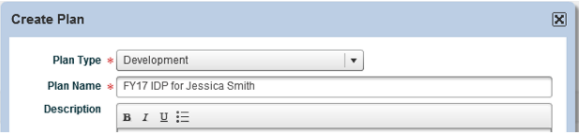
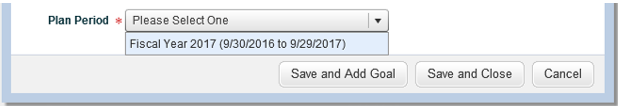
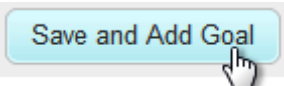


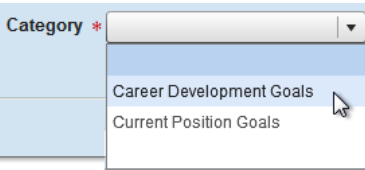
You can also enter a description for your plan, although this is not a required field.

At this point, your plan is in Draft status, meaning that it has not yet been submitted to your supervisor.

You may also wish to enter an optional goal description.

## 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.

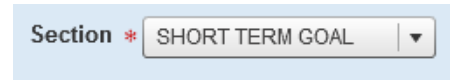
Step	Activity	View
1.	From your AgLearn Home Page, select the <b>IDP Goals</b> status pod. <b>Note:</b> The <b>My Goals Workspace</b> appears.	
2.	In the upper right corner of the My Goals Workspace, select <b>Create Plan</b> . (Your browser zoom will need to be set to exactly 100%.)	
3.	From the Plan Type drop-down list, select <b>Development</b> .	
4.	Enter a <b>Plan Name</b> for your IDP.	
5.	Select a plan period that matches the current fiscal year.	
6.	Select <b>Save and Add Goal</b> .	
7.	Enter the level of Conservation Planner Certification you're currently seeking as the <b>Goal Name</b> .	
8.	Select the calendar icon to enter a <b>Target Date</b> for your goal. (Date should be the end of the current FY.)	
9.	Select a <b>Category</b> for your goal. We recommend "Career Development Goals."	

**Notes**

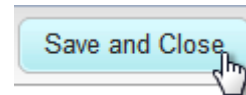
If planners are scheduling to complete the curriculum/conservation planner-level training over more than a year period, planners should create a second goal for that level of certification for activities to be completed in the next fiscal year, and the target date should be the end of the next fiscal 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.



Notes

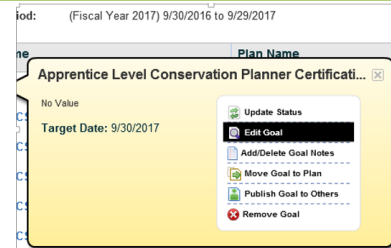
## Adding a Goal Activity Using AgLearn Items

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.

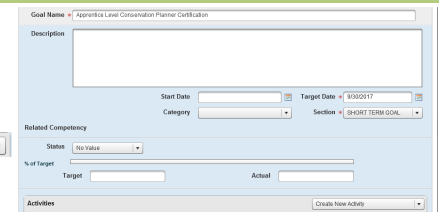
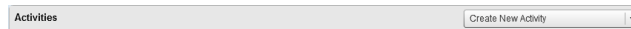
Step	Activity	View
------	----------	------

If you are continuing from step 10, you can skip this step.

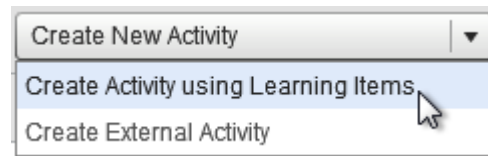
1. From the My Goals Workspace screen, hover over your goal name and select **Edit Goal**.



2. Scroll down to the Activities section of your goal.



3. From the Create New Activity drop down list, select **Create Activity using Learning Items**.



4. Enter a phrase to search for AgLearn courses related to your goal and click **Search**.




\*Use the Conservation Planner Curricula Designation Chart for reference.

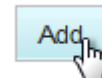
If you have already added the course to your AgLearn to-do list, you will see an icon like this next to the item:

5. From the list of available courses, select the correct course to add as a goal activity.



 Conservation Planning, Part I  
This can help you identify the correct courses.

6. Select **Add** to add the activity to your goal, and complete the process again until all activities are added.

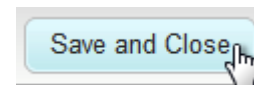


7. Review the Activities area to confirm your curriculum items are now listed as your goal activities.



To edit or update your activity, hover over the activity title and select **Edit/Update**.

8. Select **Save and Close**.



Notes

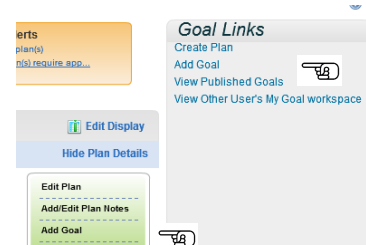
## Adding a Goal and Activities for Continuing Education

If you are completing your 40 hours of continuing education 3-year cycle towards your recertification, 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 **Save and Add Goal** step 6 during initial IDP creation on page 1.

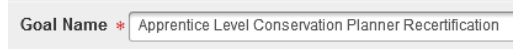
1. From within your already created IDP, please select to **Add Goal**. You can use either of the two menus pictured.



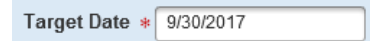
An IDP is a living document, so it can be edited at any time to add in goals or activities for continuing education. Your supervisor will need to reapprove the IDP, however.

2. Enter the level of Conservation Planner you're recertifying as the Goal Name, and add **Recertification** at the end of the goal name.

Note: You may also wish to enter an optional goal description.



3. Enter a **Target Date** for your goal completion. (Date should be the end of the current FY.)

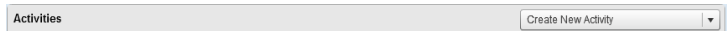


You can also add a second goal with a target date of the end of the next fiscal year and a section of MID TERM GOAL, and add activities you would like to complete in the next fiscal year. You can also add a third goal with a target date of the end of the fiscal year after next and a section of LONG TERM GOAL, and add activities you would like to complete two years from now. This will allow you and your supervisor to plan ahead for your continuing education hours.

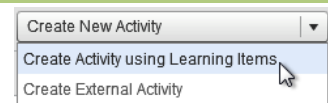
4. Select "Short Term Goal" for **Section** within your goal. Short term goals are goals that have activities that should be completed within the current fiscal year.



5. Scroll down to the **Activities** section of your goal.

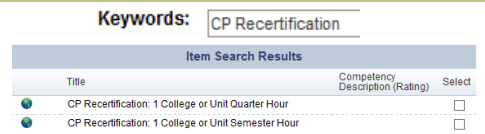


6. From the Create New Activity drop down list, select **Create Activity using Learning items**.



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.

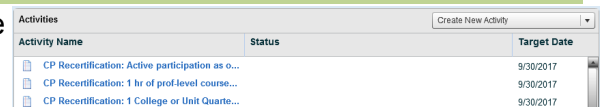
\*Use the Continuing Education Contact Hour Tracking Chart in the policy for reference.



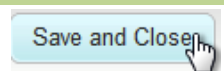
8. Select **Add** to add the activity to your goal, and complete the process again until all activities are added.



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.



Notes

## Submitting Your Plan For Approval

Once you have added at least one goal to your IDP, you will be able to submit your plan for approval by your supervisor. This will move your plan from Draft status to Pending Approval status. Once submitted, you'll be able to check on who's responsible for the next action by selecting **View Plan Approvals**.

Step	Activity	View
------	----------	------

1.	Click <b>Submit for Approval</b> .	
----	------------------------------------	--

There is an exception to this rule. See the task titled **Recalling an IDP Plan**.

2.	Select <b>Yes</b> to confirm your understanding that changes can no longer be made until the plan is approved or rejected.	
----	--	--

3.	Note that the current status of the plan is <b>Pending Approval</b> .	
----	---	--

4.	Select <b>View Plan Approvals</b> to view the name of the person who must take the next action.	
----	---	--

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.	<table border="1"> <thead> <tr> <th>Step ...</th> <th>Action</th> <th>Name</th> <th>Action Date</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>Submitted</td> <td>Kathy Fallow</td> <td>4/24/2012</td> </tr> <tr> <td>1</td> <td></td> <td>Dana King</td> <td></td> </tr> </tbody> </table>	Step ...	Action	Name	Action Date	0	Submitted	Kathy Fallow	4/24/2012	1		Dana King	
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.	
----	--	--


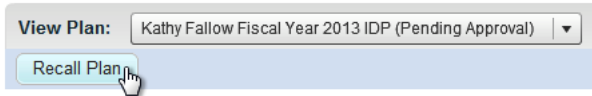
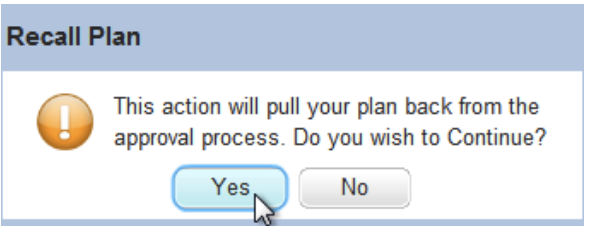
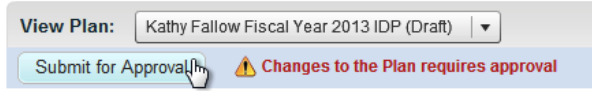
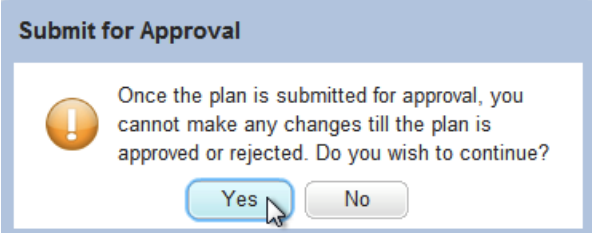
Keep in mind that significant changes requiring approval by the other party must be submitted for approval.

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.	
----	---	--

Notes

**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.

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.	
2.	Select <b>Recall Plan</b> .	
3.	Select Yes to confirm you understand and wish to continue the process.	
4.	Make any goal or activity changes you wish to make, and then select <b>Submit for Approval</b> .	
5.	Select <b>Yes</b> to confirm. At this point, make no additional changes until your supervisor approves or rejects your plan.	

Once you select Yes, your plan will change back to Draft status and the Recall button will change to a Submit for Approval button.

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.

## 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.

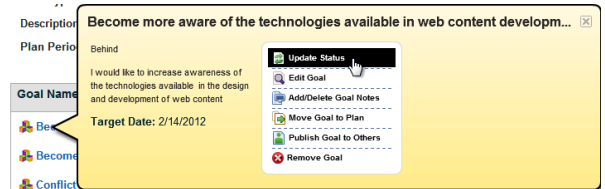
Step	Activity	View
------	----------	------

- From the My Goals Workspace, select the plan you would like to update.  
  
**Note:** The plan must be in Approved status. Plans that are in Pending Approval status cannot be edited unless recalled.

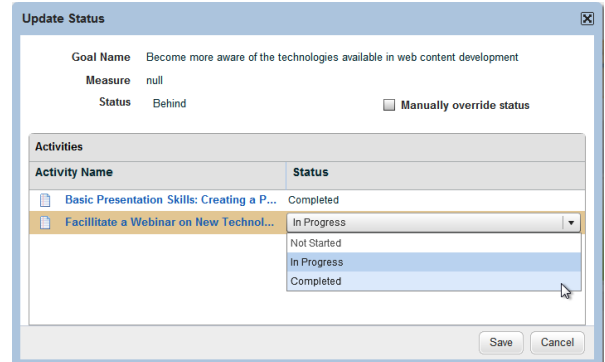
### My Goals Workspace



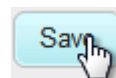
- Hover your mouse over the goal you wish to update and select **Update Status**.



- In the Update Status window, select the activity's new status from the corresponding drop-down list.



- Select **Save**.





## Updating the Status of an Activity or Goal

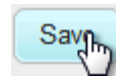
- When all goal activities have been completed, you can now update the status of the goal as Completed. In the Update Status window, select **Manually override status**.

Activity Name	Status
Basic Presentation Skills: Creating a P...	Completed
Facillitate a Webinar on New Technol...	Completed

- From the Status drop-down list, select **Completed**.

Activity Name	Status
Basic Presentati...	Ahead
Facillitate a Wel...	Complete

- Select **Save**.



- In the My Goals Workspace, your goal status now shows as **Complete**.

Goal Name	Plan Name	Plan Status	Target Date	Goal Status
Become more aware of L...	My 2012(Development)	Approved	2/14/2012	Complete
Become more proficient L...	My 2012(Development)	Approved	3/15/2012	Behind