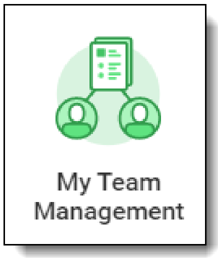
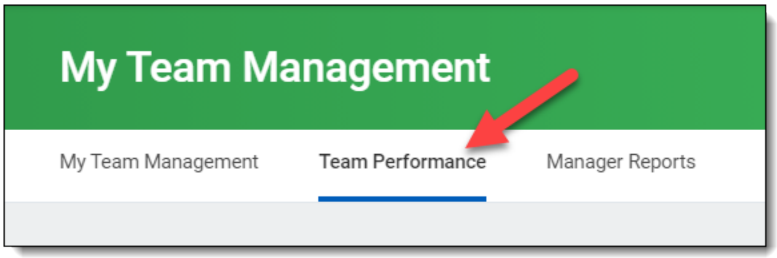
Starting a Development Plan

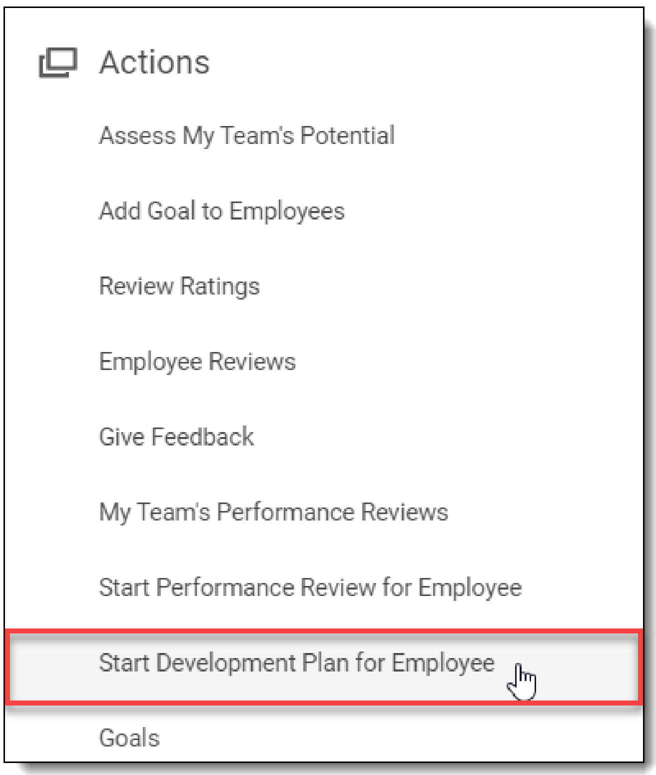
This job aid will walk you step by step on how to start a development plan for your employee.

Step 1: On the *Home* page, click the **My Team Management** worklet, then click on the Team Performance tab.





Step 2: From the *Actions* menu, click **Start Development Plan**.

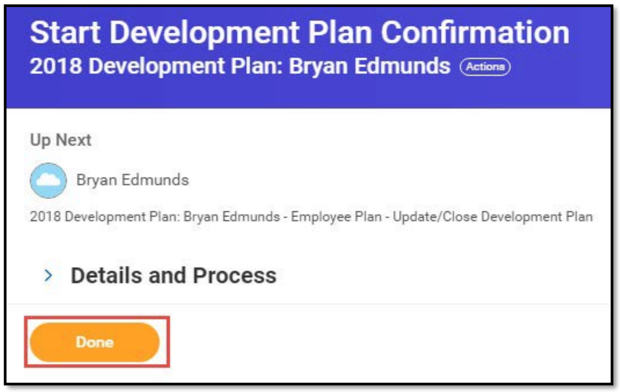


Step 3: Complete the following fields.

1. In the *Employee* field, select the employee for the development plan by clicking the drop down menu or entering a name.
2. In the *Review Template* field, click on **Development Plan** and then select the **Current Year's Development Plan** template**.**

3. In the *Period Start Date* field, select the start date for the development plan from the calendar or simply enter it.
4. In the *Period End Date* field, select the end date for the development plan from the calendar or simply enter it.
5. Click **Submit**.

Step 4: A confirmation that the development plan has been started will be displayed. Click **Done**.

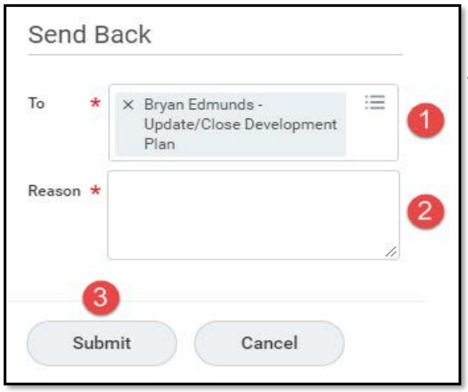


Step 5: Once the employee has completed the employee version of the development plan, you will receive an inbox item to review/modify/approve the plan.

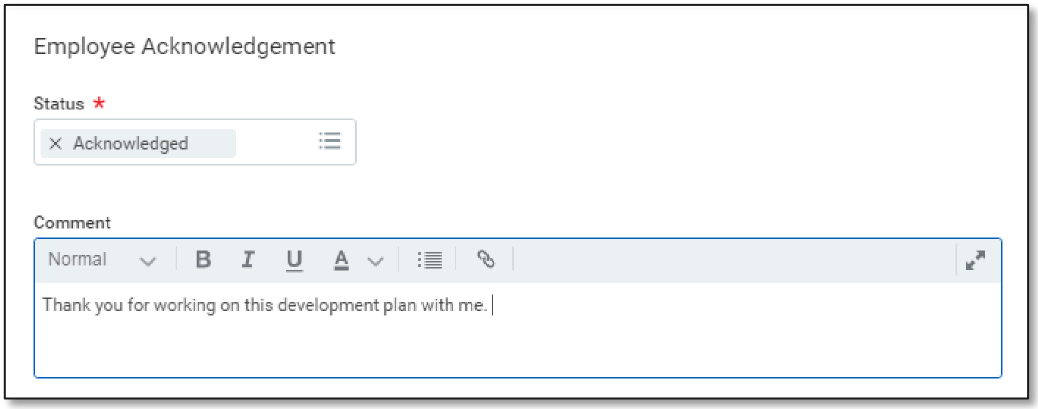
Step 6: You can view, and edit if needed, the development plan your employee created. You will have the option to take one of the following actions:

1. **Submit**, this will approve the employee's development plan with any of the Manager's changes (if any).
2. **Send Back**, this will send the development plan back to the employee with your comments.
3. **Save for Later,** this will keep any edits you made, and keep the plan in your inbox.
4. **Close,** this will return the development plan to your inbox, discarding any edits you made.

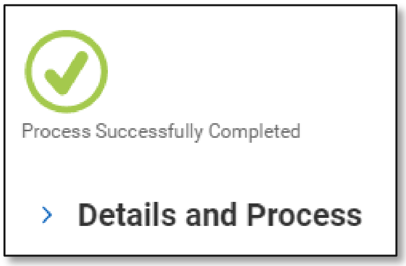
Step 7: If you select **Send Back**, a pop-up window will display and you will need to complete the following fields:



1. In the *To* field, verify it is the correct employee.
2. In the *Reason* field, type in the reason you are sending it back to the employee.
3. Click **Submit**. A notification will be sent to the employee and they can make changes to the development plan based on your comments and resubmit it.



Step 8: After the manager completes the final submit step, the employee will receive an *Employee Acknowledgement* step in their inbox.



Once the employee submits their acknowledgement, they will see the *Process Successfully Completed* visual.