

**Quick Reference Guide**

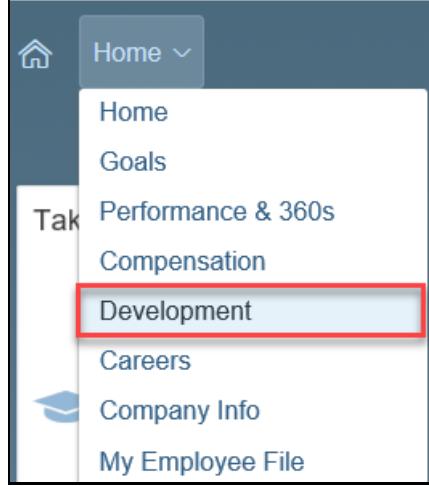
**Individual Development Plan for Staff and Supervisors – Last updated 1/31/19**

Use this QRG to create an Individual Development Plan (IDP) for the current plan year. This plan is for your developmental use only. It is not routed to your manager for review or linked to your annual performance assessment. Managers can access the IDP of their direct reports to facilitate discussion.

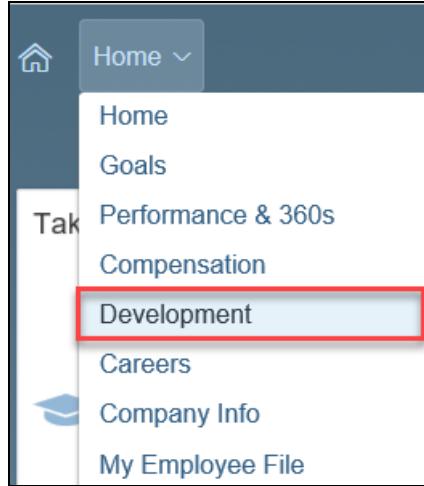
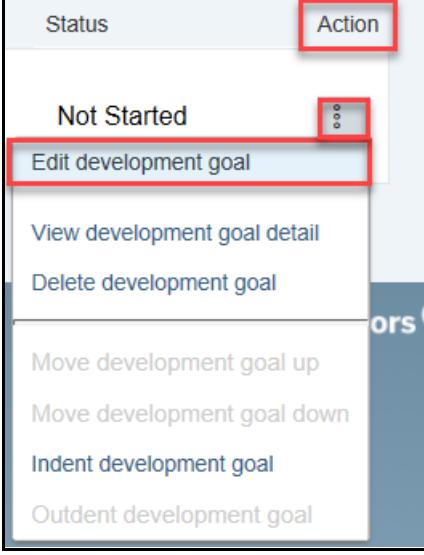
Hyperlinks:

[Intro to Accessing SuccessFactors](#)

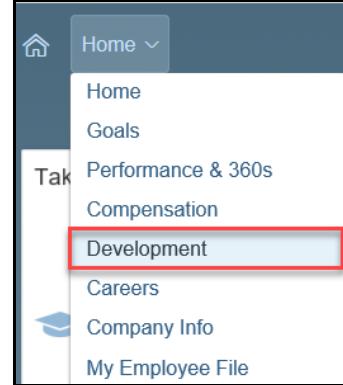
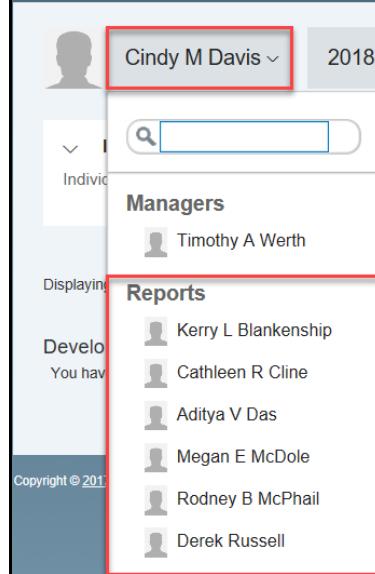
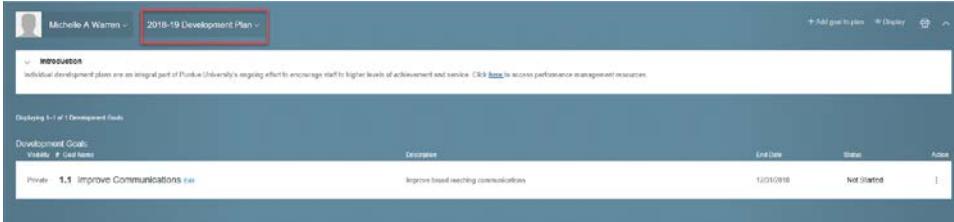
[Intro to Creating a Development Plan](#)

<b>Access SuccessFactors</b>	
<b>Add a Goal to Plan</b>	
Click on <b>Home Menu</b> at top of screen and select <b>Development</b>	
The <b>Development</b> dashboard displays.  Click <b>Add goal</b> in the upper right corner.	

<p>Enter a <b>Goal Name</b> (required) and <b>Description</b> (required).</p> <p>Select one or more <b>Competencies</b> (optional).</p> <p><b>Spell check</b> and <b>legal scan</b> are available.</p>	<p>Add Development Goal</p> <p>Fields marked with * are required.</p> <p>Visibility: Private</p> <p>* Goal Name: <input type="text"/></p> <p>spell check... legal scan...</p> <p>Competencies:</p> <p><input checked="" type="checkbox"/> Communications  <input type="checkbox"/> Continuous Improvement / Change Management  <input type="checkbox"/> Culture and Values  <input type="checkbox"/> Customer Service / Service Orientation  <input type="checkbox"/> Decision Making / Problem Solving  <input type="checkbox"/> Dependability  <input type="checkbox"/> Job Performance  <input type="checkbox"/> Professional / Career Development</p> <p>Add Competencies</p> <p>* Description: <input type="text"/></p> <p>spell check... legal scan...</p> <p>Cancel Save &amp; Close</p>
<p>Scroll down.</p> <p>Enter the <b>Start Date</b> (required) and <b>End Date</b> (required).</p> <p>Enter the <b>Status</b> (required).</p> <p>Click <b>Save &amp; Close</b>.</p>	<p>* Start Date: 01/01/2018</p> <p>* End Date: 12/31/2018</p> <p>* Status: Not Started</p> <p>Cancel Save &amp; Close</p>

Edit a Goal	
<p>After a development goal is added, you can maintain the goal throughout the performance plan year. Click on <b>Home Menu</b> at top of screen and select <b>Development</b></p>	
<p>To edit a goal there are two options from the <b>Development</b> dashboard.</p> <p>Option 1 – Click <b>Edit</b> next to the name of the desired <b>Development Goal</b>.</p>	<div style="border: 1px solid black; padding: 10px; text-align: center;"> <p>1.1 Improve Communications </p> </div>
<p>Option 2 – Click  below <b>Actions</b> and select <b>Edit development goal</b>.</p> <p>(Note: Changes and additions are saved automatically.)</p>	

View an Individual Development Plan for Direct Reports – For Managers Only

<p>Navigate to <b>Development</b>.</p>	
<p>Click on your name.</p> <p>The names of your direct reports will appear on the screen.</p> <p>Click on an employee's name to view their development plan dashboard.</p>	
<p>The selected employee's <b>Development Plan</b> dashboard displays.</p>	
<p><i>Helpful Hint:</i> To access development plans for other direct reports, click the name of the active direct report; a search field displays.</p> <p>Enter the name of another direct report.</p> <p>Click the name below the search box.</p>	