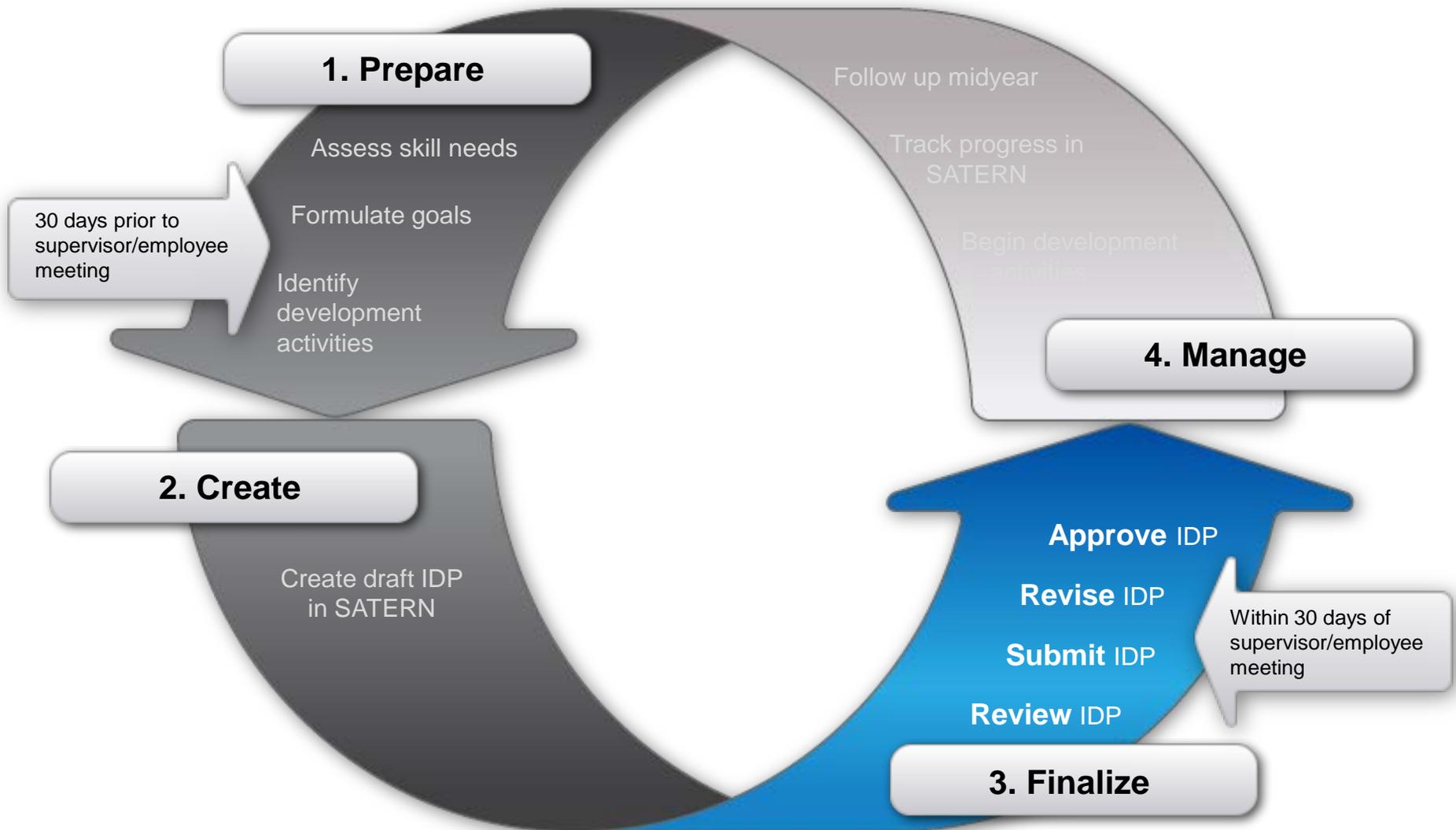


Module 4

Phase 3: Finalize Your IDP

IDP Finalize Phase



Finalize Your IDP

- This module will review all of the activities involved in managing your IDP.
- At the end of this module, you will be able to:
 - View Your IDP
 - Print Your IDP
 - Check Notes From Your Coach or Mentor (Optional)
 - Verify With Your Supervisor
 - Make Edits to Your IDP
 - Submit Your IDP
 - Respond to a rejected IDP

View Your IDP

You have options to customize the display of your IDP.

- To view your IDP, navigate to the Learner tab and click the **Individual Development Plan(s)** link in the Easy Links section
- Alternatively, you will find the **IDP Goals Pod** on the Learner tab, under the Easy Links section.
- Your IDP workspace will display:

The screenshot displays the SATERN learner interface. At the top is a search bar labeled 'Catalog'. Below it is the 'Easy Links' section, which contains a grid of links: 'Advanced Catalog Search', 'Approvals', 'Books 24x7', 'Calendar of Scheduled Offerings', 'External Requests (SE-182)', 'Individual Development Plan(s)', 'Options and Settings', 'Record Learning', 'Reports', 'SATERN Guides & Aids', and 'Talent Profile'. The 'Individual Development Plan(s)' link is circled in red. Below the links are four pods: 'Curricula' (with a red circle and legend for Overdue (1), Due in 30 days (0), and Due Later (0)), 'Learning History' (with a blue checkmark and text '1 item completed in the last 30 days.'), 'Competencies' (with a grey key icon and text 'No assigned competencies'), and 'IDP Goals' (with a red circle and legend for Complete (0%), In Progress (0%), and Behind (100%)). The 'IDP Goals' pod is also circled in red.

View Your IDP (cont.)

On the My IDPs Workspace you will see options for **Select IDP** and **Edit Display**.

My IDPs Workspace

Goal Status

- Complete (0.00%)
- In Progress (0.00%)
- Behind (100.00%)

IDP Alerts
You have rejected IDP(s)
Changes to the IDP(s) require appr...

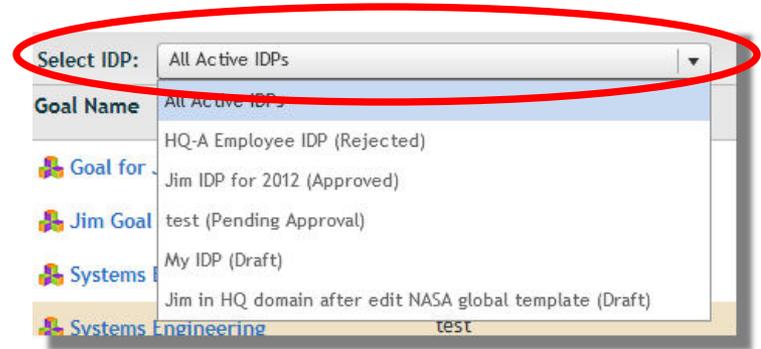
Select IDP: All Active IDPs

Goal Name	IDP Name	IDP Status	Target Date
Goal for Jim DOES use right tem...	HQ-A Employee IDP	Rejected	5/31/2012
Jim Goal A for 2012	Jim IDP for 2012	Approved	7/31/2012

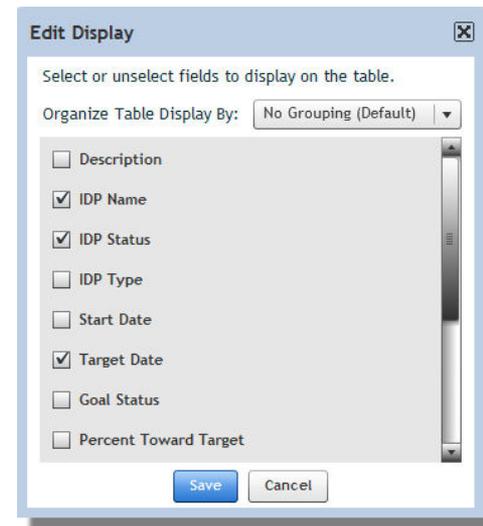
Edit Display

View Your IDP (cont.)

- The **Select IDP** drop-down menu allows you to choose which IDP you would like to view.



- Edit Display** allows you to select the fields to display on the IDP Workspace.



Print Your IDP

- If you want to review your IDP with a paper copy or an electronic file (e.g., Adobe PDF), you can print your draft IDP in SATERN.
 - The printout of your draft IDP will include all notes and comments added to your plan.
- To print your draft IDP, select the specific IDP from the **Select IDP** dropdown and click **Print IDP**.

The screenshot displays the SATERN IDP management interface. At the top, a dropdown menu labeled 'Select IDP:' is set to 'My IDP (Draft)'. A red circle highlights this dropdown, with a yellow circle containing the number '1' next to it. A green box with the text 'Select a specific IDP' points to the dropdown. Below the dropdown is a blue 'Submit for Approval' button and a red warning message: 'Changes to the IDP requires approval'. A progress bar shows three steps: 'Create IDP', 'Create Goals', and 'Submit for Approval'. The 'Submit for Approval' step is currently active. On the right side, there is a menu with several options: 'Edit IDP', 'Add/Edit IDP Notes', 'Add Goal', 'Print IDP', 'View Changes Log', and 'Delete IDP'. A red circle highlights the 'Print IDP' option, with a yellow circle containing the number '2' next to it. A green box with the text 'Click Print IDP.' points to this option. The main content area shows the IDP details: Status: Draft, IDP Type: Development, and IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013.

Print Your IDP (cont.)

- Your draft plan report will look something like this:
- Print or create an electronic file as you would any other document from your browser.

SATERN Individual Development Plan (IDP)

Learner

Learner ID : C-jsmitchell4
Learner Name : MITCHELL, JAMES S

IDP

IDP Name : Training Development IDP Period : PY 2013 - 1 Year
IDP Type : Development Effective Date : 5/1/2012 12:00 AM EST
Description : Expiration Date : 4/30/2013 12:00 AM EST
IDP Status : Pending Approval

100%



0%

0%

■ Behind

■ Complete

■ In Progress

IDP Notes

Notes	Description	Author	Date
Please add more activities to your goal.		MYERS, JENNIFER F	8/8/2012 03:36 PM EST

IDPs

Goal Name : Training Development Goal Status : No Value
Category : Target Date : 1/4/2013 01:00 AM EST
Related Competency : Start Date :
Section : Measure :
Supporting : Actual Value : 0
Priority : Target Value :
Goal Weight : Stretch Value :
Percent Toward Target (%) : 0.00

Description :

Activities

Activity	Type	Target Date	Priority	Status	Actual	Target	Complete (%)
ISD course	External	1/4/2013 01:00 AM EST		In Progress			0.00

Your IDP always prints in a standard format, regardless of your display customizations.

Check Notes From Your Coach or Mentor

- If you selected a coach or mentor for your plan, he or she will be able to view your IDP in SATERN at any point.
- You should discuss and agree on the following with your coach or mentor:
 - **Feedback Format:** How should feedback be provided?
 - Note comments in the online IDP tool
 - Write comments on a printed draft
 - Hold in-person meeting or phone conference
 - **Timeline:** When is the feedback expected?
 - The date that the draft IDP will be ready for review
 - The target date for mentor comments

Check Notes From Your Coach or Mentor (cont.)

- SATERN does not provide email notifications or alerts to your coach or mentor that your IDP is ready for review.
 - You and your coach or mentor should agree on how you will notify him or her when your draft IDP is ready for review.
- However, you will receive an e-mail notifying you that your coach or mentor has made comments:

IDP Note Notification

NASA-Satern64@nasa.gov [NASA-Satern64@nasa.gov]

Sent: Friday, June 22, 2012 5:03 AM
To: Mitchell, James S. (HQ-LEO50)[IBM GLOBAL SERVICES FEDERAL]

This email is to inform you that LOWERY, MEREDITH (Coach) **has added a note to your IDP, My IDP.**

The details follow:

IDP: My IDP

Goal: Systems Engineering

Activity:

Note:

This is a test goal

This is a notification-only e-mail. Please do not reply.

For SATERN assistance, contact the NSSC Contact Center at 877-NSSC-123 (877-677-2123) or send an e-mail to NASA-satern.support@nasa.gov. Support hours are 8 a.m. - 8 p.m. ET Monday - Friday.

| [Log into SATERN](#) | [SATERN Info Site](#) |

Check Notes From Your Coach or Mentor (cont.)

- If you print your IDP, all notes made on your IDP will appear on the printout.
- If you choose to view your IDP online, there are several places to check for notes from your coach or mentor in your IDP.
 - There is nothing to indicate if an IDP contains a note, so unless you have received an e-mail notification, you should check the IDP notes.
 - On the IDP Workspace page for a particular IDP, select **Add/Edit IDP Notes**.



The screenshot shows the IDP Workspace interface. At the top, there is a dropdown menu for 'Select IDP:' with 'My IDP (Draft)' selected. Below this is a 'Submit for Approval' button and a warning icon with the text 'Changes to the IDP requires approval'. The main workspace has three tabs: 'Create IDP', 'Create Goals', and 'Submit for Approval'. On the left, there is a summary of the IDP: Status: Draft, IDP Type: Development, Description: (Performance Year 2013 (1 Year)), and IDP Period: 5/1/2012 to 4/30/2013. On the right, there is a 'Hide IDP Details' link and a menu with options: 'Edit IDP', 'Add/Edit IDP Notes', 'Add Goal', 'Print IDP', 'View Changes Log', and 'Delete IDP'. The 'Add/Edit IDP Notes' option is circled in red. A green callout box with the text 'Click Add/Edit IDP Notes.' points to this option.

Check Notes From Your Coach or Mentor (cont.)

- The **Edit Goals** and **Edit Activities** sections of your IDP will also have an option for notes.
- These sections will show an indicator (📄) when a note has been added.

Edit Goal

My IDP (Development)

Goal Name * Systems Engineering

Description

Goal Notes

Indicates a note has been added.

Click to View/Edit Notes.

Edit Activity

Activity Name * Job Aid Creation

Activity Type External

Activity Notes

Click to View/Edit Notes.

Check Notes From Your Coach or Mentor (cont.)

- Any comments will be listed under **Notes Log** and will contain your reviewer's name and the date and time the review occurred.
- Anyone adding a comment will see all other comments that have been made.

The screenshot shows a 'Goal Notes' window with a text input field for adding a note, a 'Private note' checkbox, and a 'Notes Log' table. The table has three columns: Name, Date, and Time. One entry is circled in red.

Notes Log		
MEREDITH LO...	6/21/2012	12:28 PM
This is a test goal note.		

Check Notes From Your Coach or Mentor (cont.)

The screenshot shows a 'Goal Notes' window with a text input area, a 'Private note' checkbox, an 'Add' button, a 'Notes Log' table, and 'Done' and 'Cancel' buttons. A red oval highlights the text input area. A green box labeled 'Click Add.' points to the 'Add' button, which is also circled in red and labeled with a '1'. A green box labeled 'Click Done.' points to the 'Done' button, which is also circled in red and labeled with a '2'.

Goal Notes

Type below and click Add to add a note to a single Learner.

Private note (for yourself only)

Click Add.

1

Notes Log

Name	Date	Time	Note
MEREDITH LO...	6/21/2012	12:28 PM	This is a test goal note.

Click Done.

2

Done Cancel

You can also add notes of your own.

- If, for example, you revised your plan based on comments received, you can document the changes you made to your plan and how you addressed your reviewer's concerns before final submission.

Checking **Private note (for yourself only)** will ensure that your coach or mentor and supervisor cannot view your notes, but they are recorded in the system and are not truly “private.”

Check Notes From Your Coach or Mentor (cont.)

You must click **Save and Close** for your changes to save properly.

My IDP (Development) Goal Notes

Goal Name * System Engineering

Description

Priority Start Date Target Date * 6/28/2013

Section

Status No Value

Target Actual

Activities Create New Activity

Activity Name	Status	Target Date
---------------	--------	-------------

Click **Save and Close**.

Check Notes From Your Coach or Mentor (cont.)

Let us quickly review:

- You checked for comments in the **Notes** section of your printed IDP.
- You checked for comments by viewing your IDP and checking the **Notes** sections of your IDPs, goals, and activities.

Verification With Your Supervisor

Prior to submitting your IDP:

- Contact your supervisor to let him or her know you would like to discuss your draft.
 - This can be a formal or informal meeting. The purpose is to review your draft plan with your supervisor and receive/integrate feedback prior to submission.
 - You may want to print a copy or e-mail an Adobe PDF file of your IDP to review during this meeting.

Verification With Your Supervisor

- Check to ensure that you have the correct Supervisor indicated in SATERN by returning to the **Learner** tab and clicking on your name in the Learner Card

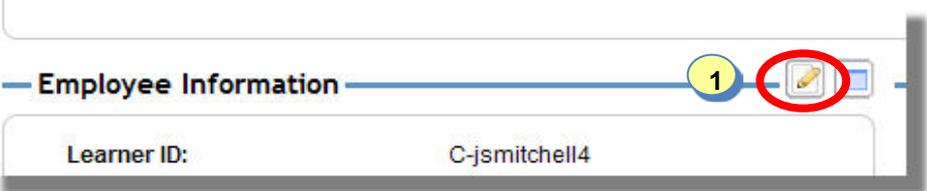


Verification With Your Supervisor (cont.)

If the supervisor listed is not correct:

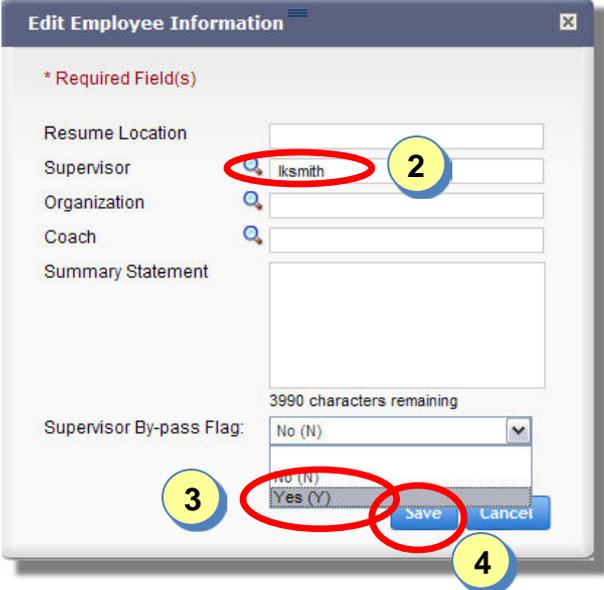
1. Click the pencil icon () in the Employee Information section.
2. Browse to search for and select your supervisor.
3. Set the **Supervisor By-pass Flag** to **Y (Yes)**.
4. Click **Save**.

Only set the **Supervisor By-pass Flag** to **Yes (Y)** if you have changed your supervisor. In addition, before changing your supervisor, be sure any old IDPs have been approved to avoid routing errors.



Employee Information 1 

Learner ID: C-jsmitchell4



Edit Employee Information

* Required Field(s)

Resume Location

Supervisor 2

Organization

Coach

Summary Statement

3990 characters remaining

Supervisor By-pass Flag: 3

No (N) Yes (Y) 4

Make Edits to Your IDP

- At this point in the process, you have reviewed comments from your coach or mentor (if applicable), and you have talked with your supervisor about your draft IDP.
- You may now wish to make final edits to your IDP before submitting it to your supervisor for approval.
- To make edits to your plan, click **Edit IDP** on the IDP Workspace.

The screenshot shows the IDP Workspace interface. At the top, there is a dropdown menu for 'Select IDP:' with 'My IDP (Draft)' selected. Below this is a blue bar with a 'Submit for Approval' button and a warning icon with the text 'Changes to the IDP requires approval'. A progress bar below the blue bar shows three steps: 'Create IDP', 'Create Goals', and 'Submit for Approval', with 'Submit for Approval' being the current step. On the right side, there is a 'Click **Edit IDP**.' callout box. Below this, a menu is visible with the 'Edit IDP' option circled in red. Other options in the menu include 'Add/Edit IDP Notes', 'Add Goal', 'Print IDP', 'View Changes Log', and 'Delete IDP'. At the bottom left, there is a table with the following information:

Status:	Draft
IDP Type:	Development
Description:	
IDP Period:	(Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

You can only edit the **IDP Name**, **Description** and **IDP Period** using **Edit IDP**.

Make Edits to Your IDP (cont.)

- To delete a goal or an activity, from your IDP workspace, hover your mouse over the title of the goal or activity and click **Remove Goal/Activity**.

IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

Goal Name	IDP Name
 Systems Engineering	
No Value	
Target Date: 8/24/2012	

- Update Status
- Edit Goal
- Add/Delete Goal Notes
- Move Goal to IDP
- Publish Goal to Others
- Remove Goal**

Click **Remove Goal** (or Activity).

Submit Your IDP

- Once you have discussed your plan with your supervisor and integrated any comments, you are ready to submit your IDP for approval.

Select IDP: My IDP (Draft)

Submit for Approval ⚠ Changes to the IDP requires approval

Create IDP

Click **Submit for Approval**.

Status: Draft

IDP Type: Development

Description: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

Goal Name	IDP Name
Systems Engineering	My IDP

You need to have *at least one Goal for each IDP* to submit your IDP for approval.

Submit Your IDP (cont.)

- Your screen will now show that your IDP Status is now Pending Approval.

My IDPs Workspace

Goal Status

- Complete (0.00%)
- In Progress (0.00%)
- Behind (100.00%)

Select IDP: My IDP (Pending Approval)

Recall IDP

Status: Pending Approval

IDP Type: Development

Description:

IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

Goal Name	IDP Name	IDP Status
Systems Engineering	My IDP	Pending Approval

Submit Your IDP (cont.)

- If you need to make changes to your IDP prior to approval, click **Recall IDP**.

My IDPs Workspace

Goal Status

- Complete (0.00%)
- In Progress (0.00%)
- Behind (100.00%)

Select IDP: My IDP (Pending Approval) ▼

Recall IDP

Status: Pending Approval

IDP Type: Development

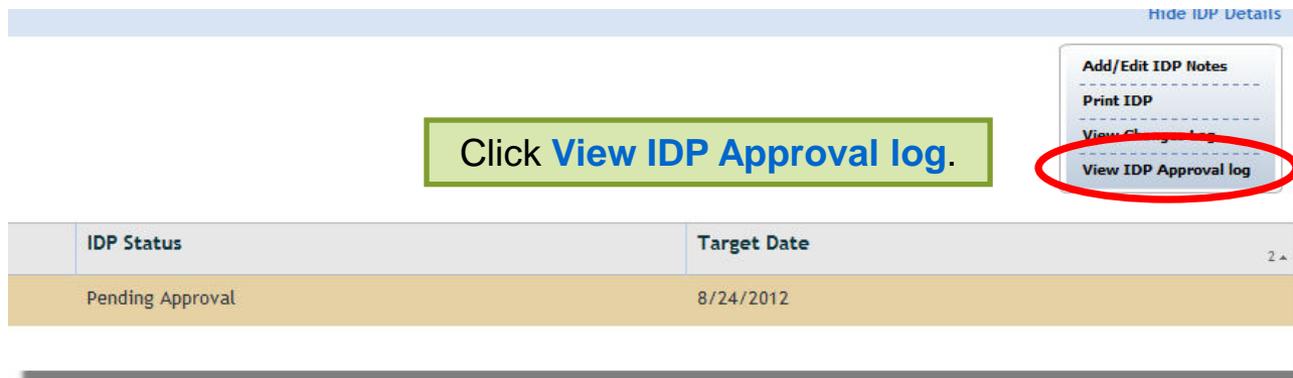
Description:

IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

Goal Name	IDP Name	IDP Status
Systems Engineering	My IDP	Pending Approval

Submit Your IDP (cont.)

- Click [View IDP Approval log](#) to see status of your draft IDP:



Hide IDP Details

Add/Edit IDP Notes
Print IDP
View IDP Approval log
View IDP Approval log

Click [View IDP Approval log](#).

IDP Status	Target Date
Pending Approval	8/24/2012

Step ...	Action	Name	Action Date
0	Submitted	James S Mitchell	6/25/2012
1		JENNIFER F MYERS	

Submit Your IDP (cont.)

- Your supervisor will be notified by email that there is an IDP awaiting approval:

From: NASA-Satern64@nasa.gov [mailto:NASA-Satern64@nasa.gov]
Sent: Monday, June 25, 2012 11:59 AM
To: Myers, Jennifer F. (HQ-LE000)[IBM GLOBAL SERVICES FEDERAL]
Subject: IDP Review

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National Aeronautics and
Space Administration



Mitchell, James S **has submitted a new Plan. This new plan, My IDP, is for Mitchell, James S and requires your Review and Approval. Please log in to SATERN and review this IDP as soon as possible. Contact your employee if you have any questions.**

This is a notification-only e-mail. Please do not reply.

For SATERN assistance, contact the NSSC Contact Center at 877-NSSC-123 (877-677-2123) or send an e-mail to NASA-satern.support@nasa.gov. Support hours are 8 a.m. - 8 p.m. ET Monday - Friday.

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Submit Your IDP (cont.)

Once your IDP has been approved, three things will happen:

1. You will receive an email notifying you that your IDP has been approved and is active:

From: NASA-Satern64@nasa.gov
To: Mitchell, James S. (HQ-LE050)[IBM GLOBAL SERVICES FEDERAL]
Cc:
Subject: IDP Approved

SATERN

System for Administration, Training, and Educational Resources for NASA

National Aeronautics and
Space Administration



**This email is to inform you that your IDP,
My IDP,
has been activated on 5/1/2012 01:00 AM America/New York.**

**This is a notification-only e-mail. Please do not reply.
For SATERN assistance, contact the NSSC Contact Center at 877-NSSC-123 (877-677-2123) or
send an e-mail to NASA-satern.support@nasa.gov. Support hours are 8 a.m. - 8 p.m. ET Monday -
Friday.**

[| Log into SATERN |](#) [SATERN Info Site |](#)

Submit Your IDP (cont.)

- Your Learning Plan will automatically update with any SATERN Learning Items included in your IDP with a due date.

The screenshot displays the SATERN Learning Plan for user James S Mitchell. The interface is organized into sections based on the due date of the learning items:

- Overdue:**
 - 48 days overdue: METHODS FOR TESTING SURVEY QUESTIONS (Must be registered)
- Due later:**
 - 8/1/2012: Introduction to Project Management using Project 2010 (In progress)
 - 8/24/2012: NPR 7123.1A NASA SYSTEMS ENGINEERING PROCESSES AND... (Must be registered) - **Highlighted with a red circle**
- No due date:**
 - DIRECTIVE MANAGEMENT TRAINING (Available)
 - LDC GSFC SH EAT Course (In progress)

Submit Your IDP (cont.)

3. Your IDP Plan Status will be updated.

My IDPs Workspace

Goal Status

- Complete (0.00%)
- In Progress (0.00%)
- Behind (100.00%)

Select IDP: **My IDP (Approved)**

Status: Approved

IDP Type: Development

Description:

IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

Goal Name	IDP Name	IDP Status
Systems Engineering	My IDP	Approved

Submit Your IDP (cont.)

If your IDP is denied, three things will happen:

1. You will receive an email notifying you that your IDP has been rejected:

From: NASA-Satern64@nasa.gov
To: Mitchell, James S. (HQ-LEO50)[IBM GLOBAL SERVICES FEDERAL]
Cc:
Subject: IDP Rejected

SATERN

System for Administration, Training, and Educational Resources for NASA

National Aeronautics and
Space Administration



This email is to inform you that your IDP, My IDP, for Mitchell, James S was reviewed, but rejected by MYERS, JENNIFER F on 6/25/2012 02:19 PM America/New York. Please log in to the system to review the comments from MYERS, JENNIFER F. You may modify the IDP and re-submit it for approval at any time.

This is a notification-only e-mail. Please do not reply.
For SATERN assistance, contact the NSSC Contact Center at 877-NSSC-123 (877-677-2123) or send an e-mail to NASA-satern.support@nasa.gov. Support hours are 8 a.m. - 8 p.m. ET Monday - Friday.

| [Log into SATERN](#) | [SATERN Info Site](#) |

Submit Your IDP (cont.)

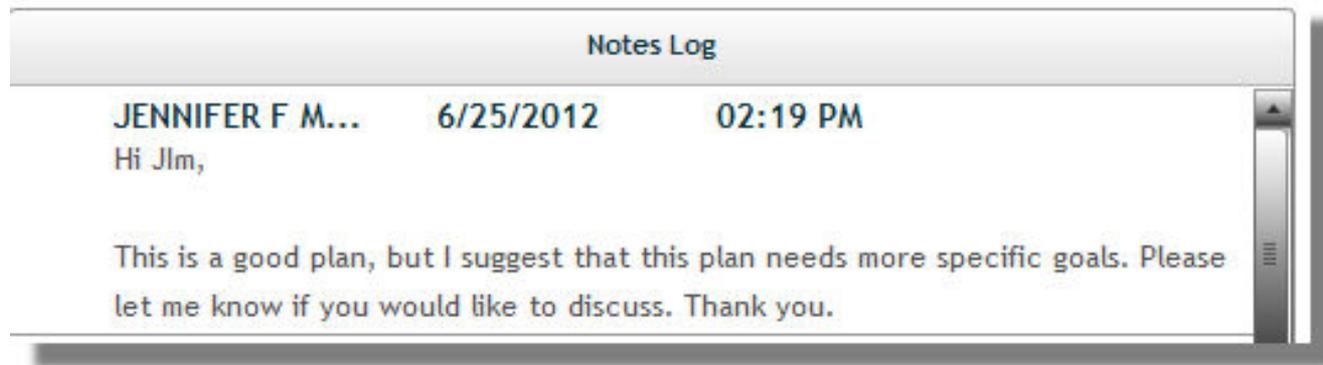
- Your IDP Status will be listed as Rejected. To view the reason for the rejection, click [Add/Edit IDP Notes](#) to see what guidance your supervisor is giving you.

The screenshot displays the SATERN IDP system interface. At the top, a dropdown menu shows 'My IDP (Rejected)'. Below it, a progress bar indicates the current step is 'Submit for Approval'. The main content area shows the IDP details: Status: Rejected, IDP Type: Development, Description: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013. A table below lists the IDP with columns for Goal Name, IDP Name, IDP Status, and Target Date. The 'My IDP' entry shows a status of 'Rejected'. A green callout box points to the 'Add/Edit IDP Notes' button in the right-hand menu.

Goal Name	IDP Name	IDP Status	Target Date
Systems Engineering	My IDP	Rejected	8/24/2012

Submit Your IDP (cont.)

When you click Add/Edit IDP Notes, your supervisor's comments will display in the Notes Log:



Submit Your IDP (cont.)

- Once you have considered your supervisor's comments, you can edit or add new goals or activities before resubmitting your IDP for approval.

Select IDP: My IDP (Draft)

Submit for Approval ⚠ Changes to the IDP requires approval

Create IDP

Status: Draft

IDP Type: Development

Description:

IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

Goal Name	IDP Name
Systems Engineering	My IDP

Summary

Before submitting your IDP, remember to:

- Check notes from your coach or mentor (if applicable).
- Discuss your draft with your supervisor.
 - You may want to print or e-mail your draft IDP for your discussion.
- Make any necessary edits and notes you would like to add.
- Verify your supervisor in SATERN and make a change, if needed.

IDP Flow Chart

