

Module 3

Finalize Phase Responsibilities

What Is Your Role in the Finalize Phase?

- After the employee has created a draft IDP in SATERN, one of the supervisor's primary responsibilities is to review and approve the IDP.
- This module will cover the following tasks:
 - Reviewing a Draft IDP with the Employee
 - Recognizing IDP Submissions for Approval
 - Selecting an IDP for Review
 - Viewing Plan Details
 - Making Comments
 - Denying an IDP
 - Approving an IDP

Review a Draft IDP with the Employee

- The first step involved in finalizing an IDP is to meet with the employee to review the draft IDP before it is submitted for your approval.
- The purpose of this meeting is to:
 - Ensure that the supervisor and employee are in agreement regarding specific goals and development activities
 - Provide the employee with an opportunity to ask questions or seek clarification
 - Discuss any relevant topics that may not have been raised in the initial supervisor meeting
 - Offer suggestions for further ways to reach the employee's goals

Recognize IDP Submissions for Approval

- When an employee submits an IDP for your review, you will receive an email notification. The email will be from NASA-satern@nasa.gov and the subject line will read: **IDP Review**
- The email will instruct you to log into SATERN to review the IDP.

IDP Review

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

Sent: Thursday, June 28, 2012 4:37 PM

To: Mitchell, James S. (HQ-LEO50) [IBM GLOBAL SERVICES FEDERAL]

Attachments:  SATERN Banner_100909.jpg (13 KB)

SATERN

System for Administration, Training, and Educational Resources for NASA

National Aeronautics and
Space Administration



LOWERY, MEREDITH has submitted a new Plan. This new plan, Test IDP For Jim on 6/28, is for LOWERY, MEREDITH 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.

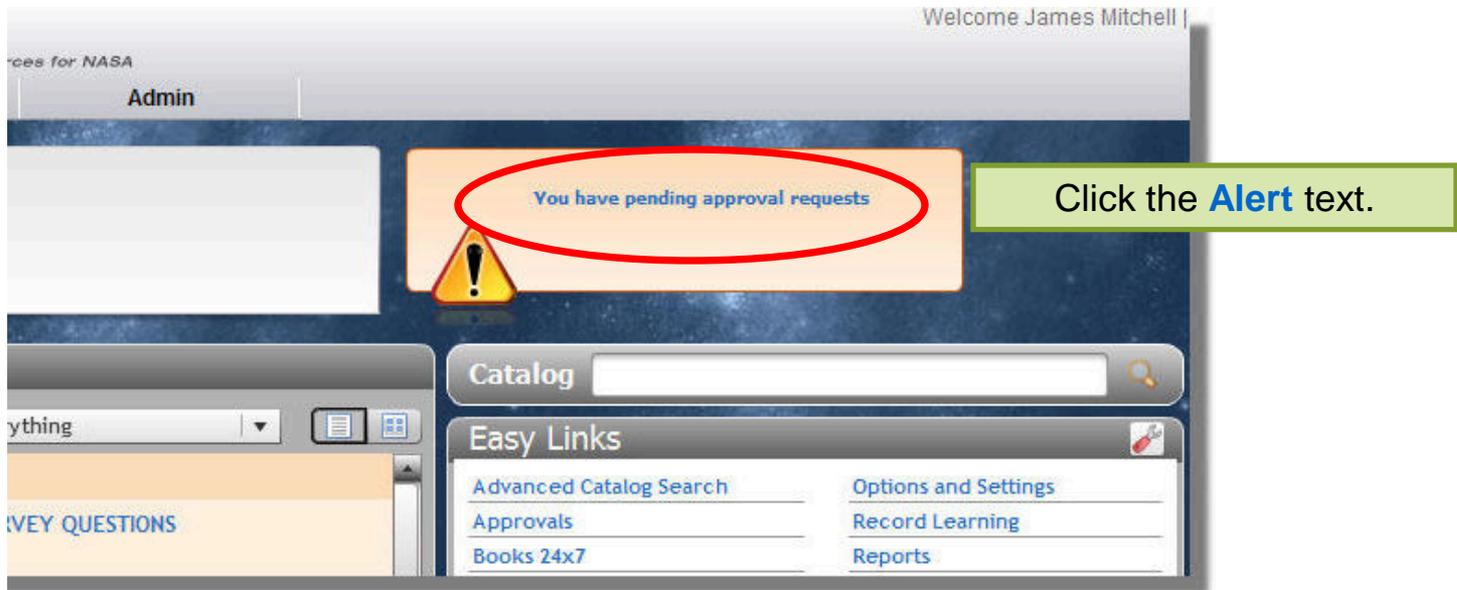
This is a notification-only e-mail. Please do not reply.

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.

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

Select an IDP for Review

- When you log into SATERN, you will see an **Alert** that you have a pending approval request.
- Click this link to be directed to a list of all items awaiting your review and approval.



The screenshot displays the SATERN user interface. At the top right, it says "Welcome James Mitchell |". Below this, there is a navigation bar with "Admin" and "Services for NASA". A prominent orange alert box with a yellow warning icon contains the text "You have pending approval requests". A red oval highlights this text. To the right of the alert box, a green callout box contains the text "Click the **Alert** text." Below the alert box, there is a search bar labeled "Catalog" and a section titled "Easy Links" with several menu items: "Advanced Catalog Search", "Options and Settings", "Approvals", "Record Learning", "Books 24x7", and "Reports".

Select an IDP for Review (cont.)

- Select the **Performance Management** tab.

Pending Reviews and Approvals [Help](#)

This view shows you all of the review and approval actions you have been asked to perform. It is divided into two primary sections: reviews and approvals for performance management Activities, such as competency assessments (only if available); and approvals for training requests. You may switch between sections by clicking on the appropriate section header. Within each section you will find a list of specific reviews or approvals you are being asked to perform, categorized by activity type.

Performance Management (1) Training (0)

Performance Management

▼ **Rater Approvals (0)**

There are no Learners that need rater approval.

▼ **Review Assessment Results (0)**

There are no assessments that require your review.

▼ **Subordinate IDP Approvals (1)**

Review Subordinate

Learner Name	IDP Name	IDP Period	IDP Status ▲	Effective Date	Approval Date	Expiration Date	Review Type	Action
LOWERY, MEREDITH	Test IDP For Jim on 6/28	PY 2013 - 1 Year	Pending Approval	5/1/2012		4/30/2013	New Plan	Review

Select **Performance Management**.

Select an IDP for Review (cont.)

- Choose the Plan you wish to review.
- Clicking **Review** brings you into the employee's Plan in the View/Add Notes mode. Before moving forward to review the IDP, be sure to orient yourself.

Pending Reviews and Approvals [Help](#)

This view shows you all of the review and approval actions you have been asked to perform. It is divided into two primary sections: reviews and approvals for performance management Activities, such as competency assessments (only if available); and approvals for training requests. You may switch between sections by clicking on the appropriate section header. Within each section you will find a list of specific reviews or approvals you are being asked to perform, categorized by action type.

Performance Management (1) **Training (0)**

Performance Management

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Review Subordinate

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LOWERY, MEREDITH	Test IDP For Jim on 6/28	PY 2013 - 1 Year	Pending Approval	5/1/2012		4/30/2013	New Plan	Review

Click **Review**.

Select an IDP for Review (cont.)

- You can confirm that you are viewing the intended Plan at the top of the page, below Supervisor Approval of IDPs.
 - If you need to return to your own records, click the **Learner** tab.
 - If you need to return to other employees Plans, click the **My Employees** tab.

Supervisor Approval of IDPs

Training Development for **MEREDITH LOWERY** [Edit Display](#)

[Approve](#) [Deny](#) [Hide IDP Details](#)

Status: Pending Approval

IDP Type: Development

Description:

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

[Add/Edit IDP Notes](#)

[Print IDP](#)

[View Changes Log](#)

[View IDP Approval log](#)

Goal Name	IDP Name	IDP Status	Target Date	Goal Status
Training Developm...	Training Development	Pending Approval	1/4/2013	No Value

View Plan Details

To view the development activities listed under each Goal, click the Goal Name.

Supervisor Approval of IDPs

Training Development for MEREDITH LOWERY Edit Display

Approve Deny Hide IDP Details

Status: Pending Approval

IDP Type: Development

Description:

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

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

Goal Name	IDP Name	IDP Status	Target Date	Goal Status
 Training Developm...	Training Development	Pending Approval	1/4/2013	 No Value

Click the Goal Name.

View Plan Details (cont.)

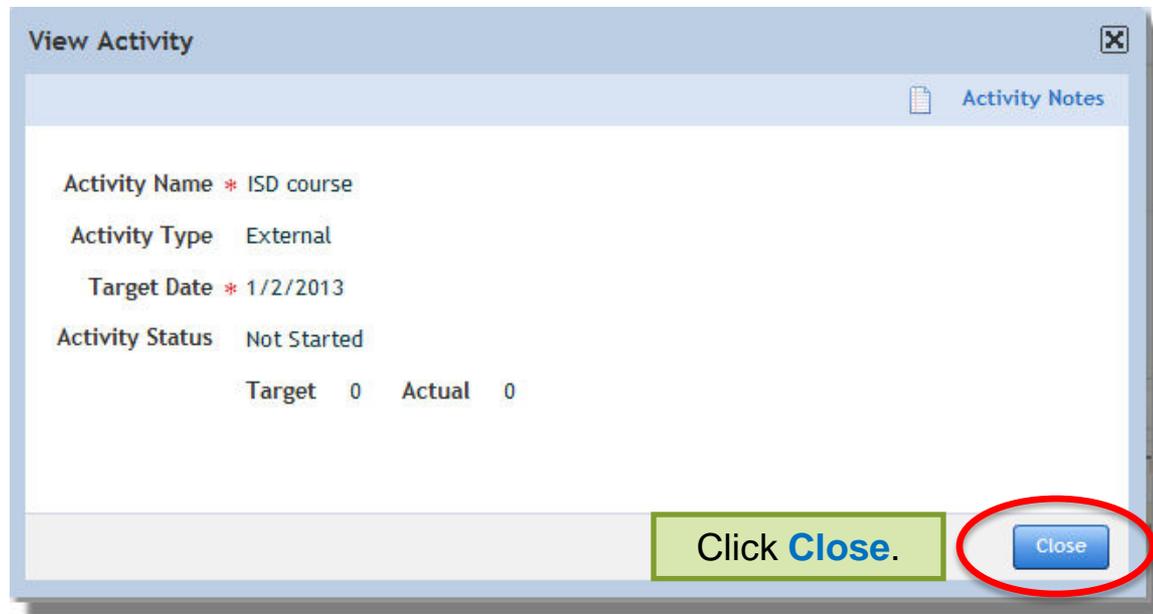
To view Activity details, from the **View Goal** screen, click the Activity Name.

The screenshot shows a 'View Goal' window for 'Training Development (Development)'. The goal name is 'Training Development'. The description field is empty. The priority is 'No Value', the start date is '1/4/2013', and the target date is '1/2/2013'. The status is 'Not Started'. The activities table has one row: 'ISD course' with status 'Not Started' and target date '1/2/2013'. A red circle highlights the 'ISD course' activity name, and a green box with the text 'Click the Activity Name.' points to it.

Activity Name	Status	Target Date
ISD course	Not Started	1/2/2013

View Plan Details (cont.)

After viewing the Activity details, click **Close**.



Make Comments

Once you have viewed the IDP, you may add comments to the overall IDP, and/or to Goals and Activities.

- To add notes to the overall IDP - from the Supervisor Approval of IDP workspace click [Add/Edit IDP Notes](#)

Supervisor Approval of IDPs

Training Development for MEREDITH LOWERY Edit Display

[Approve](#) [Deny](#) Hide IDP Details

Status: Pending Approval Click [Add/Edit IDP Notes](#).

IDP Type: Development

Description:

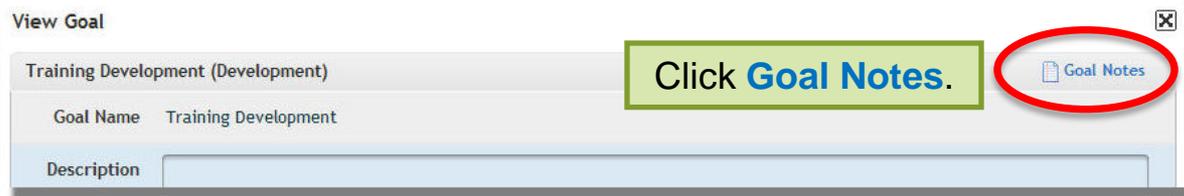
IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

- [Add/Edit IDP Notes](#)
- [Print IDP](#)
- [View Changes Log](#)
- [View IDP Approval log](#)

Goal Name	IDP Name	IDP Status	Target Date	Goal Status
Training Developm...	Training Development	Pending Approval	1/4/2013	No Value

Make Comments (cont.)

- To add notes to a Goal - from the **View Goal** screen, click **Goal Notes**



- To add notes to an Activity - from the **View Activity** screen, click **Activity Notes**



Make Comments (cont.)

- The Notes Log allows you to view any comments that have already been added.
- Notes can be made by the employee, supervisor, or by a coach/mentor. To add your comments, type the text in the box provided and click **Add**.
- If you choose not to add notes, you can exit by clicking **Cancel** at the bottom of the screen.
- If you wish to remove the note, click the Delete(✖) icon
- Once you are finished, click **Done**.

The screenshot shows the 'Goal Notes' window. At the top, it says 'Type below and click Add to add a note to a single Learner.' Below this is a text input area with a green box containing 'Enter comments.' and a toolbar with icons for bold, italic, underline, and list. A checkbox labeled 'Private note (for yourself only)' is present, with a green box containing 'Click Add.' and a yellow circle with the number '1' next to it. The 'Add' button is circled in red. Below the input area is a 'Notes Log' section with a green box containing 'View comments.' It displays a note by James S Mitchell dated 6/26/2012 at 11:43 AM with the text 'This is a good goal'. At the bottom, there is a green box containing 'Click Done.' and a yellow circle with the number '2' next to it. The 'Done' button is circled in red, and the 'Cancel' button is also visible.

Checking **Private note (for yourself only)** will ensure that others with access to this Plan cannot view your notes (including your employee), but they are recorded in the system are not truly “private.”

Deny an IDP

- If, after reviewing, there are further changes that need to be made (e.g., a course you discussed with the employee was not included in the Plan), you can **Deny** (or reject) the IDP.
- The employee will have the opportunity to revise the Plan and resubmit.

Supervisor Approval of IDPs

Training Development for MEREDITH LOWERY Edit Display

Click **Deny**. Hide IDP Details

Status: Pending Approval

IDP Type: Development

Description:

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

[Add/Edit IDP Notes](#)

[Print IDP](#)

[View Changes Log](#)

[View IDP Approval log](#)

Goal Name	IDP Name	IDP Status	Target Date	Goal Status
Training Developm...	Training Development	Pending Approval	1/4/2013	No Value

Deny an IDP (cont.)

- If you choose to deny (reject) a Plan, you are required to provide comments regarding the reason for the rejection.
- To enter your comments, type your text into the box provided.
 - Comments should be specific enough to guide employee revisions.
 - Once complete, click **Submit**.
- An email notifying the employee of the rejection will be sent automatically.
- The employee will then be able to modify the Plan and resubmit.

Deny Comment *(Required)

You must add notes using the area provided to continue rejection of the IDP.

B I U ☰

Meredith, It may be prudent to add more goals.

1 Enter comment.

2 Click **Submit**.

Submit Cancel

Approve an IDP

- If you have reviewed the draft IDP and agree with the proposed goals and development activities, click **Approve**.
 - You may approve an IDP the first time it is submitted, or you may approve the document after an initial rejection (once revisions have been made and the Plan has been resubmitted for approval).

Supervisor Approval of IDPs

Training Development for MEREDITH LOWERY

[Approve](#) [Deny](#) [Click Approve.](#) [Edit Display](#) [Hide IDP Details](#)

Status: Pending Approval

IDP Type: Development

Description:

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

[Add/Edit IDP Notes](#)
[Print IDP](#)
[View Changes Log](#)
[View IDP Approval log](#)

Goal Name	IDP Name	IDP Status	Target Date	Goal Status
Training Developm...	Training Development	Pending Approval	1/4/2013	No Value

Approve an IDP (cont.)

- The **Plan Status** will now read **Active/Approved**.
- The employee will receive an email indicating that the IDP has been approved.
- On the IDP's **Effective Date**, the employee will receive a second email indicating that the IDP is active.
- Once you have approved the Plan, you can exit the employee's Plan.
 - To do this, click the **Learner** tab to return to your own records, or the **My Employees** tab to review other employee Plans.