

Module 4

Manage Phase Responsibilities

What Is Your Role in the Manage Phase?

- After the IDP has been approved and activated in SATERN, the Manage phase begins.
- Your responsibilities during this phase include:
 - Supporting the employee's training and development
 - Monitoring progress of development activities
- This module will cover the following tasks:
 - Supporting Training & Development Activities
 - Running Employee Reports
 - Meeting with the Employee to Review Progress

Support Training & Development Activities

- Now that the IDP is approved, both the employee and the supervisor will implement the Plan.
- The employee will begin to schedule and complete the activities outlined in the Plan.
- However, the employee may encounter problems with accomplishing developmental goals, or need your guidance in executing the Plan.

Support Training & Development Activities (cont.)

- Ways you can offer support:
 - Provide access to resources (e.g., funding, mentors, etc.)
 - Approve enrollment requests for academic classes, conferences, and training courses, submitted through SATERN
 - Help the employee with the nomination or registration processes
 - Assist the employee in developing an action plan for developmental assignments or on-the-job training
 - Get involved before and after training to maximize the employee's developmental experience

Run Employee Reports

- As a supervisor, you can run reports in SATERN that will help you monitor the progress the employee has made toward IDP Goals and to see what learning activities have been completed.
 - You may find it helpful to print and review employee reports in preparation for supervisor-employee meetings where you discuss the IDP.
- SATERN allows you to generate a number of different standard reports. All reports have the same options to describe how you wish to run the report.

Tip: You must be viewing your own records in order to access all reporting options.

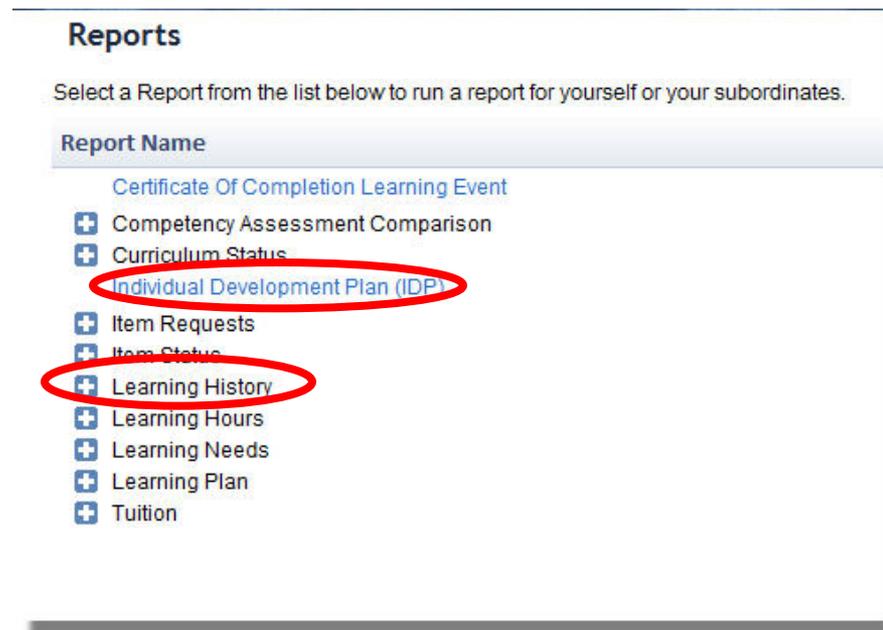
Run Employee Reports (cont.)

To run a report, select **Reports** from the Easy Links section of your own Learner tab.

The screenshot displays the SATERN user interface for a learner named James S Mitchell. At the top, the NASA logo and 'SATERN System for Administration, Training, and Educational Resources for NASA' are visible, along with 'Welcome JAMES MITCHELL | Sign Out'. Below the header, the user's name 'JAMES S MITCHELL' is shown in a white box. A warning message states 'Your Talent Profile is Incomplete'. The main content area features a 'Learning Plan' on the left and an 'Easy Links' section on the right. The 'Easy Links' section contains a grid of links: 'Advanced Catalog Search', 'Approvals', 'Individual Development Plan(s)', 'Options and Settings', 'Record Learning', 'Reports', 'SATERN Guides and Aids', and 'Talent Profile'. The 'Reports' link is circled in red. A green callout box with the text 'Select Reports.' points to this link. Below the 'Easy Links' section are two summary cards: 'Curricula' (All required Curricula are complete.) and 'Learning History' (No completions in the last 30 days.).

Run Employee Reports (cont.)

- There are two SATERN reports that directly relate to monitoring IDP progress:
 - IDP
 - Learning History



Run Employee Reports (cont.)

- After you select a report, you will have a choice of running a report for yourself, your direct reports, all in your chain of command, or all.
- You also have a number of choices regarding report display options including Report Title, Header and Footer details, and Report Format.

Reports [Help](#)

[Back to Browse Reports](#)

Run Learning History Combined

Learner: Self Direct Subordinates All Subordinates All

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Page Break Between Records

Completed Date From:

Completed Date To:

Report Type: Summary Detail

Print Comments: Yes No

Sort Items: Completion Date Item ID

Run Employee Reports (cont.)

- After your selections, click [Run Report](#).

Reports Help

[Back to Browse Reports](#)

Run Learning History Combined

Learner: Self Direct Subordinates All Subordinates All

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Mask Learner IDs

Page Break Between Records

Completed Date From:

Completed Date To:

Report Type: Summary Detail

Print Comments: Yes No

Sort Items: Completion Date Item ID

Click [Run Report](#).

Run Employee Reports (cont.)

- The IDP report includes data on:
 - Goals
 - Development Activities
 - Notes
 - Progress made toward Goals and Activities

Learner ID : *****
Learner Name : BLAHUT, ELLEN A

IDP

IDP Name : Ellen's Development Plan through Spring 2012
 IDP Type : Development
 Description : This plan provides information for Ellen's development through Spring 2012.

Period : PY 2011 - 1 Year
 Effective Date : 4/30/2011 01:00 AM America/New York
 Expiration Date : 4/29/2012 01:00 AM America/New York
 IDP Status : Approved



IDP Notes

Notes Description	Author	Date
TEST UAT DENY	SCHOSSOW, CRYSTAL C	4/4/2012 11:17 AM America/New York

IDPs

Goal Name : Completely recover from knee surgery.
 Category :
 Related Competency :
 Section : SHORT-RANGE GOALS: 1 YEAR
 Supporting :
 Priority : 2 - MEDIUM

Status : In Progress
 Target Date : 4/30/2012 01:00 AM America/New York
 Start Date : 3/1/2012 01:00 AM America/New York
 Measure :
 Actual Value : 0

Percent Toward Target (%) : 0.00

Description : After knee surgery, get back to my pre-surgery fitness level. Have started working out on the spinning bike and elliptical. Nice job!!

Activities

Activity	Type	Target Date	Priority	Status	Actual	Target	Complete(%)
INSIDE SALES SKILLS SIMULATION	Item	4/30/2012 01:00 AM America/New York		Available			0.00
Operations Management: Management of Item Quality	Item	4/30/2012 01:00 AM America/New York		Available			0.00

Run Employee Reports (cont.)

- The Learning History report includes data on:
 - Completed catalog items
 - External development activities completed and recorded by the learner
 - External development activities completed via the SF-182

Learner					
Learner ID :	*****	Name :	BLAHUT, ELLEN A		
Item Events					
Item ID	Title	Completion Date	Grade	Status	
SMA-BEATLES-SINGALONG-SP		May 10, 2012 3:40 PM		Completed	
SMA-002-07	OVERVIEW OF MISHAP INVESTIGATIONS	Apr 11, 2012 4:05 PM		Completed	
NSSC-TEST		Apr 3, 2012 5:00 PM	p	Completed	
	The Beatles - The Untold Stories	Apr 3, 2012 1:00 AM	A+		
SMA-017-01	FMEA/CIL	Apr 2, 2012 4:05 AM		Substitute	
SMA-017-02		Apr 2, 2012 4:05 AM		Completed	
NSSC-TEST		Mar 29, 2012 6:00 PM		Completed	

The report displays in a new browser window.
You can print the reports as you would any other document.

Run Employee Reports (cont.)

- If you need to run a report for only one employee, navigate to the My Employees tab and hover your mouse over the employee name
- Select **Reports** from the actions list

The screenshot displays the SATERN system interface. At the top, the NASA logo is on the left, and the text 'SATERN System for Administration, Training, and Educational Resources for NASA' is in the center. Below this, there are three tabs: 'Learner', 'My Employees' (which is selected and highlighted in blue), and 'Admin'. The main content area is titled 'Employees' and shows a list of employee names with warning icons: MEREDITH LOWERY, SHARI A HOWER, JOSEPH A ABATE, and ELLEN A BLAHUT. A yellow hover menu is open over MEREDITH LOWERY, listing several actions: Record Learning, Reports (circled in red), External Requests (SF-182), Profile, Send Message, and Options & Settings. A green callout box with the text 'Click Reports.' points to the 'Reports' option.

Meet with the Employee to Review Progress

- The IDP is designed to be a realistic working plan and may change over time as priorities and needs change.
- The IDP should be reviewed periodically to ensure that the activities continue to be current and worthwhile in supporting the intended objectives and goals.
- You should meet with the employee to follow up on IDP progress.

Meet with the Employee to Review Progress (cont.)

- During this meeting the you can:
 - Discuss the employee's progress toward goals and confirm that progress is being recorded in SATERN
 - Evaluate the effectiveness of the training and determine if the development activities are meeting development needs
 - Provide advice on any changes or mid-term adjustments that may be necessary
 - Agree on modifications to the IDP and when they will be made

When an employee revises his/her IDP by adding or removing goals or activities, the IDP will be re-submitted to you for approval.

Summary

- The IDP is tool that can be used to discuss career goals, career development, and expertise development activities with your direct reports.
- The planning and communication between employees and supervisors is a beneficial aspect of creating an IDP.
- You are responsible for initiating discussions with your direct reports about Individual Development Planning, and for approving IDPs.
- It is important to meet periodically with your employees to track progress and to adjust the Plan if necessary.
- For additional information on the IDP, go to <https://saterninfo.nasa.gov>.