Learning Plan Creation for Supervisors

DOI Talent offers a basic paperless IDP solution under the Learning Plan feature. Establishing a Learning Plan is required for all supervisory employees (and strongly encouraged for all employees), per DOI policy. Use of the paperless IDP/Learning Plan within DOI Talent is optional by learners at this time; but is accepted if chosen as the method to establish a Learning Plan. A template for each year is created in October for use by employees within DOI Talent. This year's template is currently available in DOI Talent, under the My Learning/Learning Plan sub-menu. Note: competencies are not currently enabled in the system.

1. Under the Team tab in the **green** banner at the top of the screen:
   a. Click on "Plans" under the employee's name you want to create the plan for
2. Click the **green** button "Create new learning plan"
3. Fill in the Plan Details:
   a. PLAN TEMPLATE – Select the appropriate plan template that you are using, e.g., Individual Development Plan 2020 (Best to use for Employee Learning Plan), Safety Development 2018/19 (Best to use when assigning Safety training).
   b. PLAN NAME – MANDATORY FIELD. You can keep the defaulted plan name or change it to what you want to name it.
   c. PLAN DESCRIPTION – Optional, add the description of the plan.
   d. DATE STARTED – MANDATORY FIELD. Add the date that the plan can be started or leave as the default date.
   e. COMPLETION DATE – MANDATORY FIELD. Add the date that the plan needs to be completed by.
4. Click the **green** button "Create plan"

This will take you to a screen showing the Overview of the Learning Plan. With other tabs:

1. OBJECTIVES – Clicking "Add new objective" will allow you to add new objectives to this learning plan.
2. PROGRAMS – All the programs that form your learning plan are shown here. Clicking "Add Programs" will allow you to add new programs to this learning plan.
   a. Click the green button "Add Programs"
   b. Choose the Program you need to complete, e.g., Safety: Administrative Employee Safety Orientation.
   c. Click "Save"
   d. You can add as many programs as you need
3. COURSES – All the courses that form your learning plan are shown here. You can view any course by clicking the course title. Clicking "Add Courses" will allow you to add new courses to this learning plan.
   a. Click the green button "Add Courses"
   b. You can browse by the course categories or switch to the "Search" tab and add what you would like to search for, e.g., IMT
   c. Choose the Courses you need to complete, e.g., 2018 IMT: Desk References: Cybersecurity, FISSA, Section 508, Records Mgmt., Privacy, CUI & Quiz & 2018 DOI Rules of Behavior (ROB) and Warning Banner (IMT).
   d. Click "Save"
   e. You can add as many courses as you need
4. Once you have completed adding courses, at the top of the screen, if you choose to add a reason and then click the **green** button "Approval".
5. Once approved, the employee will receive an email with a link to the plan.
   a. Or they can find the plan by hovering over "My Learning" in the **green** banner at the top of the screen and choosing "Learning Plans".