

Performance: Individual Development Plan

INDIVIDUAL DEVELOPMENT PLAN

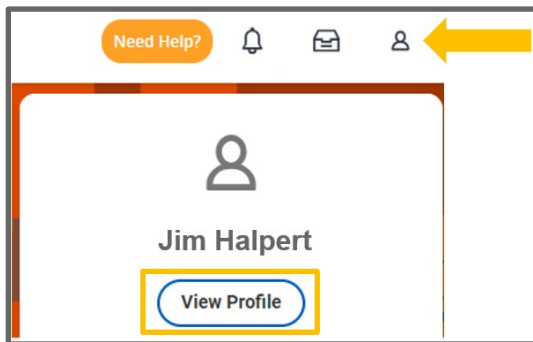
An Individual Development Plan (**IDP**) is a tool in Workday to assist you with planning your career and professional development in a measurable and meaningful way.

Through preparation and planning, an IDP's primary purpose is to help you **create and reach short and long-term goals**, as well as **improve current performance**.

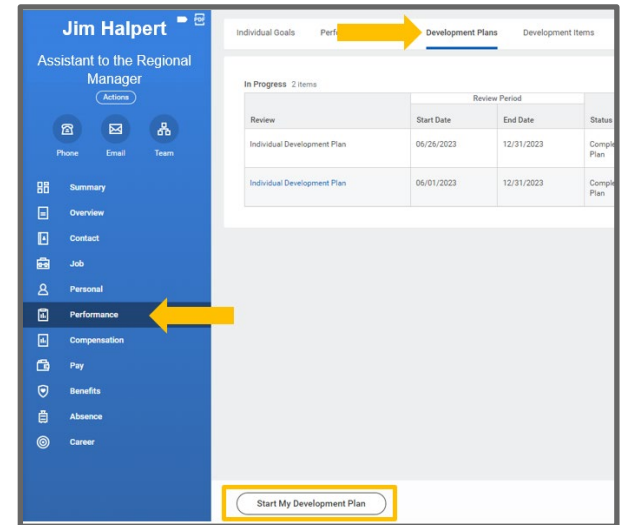
Note: An IDP is not the same as a performance review. Development is an on-going activity and should be viewed as a partnership between you and your leader.

START A NEW DEVELOPMENT PLAN

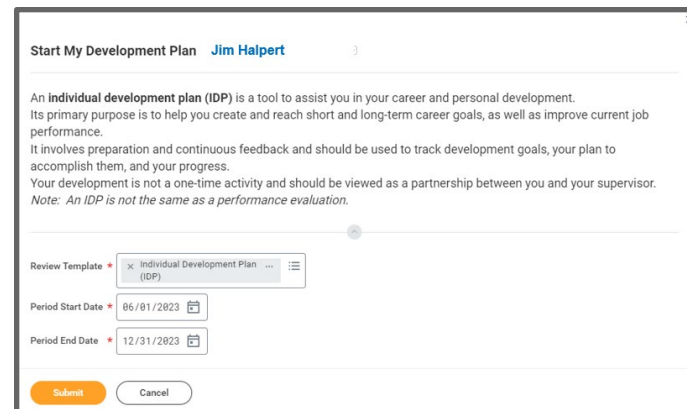
1. Select the **Profile** icon in the top right of your screen.
2. Select **View Profile**.



3. Select **Performance** from the menu on the left.
4. Select **Development Plans** tab
5. Select **Start My Development Plan** at the bottom of the page.



6. A pop-up box appears:




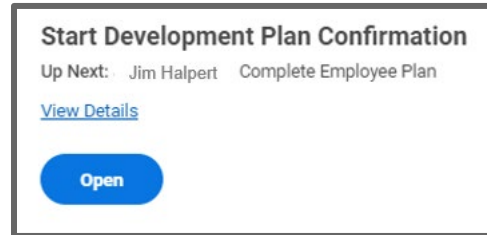
- a. For the **Review Template** drop-down, select the **Development Goals** option, then select **Individual Development Plan (IDP)**.
- b. Enter the **Development Period Start and End Dates**.

Performance: Individual Development Plan



Note: The Period Start and End dates are created by you and should reflect the timeline for accomplishing **this specific plan**. Additional plans can be added at any point in time.

7. Click **Submit**.
8. Click **Open** on the pop-up screen or navigate to your Workday inbox  icon in the top right of your screen and click on the IDP task in your inbox.



9. Click **Get Started**.
10. In the **Questions section**, provide your responses in the **comment boxes** and when finished, select **Next**.
11. From the **Development Items** section, select **Add**. These are the items that will assist you in the achievement of your overall IDP.
 - a. For **each Development Item**, complete the **Development Item** title, **Additional Information** (description), **Status** and **Start/Completion** dates. You can also add any **Status Notes** associated with each item.
 - b. Click **Add** for each additional development items.
12. Once you are done adding your **Development Items**:
 - a. Select **Save for Later** if you want to review your IDP later before finalizing it.
 - b. Or select **Next** to finalize your IDP.



Note: Text fields reset after 15 minutes of inactivity in Workday. Items not saved before the reset will be erased from the form.

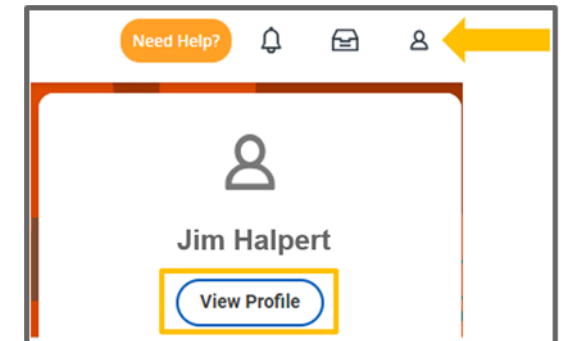
13. The next screen allows you to **review the content** of your overall IDP.
14. Once your review is complete:
 - a. Select **Save for Later** if you want to review your IDP later before finalizing it.
 - b. Or select **Submit** to finalize your IDP.



Note: Once you **Submit your IDP**, the content of the IDP cannot be changed. Development Items from the form are transferred to the **Development Items section in Workday**. These Items can be updated to document accomplishments and track progress but will not change the content on the originally submitted IDP.

VIEW SAVED & SUBMITTED DEVELOPMENT PLANS

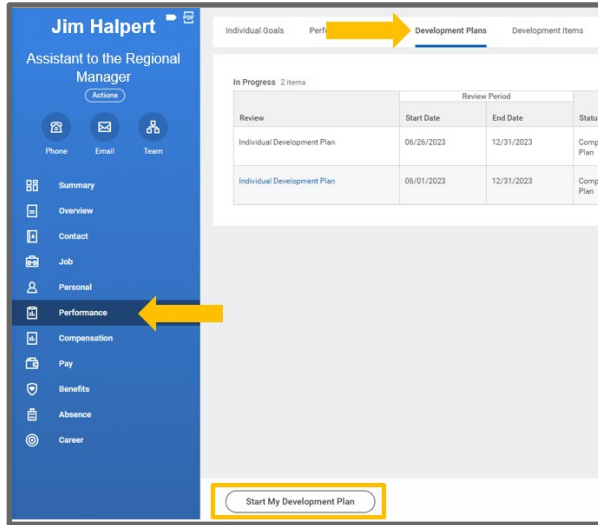
1. Select the **Profile** icon in the top right of your screen.
2. Select **View Profile**.



Performance: Individual Development Plan

3. Select **Performance** from the menu on the left.

4. Select **Development Plans** tab



5. Any **submitted** plans will appear under the **Completed** section. You can view the content of the plan by selecting the **View** option or you can download a PDF copy of it by selecting **Create New PDF**.

Review	Review Period Start Date	Review Period End Date	Status
In Progress 1 item			
Individual Development Plan (IDP): Jim Halpert	04/25/2024	07/31/2024	Complete Employee Plan for Development Plan
Completed 1 item			
Individual Development Plan (IDP): Jim Halpert	04/12/2024	12/31/2024	

6. Any plans **saved but not submitted** will appear under the **In Progress** section:

a. You can view the content of the in-progress plan by selecting the **View** option or **Create a New PDF**

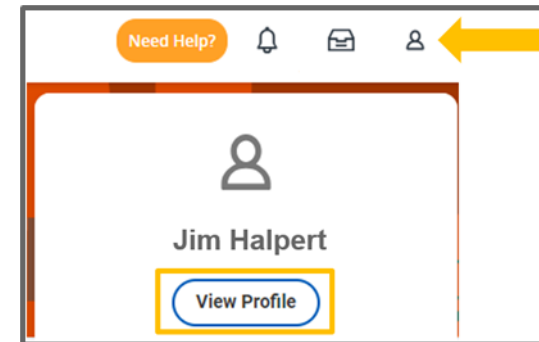


b. To make updates/modifications to the plan, click the plan and on the next screen, select **Open** and make the necessary edits/additions to the plan. Once finalized, select **Submit**.

VIEW EDIT AND ADD DEVELOPMENT ITEMS

Once an IDP is submitted, Development Items from the form are transferred to the Development Items section in Workday. Items can be updated to capture accomplishments and track progress for the plan. You can also create Development Items without having an IDP.

1. Select the **Profile** icon in the top right of your screen.
2. Select **View Profile**.





3. Select **Performance** from the menu on the left.

Performance: Individual Development Plan

4. Select **Development Items** tab




Note: Any edits made to Development Items from a **finalized/submitted IDP** will **not update the content in the IDP.**

5. Click the **Pencil**  icon to edit Development Items on your list.
6. Use the **Remove**  icon to delete Development Items from your dashboard.



Note: Once a development item is removed from your My Development Items it cannot be recovered.

7. Click the **Add** button to create a new development item.
8. Click the **Check**  icon to save edits before navigating away from the screen.



Note: Text fields reset after 15 minutes of inactivity in Workday. Items not saved before the reset will be erased from the form.