Total Workforce Management Services (TWMS) Quick User Guide

Managing IDPs - Workforce Manager



Periodic updates to the IDP module may not be reflected in this document.

Managing IDPs in TWMS

The Individual Development Plan (IDP):

- is a document created by an employee and his/her supervisor to address training and career plans
- serves as the "blueprint" for all short-term and long-term training and developmental actions which will enhance the employee's performance and career goals
- is a living document, and should be reviewed by the employee and their supervisor as changes are made due to progress of the employee's professional development and changes or revisions in career objectives

TWMS allows an employee and their supervisor to develop the employee's IDP by writing specific goals, objectives, and selecting training course titles and/or documenting developmental activities that will support them. The selected course titles and developmental activities should enhance the skills and knowledge for the employee's present position and their future career goals. Course titles are selected from the TWMS Course Table and function as the prompt to enroll in the selected course(s). Requests for training should be in accordance with this plan and subject to funding availability. Developmental activities are manually typed into the IDP and are not courses or programs. Developmental activities are specific activities, events, conferences, actions, etc. for the employee to participate in. Note: Approved SF182 forms, not the IDP, compile the employee's official record of training and academic achievements.

IDP Privileges in TWMS

There are three separate privileges that are available in TWMS related to the (IDP) module:

- 1. IDP Administration Allows access to the IDP Administration Tool under Tools & Functions
- 2. IDP Administration/Manage Default Settings Allows access to the IDP Administration Tool under Tools & Functions. Also allows the ability to manage default KSAs and Developmental Training for all users within a BSO
- 3. IDP Management Allows the user access to and management of the IDP via the "Training/Educ/Cert & Skills" form for all employee's within their scope regardless of the user's supervisory role

If you are listed as a supervisor in TWMS then you will automatically have access to your subordinates' IDP through their "Training/Educ/Cert & Skills" form. You will not need any additional privileges through your existing TWMS account. You can also access your subordinates' IDPs in the "My Workforce" view available in your self-service.

This user guide focuses on the Workforce Management side of the IDP module in TWMS and is meant for Supervisors, IDP Administrators, and other related personnel. The employee (self-service) side is detailed in a separate user guide, "My IDP".

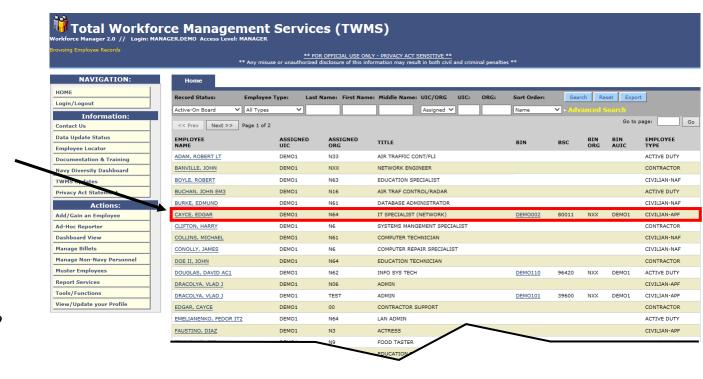
Accessing an IDP

If you are a supervisor or IDP Administrator you will often need to access an IDP to review the content that the employee has included for approval. You may need to make changes and/or update some content as you review the IDP. We always recommend that you communicate to the employee the changes that you've made using the "Communications/Change History" tab discussed later in this guide.

To access an IDP*:

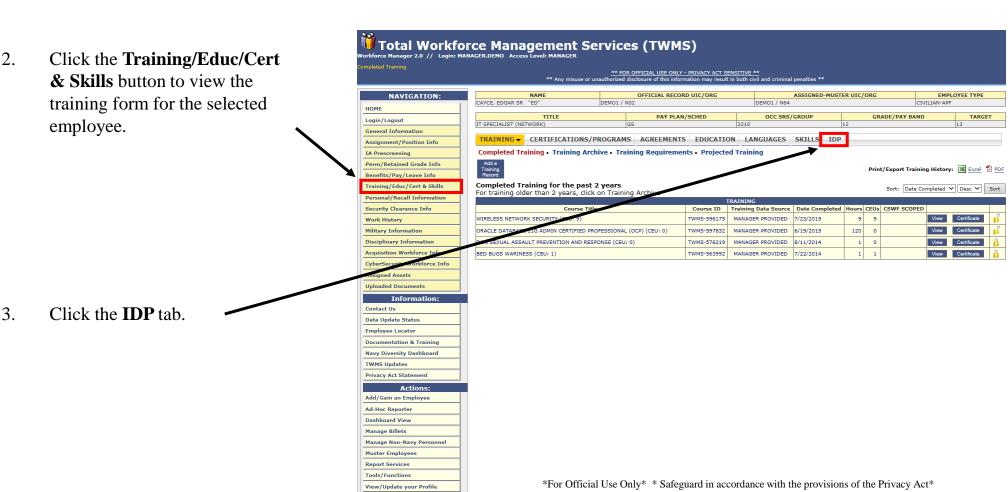
. From the Home Page click on the name of the employee whose IDP you would like to review.

*If you are not listed as an employee's supervisor you must have the appropriate privileges to access IDPs.



Accessing an IDP

All IDPs can be accessed from the employee's Training/Educ/Cert & Skills form. If you are the supervisor for this employee or you have the appropriate privilege you will have access to their IDP.



Viewing Position Info/Goals & Objectives

The IDP will open in a new window and is available for edits, updates, and/or approvals. If the IDP has not been created then the current view will display two tabs. The first tab, "Position Information/Goals & Objectives", is the default view and is shown below. In addition to displaying the employee's Position Information, this tab also displays if they are a member of the DAWIA workforce.

🕽 Total Workforce Management Services (TWMS) Information about the Export to PDF employee and the current CAYCE, EDGAR status of their IDP is INFORMATION TECHNOLOGY & MGMT Not Created displayed in the header. To begin developing this IDP, please enter at least a Short Term Goal(s) and then save your changes. Other tabs will be available once save is completed Information about the Supervisor Name WOLFE, MICHAEL Supervisor Email Work Fmail employee's position is Type of Appointn displayed here. **DAWIA Career Level** \square No Further Development Needed **DAWIA** information required for the employee's position is displayed here. Objective (Optional) Are you interested in having a mentor? Are you interested in a developmental assignment?

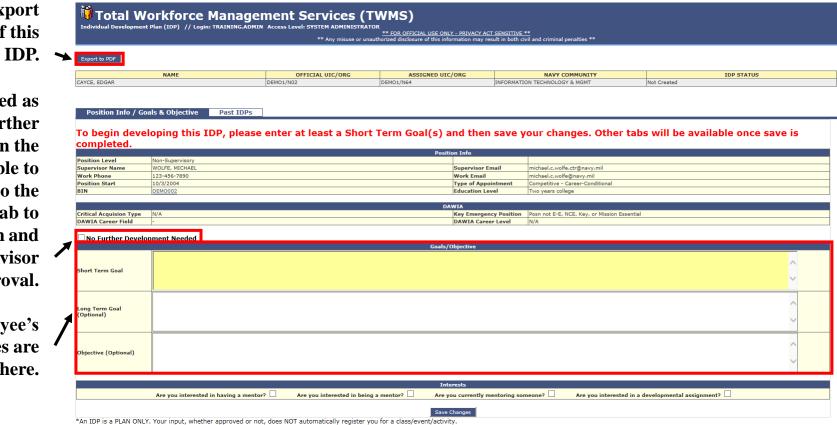
Viewing Position Info/Goals & Objectives

If this IDP is marked as requiring no further development then the employee will be able to immediately sign it and send to their supervisor for approval/disapproval. In all other cases, you or the employee must first enter, at minimum, a Short Term Goal. Upon the first save, the remaining tabs of this IDP will display.

Clicking here will export the current version of this

If this IDP is marked as requiring no further development, then the employee will be able to immediately move to the Submit/Approve tab to provide justification and send to their supervisor for approval/disapproval.

The employee's Goals/Objectives are written here.

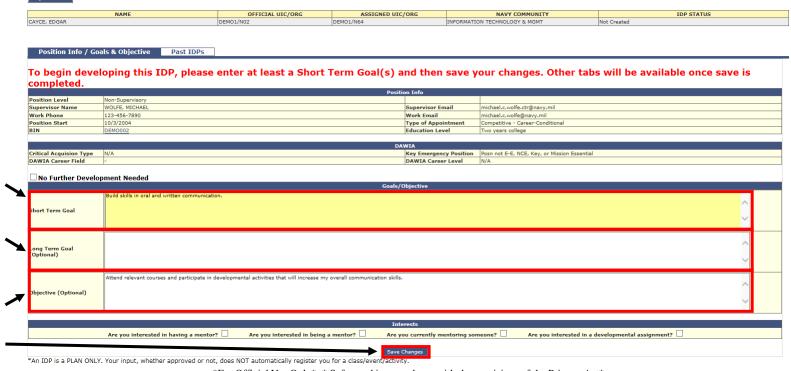


Adding Goals and Objectives to an IDP

The first step in creating an IDP is to enter the employee's goals and objectives. At least one Short Term Goal is required before being able to save an employee's IDP for the first time.

To add goals and objectives to an IDP:

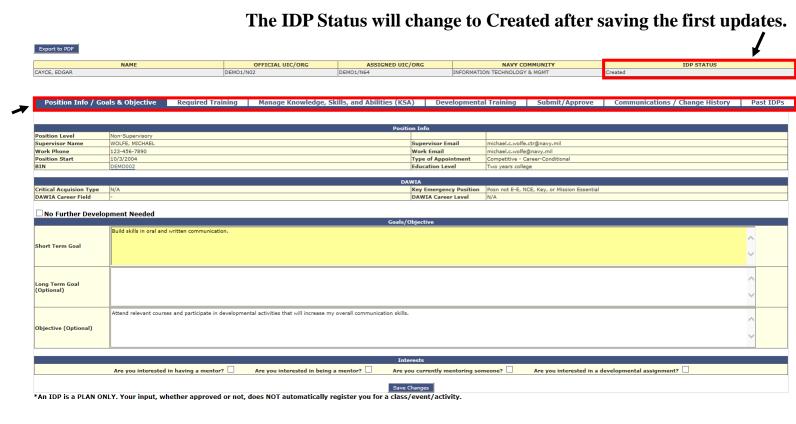
- Write the required short term goals here.
- 2. Write the long term goals here.
- 3. Write the expected objectives here.
- 4. Click **Save Changes**.



Adding Goals and Objectives to an IDP

The IDP will now display seven tabs which helps to both organize the information found in the IDP and to communicate changes between the employee, their supervisor, and the IDP Coordinator.

All information can be viewed by selecting one of these seven tabs.

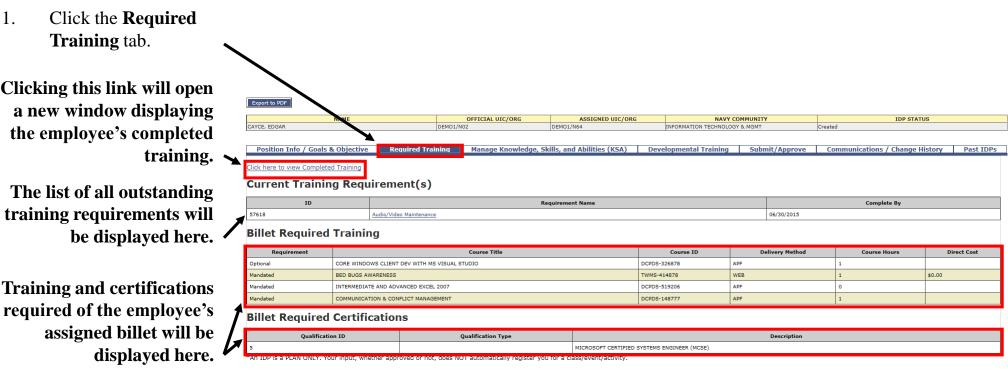


Note: For clarity, the steps listed here to develop this IDP move sequentially through the tabs from left to right. Most IDPs are developed and updated by viewing and updating the information in any of the tabs in any order as needed.

Viewing Completed/Required Training

The "Required Training" tab displays a link to the employee's completed training as well as a list of their current training requirements. If they are assigned to a billet it will also display any required training and/or certifications associated with that billet. Information displayed here is read-only.

To view the employee's completed/required training:

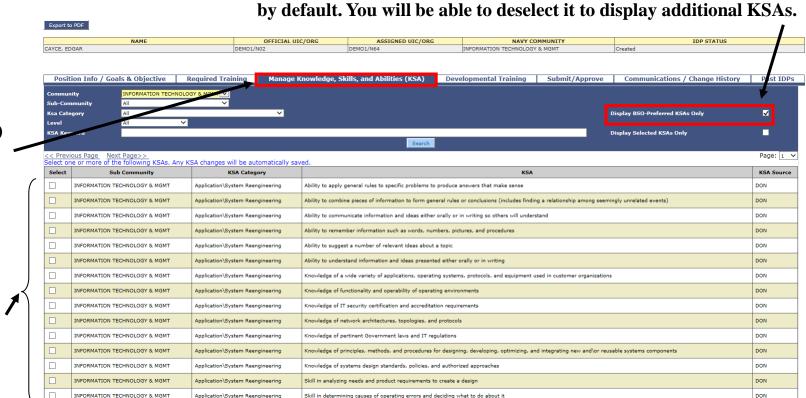


The goals and objectives previously entered will help you to search for and select the appropriate KSAs to add to this IDP. If your Command has pre-selected a list of preferred KSAs for you to choose from, then they will be displayed by default.

To select a KSA to add to this IDP:

1. Click the Manage
Knowledge, Skills,
and Abilities (KSA)
tab.

All KSAs resulting from your search criteria and/or selected checkboxes will be displayed here.



If your command has pre-selected KSAs then this checkbox will be selected

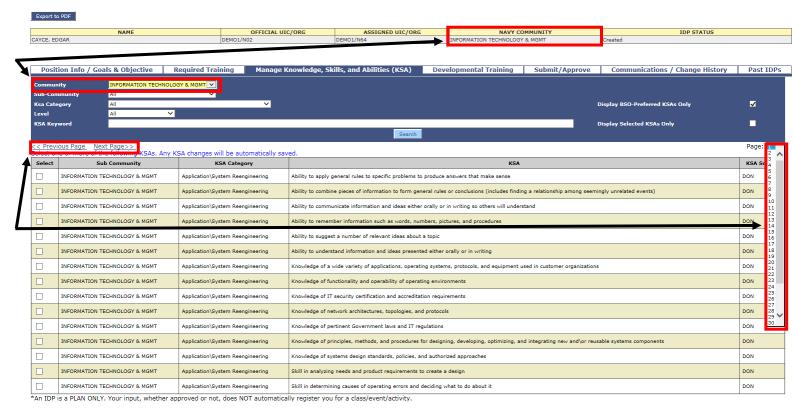
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*An IDP is a PLAN ONLY. Your input, whether approved or not, does NOT automatically register you for a class/event/activity.

The Navy Community the employee is assigned to will also determine the initial list of the displayed KSAs. KSAs are organized first by Community, then by Sub-Community, then by KSA Category, and finally Level. KSAs are NOT required in order to complete the IDP.

The Navy Community the employee is currently a member of will automatically be selected in the Community dropdown list.

You can use the page controls to scroll through all the displayed KSAs.

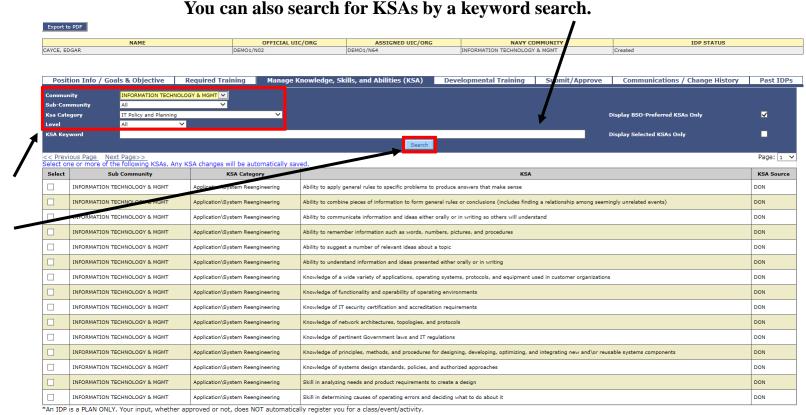


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Selecting and entering your KSA search criteria will help you to display only the KSAs that are relevant for the employee. The steps detailed here will show you how to select one or more KSAs to add to an IDP.

2. Select any combination of the four dropdown lists. The more selections you make the fewer KSAs will be displayed.

3. Click **Search**.



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All KSA selections/deselections will be automatically saved as part of thisIDP.

Remember that with this checkbox selected, your search results will only display the KSAs preferred by your command. You can deselect it to display any additional KSAs.

- 4. Select the checkbox(es) corresponding to the KSA(s) you would like to add to this IDP.
- 5. Repeat steps 2-3 to add other KSAs to this IDP.



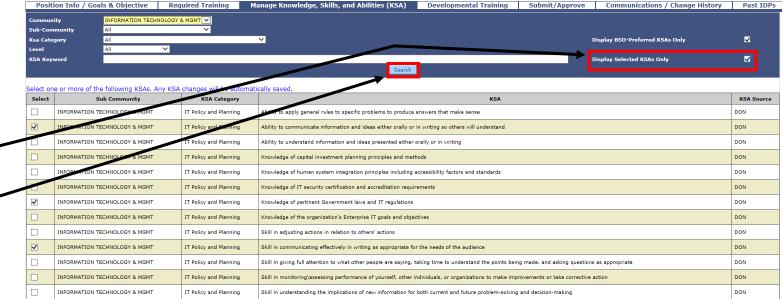
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Viewing the Selected KSAs

Now that you have selected at least one KSA to be included in the employee's IDP, you can choose to display only those you have selected.

To view only the selected KSAs:

- Select this checkbox to only display the selected KSAs.
- 2. Click **Search**.



*An IDP is a PLAN ONLY. Your input, whether approved or not, does NOT automatically register you for a class/event/activity.

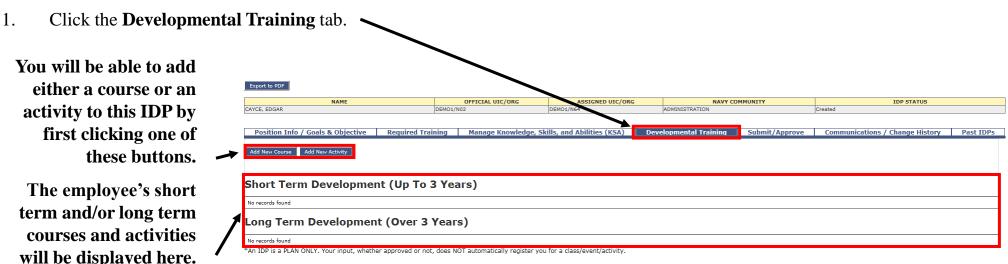
Only the selected KSAs will now be displayed.



Adding Developmental Training

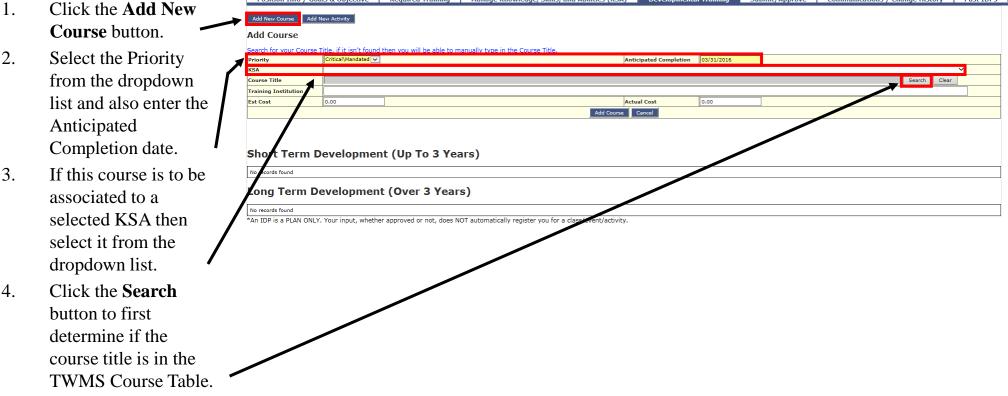
The information entered on the "Developmental Training" tab shown below forms the heart of the employee's IDP. Developmental training is comprised of both courses and/or activities that the employee will complete within a specified timeframe as agreed to between them and their supervisor. Courses are selected from the TWMS Course Table or, if not found, entered manually. Developmental Activities are always entered manually. All training courses and developmental activities added to this IDP are subject to the approval of the employee's supervisor.

To add developmental training to this IDP:



Courses added to an employee's IDP are first searched for in the TWMS Course Table. You will be able to associate a course to any of the previously selected KSAs but it is not required. Repeat the steps below to add as many courses to the IDP.

To add a course to an IDP:

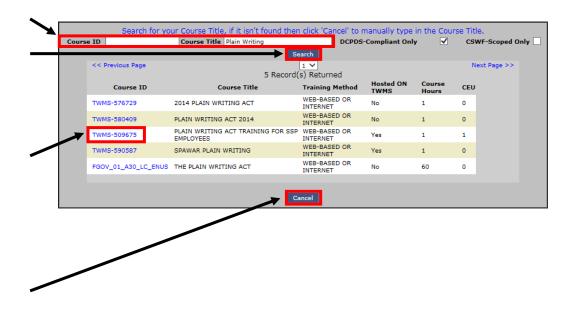


Search for the course title by a combination of either the known Course ID or by any part of the Course Title. If the course title isn't found then you will be able to enter the course title manually. It is important to realize that you are not enrolling the employee in a course nor are receiving any approval for them to take a course when adding a course to an employee's IDP.

- 5. Enter either the Course ID and/or any part of the course title.
- 6. Click **Search**.
- 7a. If the course title you're searching for is listed then click the Course ID hyperlink. Go to step 8.

OR

7b. If the course title you're searching for is not listed then click **Cancel**. Go to step 11.



Courses added to an IDP may also be used to initiate an SF182. For more information, see the section, "Linking a Course or Activity to an SF182" found later in this guide.

- 8. Enter any other information for this course as required.
- 9. Click the **Add Course** button.

This new course is now listed in the Short Term Development area because the anticipated completion date is within the next 3 years.

10. Repeat steps 1- 7a and 8-9 to add other courses to this IDP from the TWMS Course Catalog.

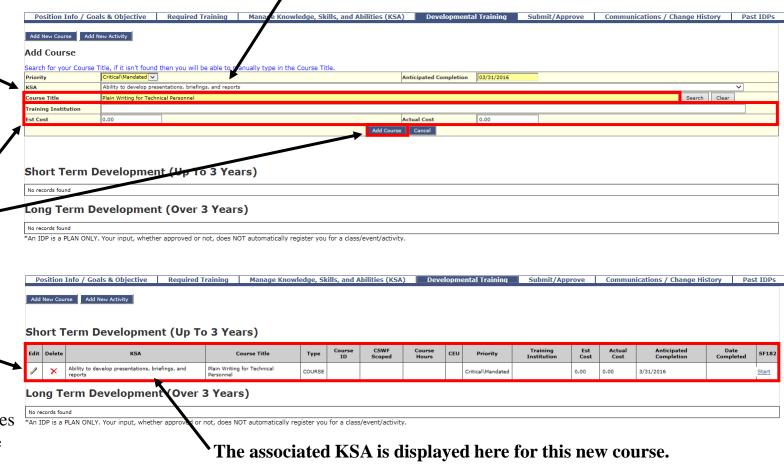


Courses added to an IDP may also be used to initiate an SF182. For more information, see the section, "Linking a Course or Activity to an SF182" found later in this guide.

- 11. Manually enter the course title for the course you want to add to this IDP.
- 12. Enter any other information for this course as required.
- 13. Click the **Add Course** button.

This new course is now listed in the Short Term Development area because the anticipated completion date is within the next 3 years.

14. Repeat steps 1- 7b and 11-13 to add other courses to your IDP not from the TWMS Course Catalog.



A KSA has been selected to associate with this new course.

Adding an Activity to an IDP

Activities added to an IDP are always manually entered. You will be able to associate an activity to any of the previously selected KSAs but it is not required. Repeat the steps below to add additional activities to the IDP.

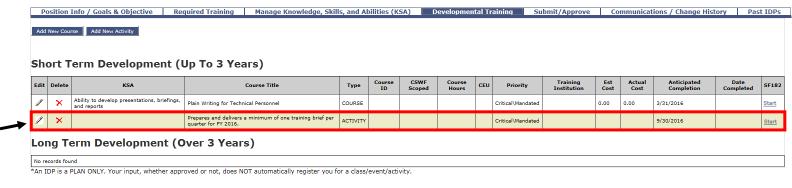
To add an activity to your IDP:



Adding an Activity to an IDP

Activities added to an IDP may also be used to initiate an SF182. For more information, see the section, "Linking a Course or Activity to an SF182" found later in this guide.

This new activity is now listed in the Short Term Development area because the anticipated completion date is within the next 3 years.



5. Repeat steps 1- 4 to add other activities to this IDP.

Linking a Course or Activity to an SF182

Sometimes the employee may need to fulfill a course or activity by enrolling in and taking a course offered by their local command or a training vendor. The employee's IDP will allow either you or them to link their developmental training to an SF182. As you may know, the SF182 tool in TMWS allows for the necessary approvals for enrolling in a course and is electronically routed for these approvals. Once a developmental training event is linked to an SF182, all changes to the event (cost, anticipated completion, etc.) can only occur on the SF182. These changes will be reflected on the Short or Long Term Development areas of the IDP.

To link a course or activity to an SF182*:

- Click the **Developmental Training** tab.
- Select the **Start** link corresponding to the course or activity.
 - * You must have the appropriate privilege to initiate SF182s.



Linking a Course or Activity to an SF182

Your view will now display a new SF182 linked to the selected course or activity. Initially, only the "Section A – Trainee Information" tab of the employee's SF182 will display. This section must be completed first before the other sections will display.

The employee's information will always display in the header when viewing their SF182s. The initial status is "Not Created".

Click here to return to the employee's IDP.

- Enter any relevant information for this SF182 that doesn't already appear. Fields appearing in yellow background are required.
- 4. Click the **Save Changes** button.

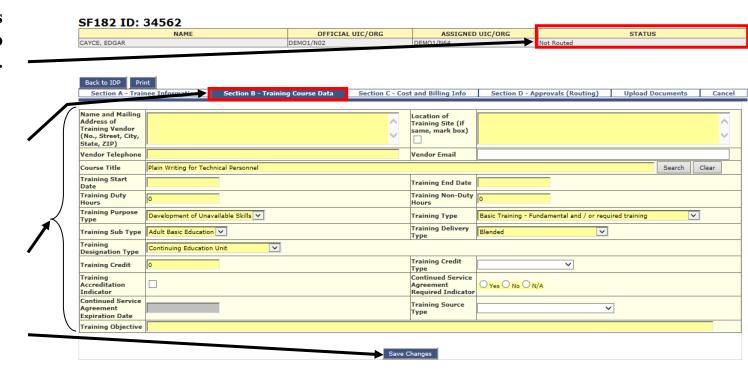


Linking a Course or Activity to an SF182

After saving the information in Section A, the remaining sections of the SF182 will display. You are now able to complete the information required in these other sections. The "Section B – Training Course Data" tab is displayed below.

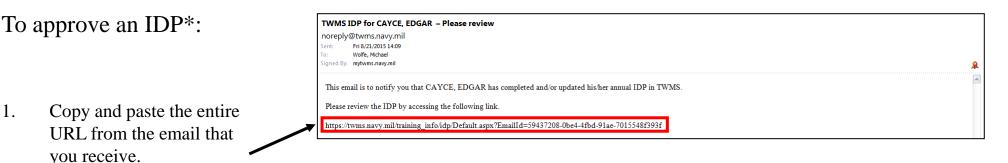
After the initial save, the status of your SF182 will change to "Not Routed".

- Click the Section B –
 Training Course Data tab.
- 6. Enter the information as appropriate. Fields having a yellow background are required.
- 7. Click the **Save Changes** button.



Note: Please refer to the "My SF182" Quick user guide for more information on completing and routing your SF182s.

Supervisors will receive emails from the employees they supervise each time one of them digitally signs their IDP. Copying and pasting the URL displayed in the email will open the IDP of that employee. The supervisor can then review, make changes to, and/or approve/disapprove the employee's IDP.



^{*} You must be a supervisor of the employee in order to approve their IDP.

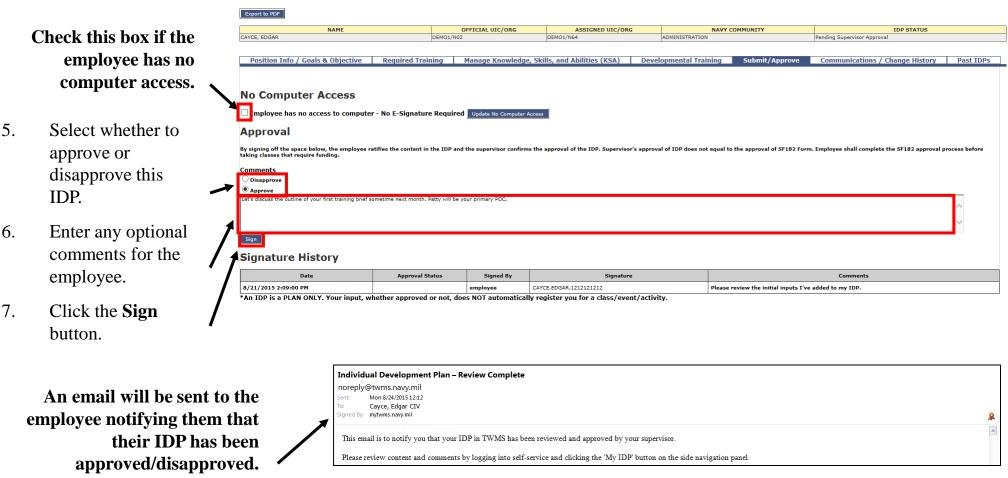
This employee's IDP will open in a new window. The default view is the Submit/Approve tab shown below. Before deciding to approve/disapprove the IDP, you will be able to review it and/or make any necessary changes. After approving the IDP, the employee can begin to complete their developmental training. You will only be able to sign IDPs that have the IDP Status: Pending Supervisor Approval.

Note: After the employee has submitted their signature, the IDP For each tabbed Status will change to "Pending Supervisor Approval". section, review the information this employee has ADMINISTRATION included in their IDP. For more information, follow **No Computer Access** Employee has no access to computer - No E-Signature Required the steps found Approval earlier in this guide. to the approval of SF182 Form. Employee shall complete the SF182 approval proces 3.

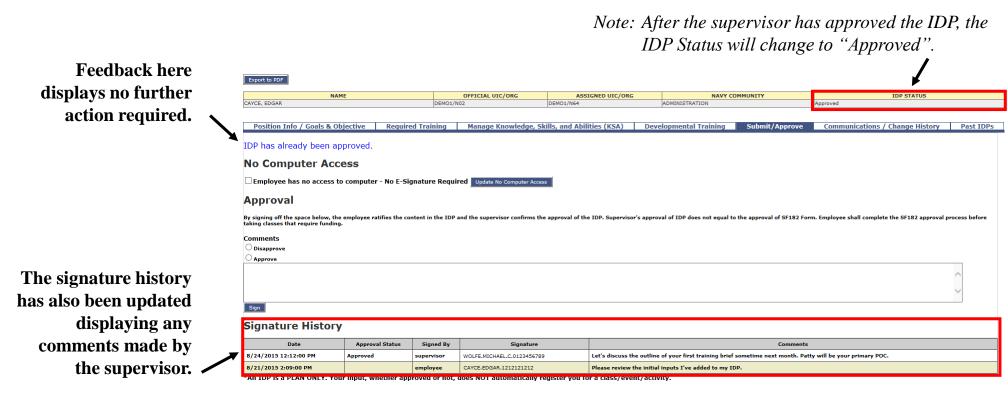
Signature History

- Make any necessary changes as needed prior to approving this IDP.
- 4. If necessary, click the **Submit/Approve** tab.

After approving/disapproving the employee's IDP, an email will be sent to them notifying them of the approval/disapproval.

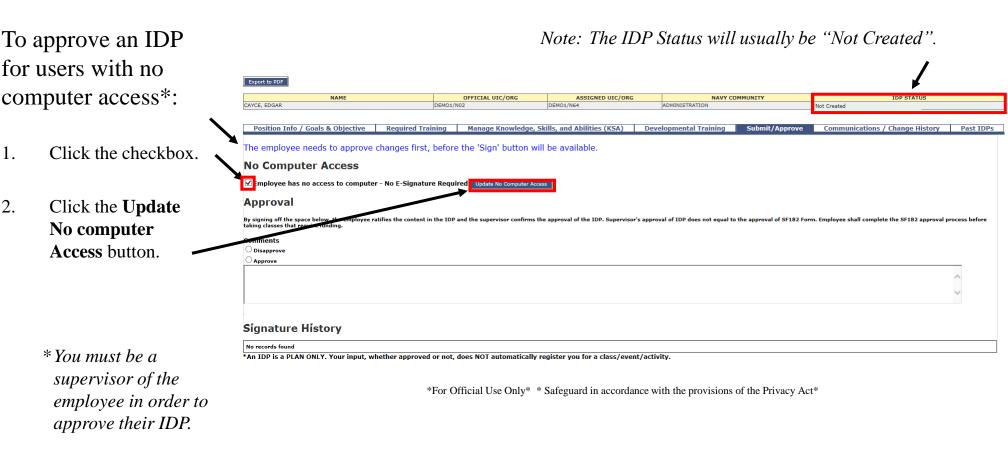


The status of this IDP will change to reflect your approval. If the employee makes any changes to the IDP after it has been approved the status will change to "Updated". The employee must re-submit their signature for supervisor approval of these changes.



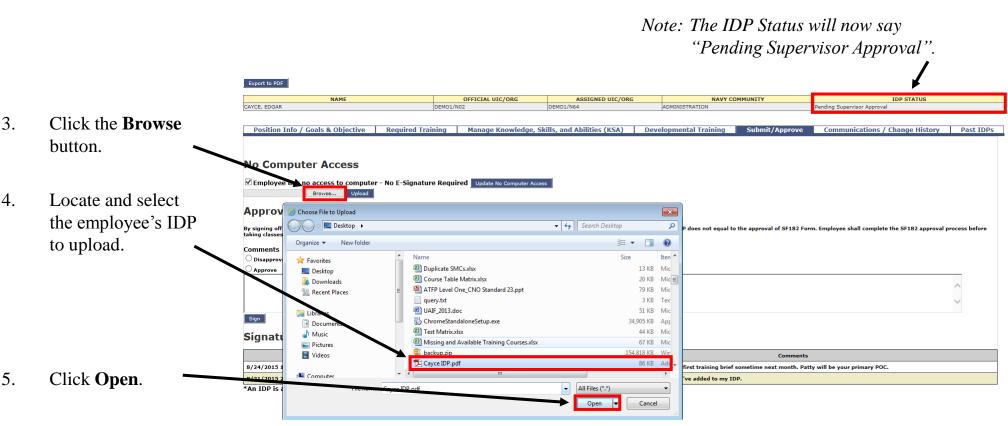
Approving an IDP for Users with No Computer Access

If an employee has no computer access then, as their supervisor, you will still be able to approve their IDP from a hard copy. Open the employee's IDP in TWMS and then navigate to the Submit/Approve tab shown below.



Approving an IDP for Users with No Computer Access

You will have the ability to upload a scanned PDF file of the employee's IDP that is signed by both you and the employee.



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Approving an IDP for Users with No Computer Access

Click the **Upload** button.

Computer Access No E-Signature Required Update No Computer Access Approval Comments Olisapprove O Approve Signature History *An IDP is a PLAN ONLY. Your input, whether approved or not, does NOT automatically register you for a class/event/activity.

Manage Knowledge, Skills, and Abilities (KSA) Developmental Training

Once the IDP has been uploaded then it can be viewed by clicking the "View Doc" button.

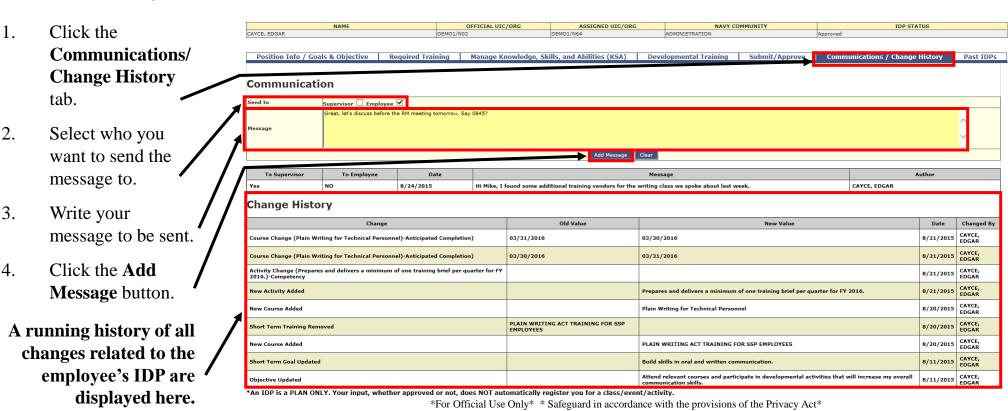
| Position Info / Goals & Objective | Required Training Ma | anage Knowledge, Skills, and Abilities (KSA) | Developmental Training | Submit/Approve | Communications / Change History | Past IDPs |
|--|---|---|--|------------------------------|---|---------------|
| rosidon fino / dodis de objective | Required framing Fig. | mage knowledge, Skins, and Abinetes (RSA) | Developmental Training | Submit, Approve | Communications / Change History | rust IDF3 |
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| | View Doc | | | | | |
| Approval | | | | | | |
| By signing off the space below, the employe taking classes that require funding. | e ratifies the content in the IDP and the | e supervisor confirms the approval of the IDP. Supervis | or's approval of IDP does not equal to | o the approval of SF182 Forn | n. Employee shall complete the SF182 approval p | rocess before |
| Comments | | | | | | |
| O Disapprove Approve | | | | | | |
| — Approve | | | | | | |
| | | | | | | |
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| Signature History | | | | | | |
| No records found | | | | | | |
| An IDP is a PLAN ONLY. Your input. | whether approved or not, does | NOT automatically register you for a class/eve | ent/activity. | | | |

IDP STATUS

Viewing IDP Messages & Change History

It is easy to communicate any information or questions about or changes to an employee's IDP. Any messages that a supervisor, IDP Coordinator, or the employee add to this IDP can be viewed in the Communications/Change History tab. Here, you can also view a history of all changes related to the employee's IDP.

To add a message to an IDP:

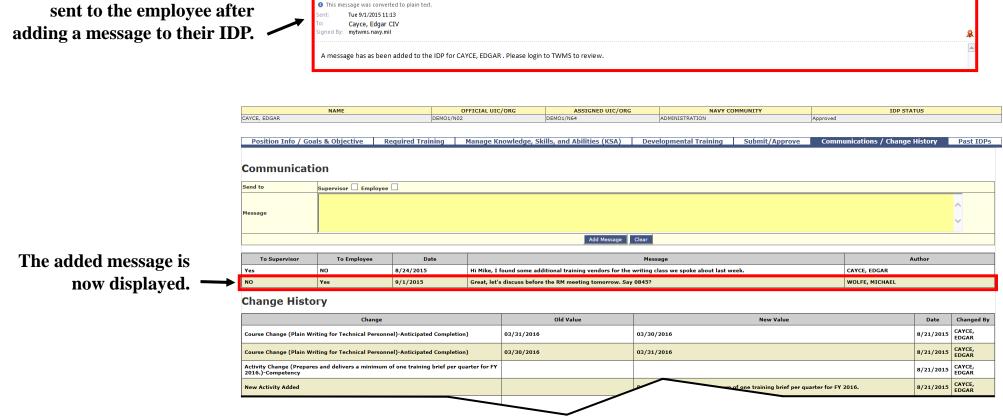


Viewing IDP Messages & Change History

An email will be sent to the employee notifying them that a message has been added by you in regards to their IDP.

TWMS Individual Development Plan (IDP) Message for CAYCE, EDGAR - Please review

noreply@twms.navy.mil



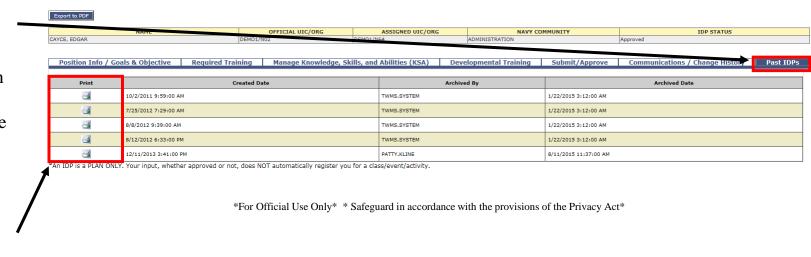
Here is a sample email that is

IDP History

You will be able to review any previous IDPs that have been archived by you as the employee's supervisor or as an IDP Coordinator. Past IDPs are for viewing or printing purposes only and cannot be altered in any way.

To view past IDPs:

- Click the Past IDPs tab.
- 2. Click the **Print** icon next to any of the IDPs you would like to view. The selected IDP will open in a new window for saving or printing.



Accessing the IDP Administration Tool

The IDP Administration tool is usually given to personnel involved in the management of IDPs within a local command, department, or group. They are referred to here as IDP Coordinators.

To access the IDP Administration tool*:

- I. From the Home Page click on the **Tools/Function** button on the Actions Menu.
- From Tools/Functions choose the **IDP** Administration button located under the Training Tools header.
 - * You must have the appropriate privileges to access this tool.



Accessing the IDP Administration Tool

The IDP Administration tool will open in a new window. Depending on the privileges you have with your TWMS account, there are up to four available views within the tool. The Search view is the default view and is shown below. The other views are discussed later in this guide. All are accessed from the Navigation menu.

The Navigation menu allows you to exit the tool as well as accessing the other views of the IDP Administration tool.



Searching for Employees

The IDP Administration tool allows you to send specific messages, export various lists of IDP information, or archive IDPs. These actions will only affect the employees that you have selected within your scope of access.

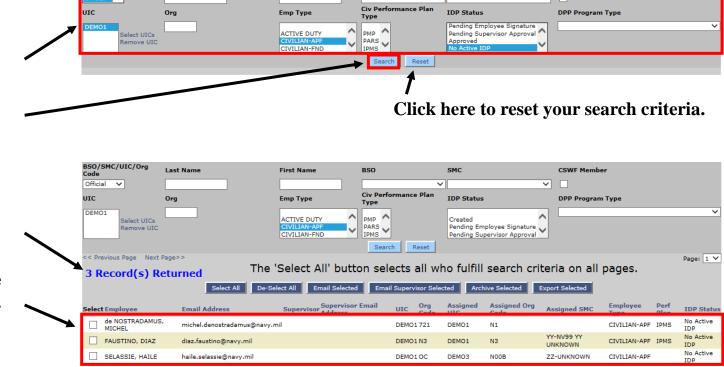
Last Name

To search for employees:

- 1. Select and/or enter your search criteria here.
- Click the **Search** button.

The number of records returned based on your search criteria is displayed here.

Your search results are displayed here.



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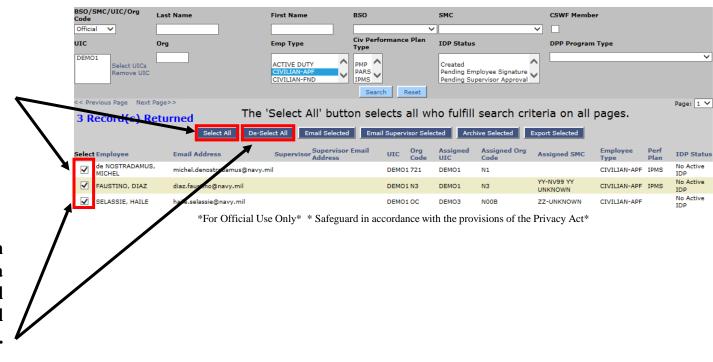
Selecting Employees

You must first select one or more employee(s) before you can send specific messages, export a list of IDP information, or archive IDPs.

To select employees:

- Click the **Select All** button or click an individual checkbox corresponding to the employee you want to select.
- 2. Click the **Search** button.

Clicking the "De-Select All" button or clicking an individual checkbox a second time will either deselect all employees or deselect an individual employee respectively.



Emailing Employees

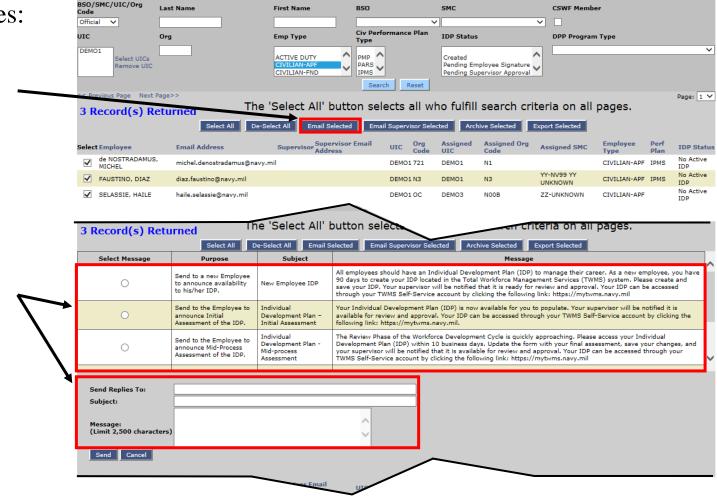
Several pre-written messages are available for you to select from to help you communicate to your employee's regarding general topics related to their IDP.

To email selected employees:

1. Click the **Email Selected** button.

2. Select either a pre-written message or write a custom message that will be sent to the selected employees.

Note: You will also be able to change a pre-written message before sending it.



Emailing Employees

You also have the ability to write a custom message to the employees you have

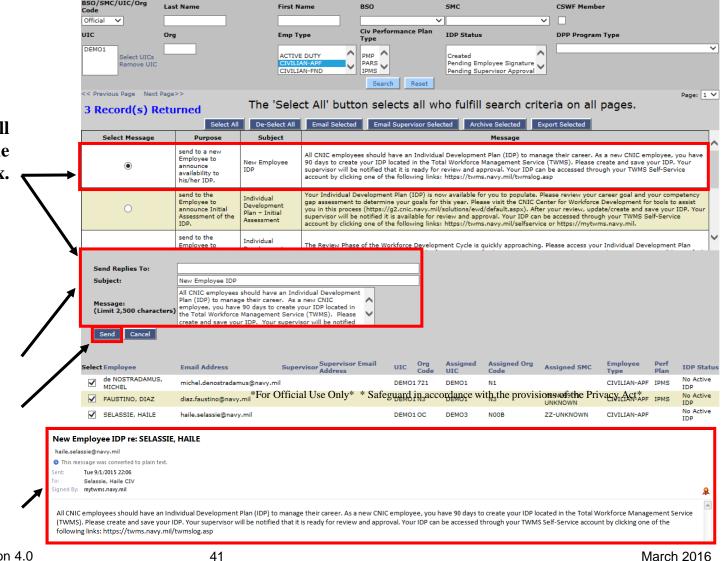
selected.

Selecting a pre-written message will populate the Subject line and the Message text box.

3. Make any necessary changes to the Subject line, the body of the message, or the email address of who should receive replies. By default, the reply email address will be the person who is sending the message.

Click the **Send** button.

Here is a sample email that is sent to the employee after the IDP Coordinator sends a message.



Archiving IDPs

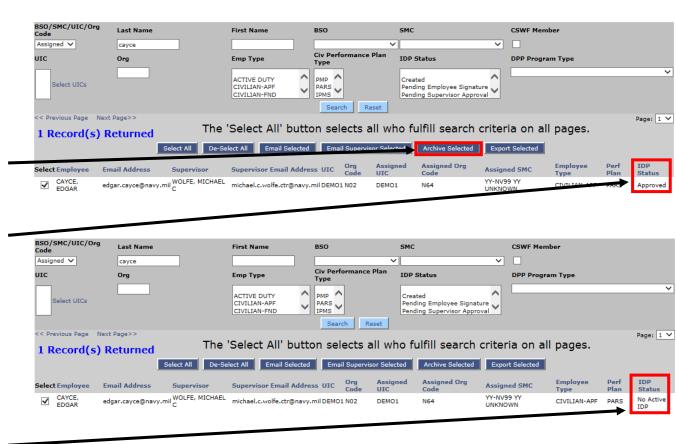
The IDP Administration tool allows you to archive IDPs of selected employees. Once an IDP is archived it cannot be changed. Typically, only IDPs having an "Approved" status are archived.

To archive IDPs for selected employees:

Click the Archive Selected button.

Note: The IDP Status for this employee's IDP is "Approved".

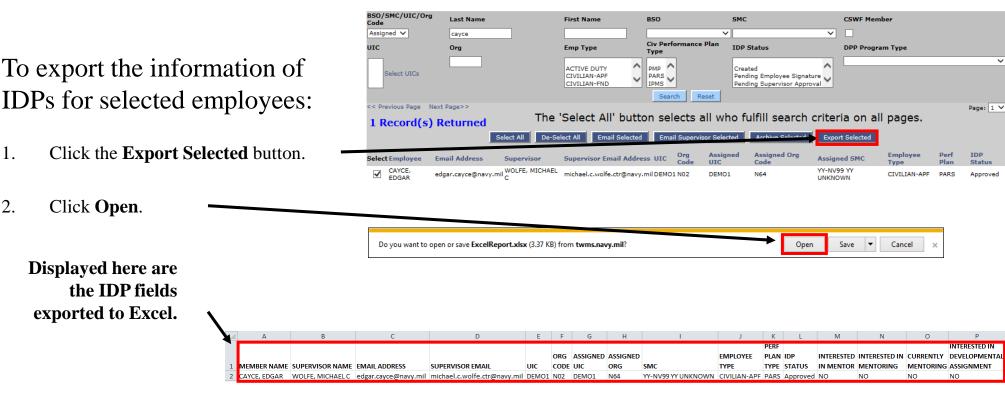
After an IDP is archived for the selected employees, the IDP Status for each will change to "No Active IDP".



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Exporting IDP Information

The IDP Administration tool allows you to export IDP-related information to an Excel spreadsheet for the employees you have selected.



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Note: After exporting this information, you will be able to save and/or print the spreadsheet.

IDP Dashboard

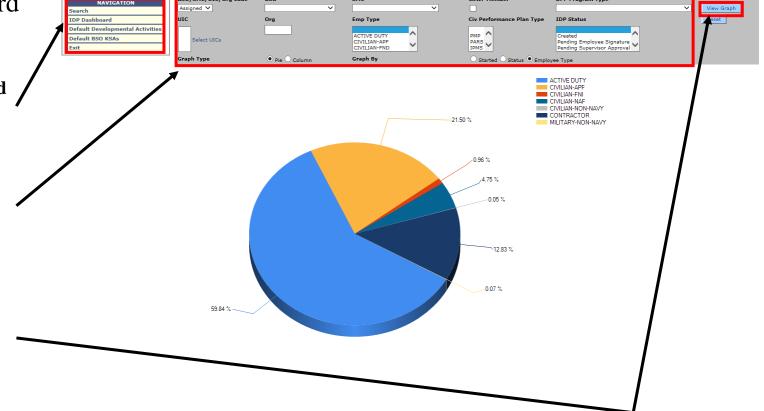
The IDP Administration tool allows you to view dashboard information for IDPs within your scope of access. The information can be displayed by pie or column charts. This view can be accessed from the IDP Dashboard button on the Navigation Menu.

To view IDP Dashboard information:

1. Click the **IDP Dashboard** button.

2. Enter and/or select any filters for the graphs you like displayed.

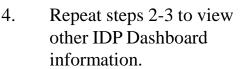
3. Click the **View Graph** button.



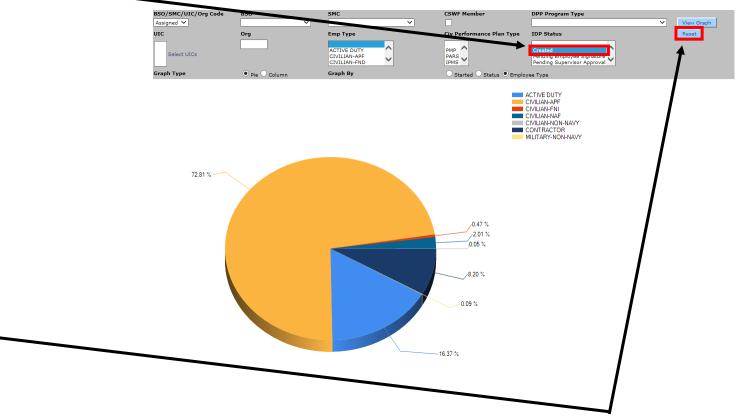
IDP Dashboard

Selecting different filters from the dashboard will display new information.

Here we have selected to only view the percentages, by employee type, of IDPs having the IDP Status of "Created".



5. Click the Reset button to clear all filters.



Adding Default Developmental Activities

The IDP Administration tool allows you to add a developmental activity to a specific KSA you have selected. A developmental activity is either a defined activity or a training course. The activity or course you have added for a KSA will be displayed on the employee's IDP if they choose that identical KSA.

To add a default developmental activity*:

- 1. Click the **Default Developmental Activities**button.
- 2. Select the filters to display the specific KSA you want to add a developmental activity for.



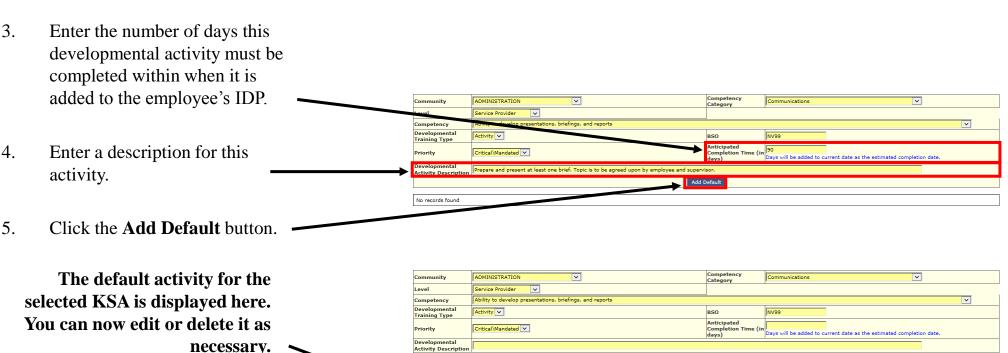
Note: The form will change depending on the Developmental Training Type you select. The steps shown here add an "Activity".

The steps for adding a "Course" are similar. The only difference is that you must first search for the course title in the TWMS Course Table. If it isn't found then you will be able to manually enter it.

^{*}You must have the appropriate privileges to access this tool.

Adding Default Developmental Activities

KSAs in which you have added a default Developmental Activity for will be displayed to help the employee develop their IDP. These activities aren't required to be added by the employee.



6.

Repeat steps 2-5 to add other

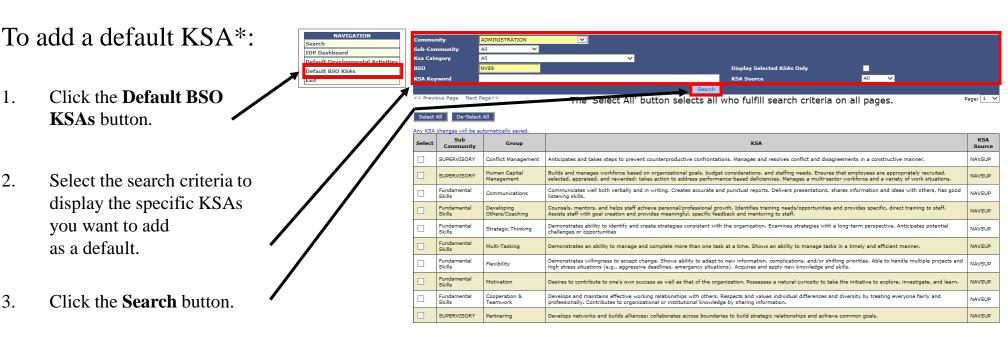
Ability to develop presentations

Type

Activity

Adding Default BSO KSAs

The IDP Administration tool also allows you to add specific KSAs you would like to displayed as defaults for all employees within your BSO. In addition to the ones you can select here for the employee, all Department of the Navy (DON) KSAs will always be displayed. The employee will also have the ability to view all KSAs in their IDP regardless of whether it has been selected as a default.



^{*} You must have the appropriate privileges to access this tool.

Adding Default BSO KSAs

Some BSOs have provided TWMS with a specific list of KSAs that are not included in the DON standard list of KSAs. They can be viewed separately by selecting the BSO from the "KSA Source" dropdown. All KSA selections/deselections will be automatically saved as part of the defaulted list for the KSA search criteria.

You can view only the KSAs provided by a specific BSO here.

4. Click the checkboxes corresponding to the list of KSAs you would like to add as defaults for the KSA search criteria.
Note: The identical KSAs will display when the employee chooses the same search criteria in their IDP.
KSAs having a "KSA Source" of DON cannot be selected/deselected. They will always display in the employee's

av Selected KSAs Onl The 'Select All' button selects all who fulfill search criteria on all pages. Possesses knowledge of the activities supporting the planning, installation, configuration, testing, implementation, and management of the organization's systems environment in support of the organization's IM and IT architecture and business needs. Understands a variety of functions on a wide range of IM and TECHNOLOGY 8 Operating Systems issues, including providing advice and recommendations on architecture and business operating systems; interpreting and applying IM and IT policies, processes and guidelines; conducting analysis; and recommending resolution to problems and issues. NEORMATION TECHNOLOGY & Network Services of functions on a wide range of IM and IT issues, including providing advice and recommendations on network services; interpreting and applying IM and IT TECHNOLOGY & Application Software new or existing applications software. Understands the concepts of the implementation and integration of new Critical Thinking Shows high level of proactive initiative, effort, and commitment towards completing assignments in a timely manner. Demonstrates ability to organize work, set priorities, and determine resource needs. Determines short- or long-term goals and strategies to achieve them. Displays motivation and proactive behavior. Deals effectively with pressure; remains optimistic and persistent, even under adversity. Recovers quickly from setbacks NEORMATION TECHNOLOGY & nternet Management of IM and IT issues, including providing advice and recommendations on Internet, intranet, and extranet IM and IT policies, processes and guidelines, conducting analysis and recommending resolution to problems and issues, and preparing and presenting reports. and/or training, in response to customer requirements. Possesses knowledge of a variety of functions on a wide range of IM and IT issues, including providing TECHNOLOGY & advice and recommendations on customer support IM and IT issues; interpreting and applying IM and IT and recommending resolution to problems and issues; and preparing and presenting training Understands the SUP 01 business in a sufficient manner to make business decisions affecting the organization. Takes the initiative to learn more about the Organizationa Knowledge/Political NEORMATION Leadership **TECHNOLOGY &** Ability and commitment to serve the public

IDP. They are displayed here for

informational purposes only.