



TMS
2.0

VA

User Job Aid

My Development Plan: Copying Previous Goals to a New Development Plan

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(Revision date: October 23, 2020)

Purpose

At the beginning of each new fiscal year, you have two (2) options to continue your development planning:

1. Start fresh with a new, blank development plan.
2. Copy some, or all of your goals from last year's Employee File, to your Employee File for the new fiscal year.

Two important notes before you begin using My Development Plan!

- Your professional or personal development goals and activities **will not be used to assess or evaluate your performance.**
- Before beginning your My Development Plan, you must verify or select your manager on the **Employee Information** tile, within your **My Information** link, on your **My Learning** homepage. Use the "How to Change Your Manager in TMS 2.0" job aid to learn how to keep your manager current in TMS 2.0.

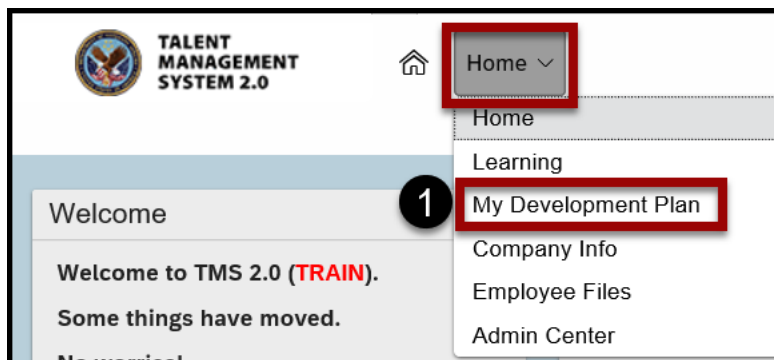
In this job aid, you will learn how to:

- Task A. Copy Previous Goals to a New Development Plan
- Task B. Edit a Goal
- Task C. Delete a Goal
- Task D. Verify/Update Goal Learning Activities

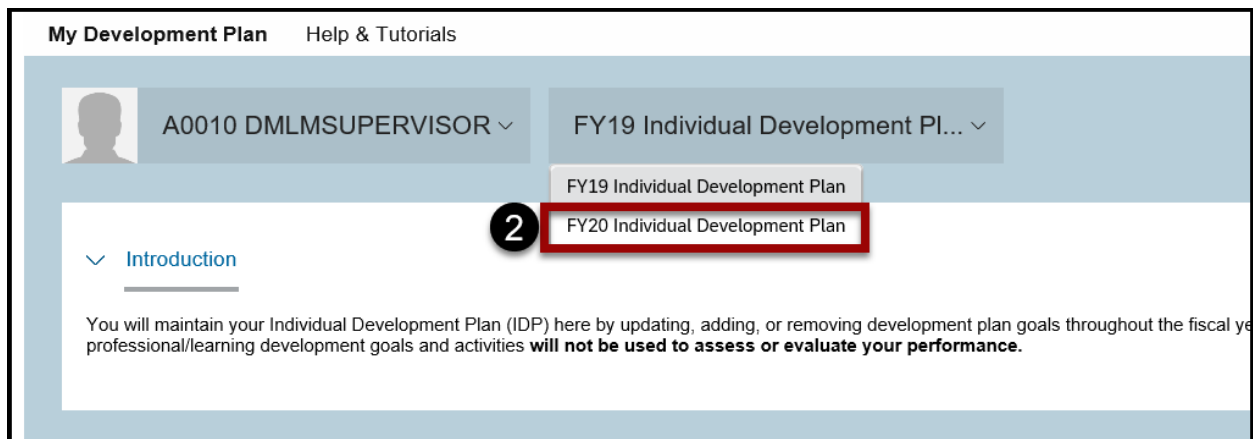


Task A. Copy Previous Goals to a New Development Plan

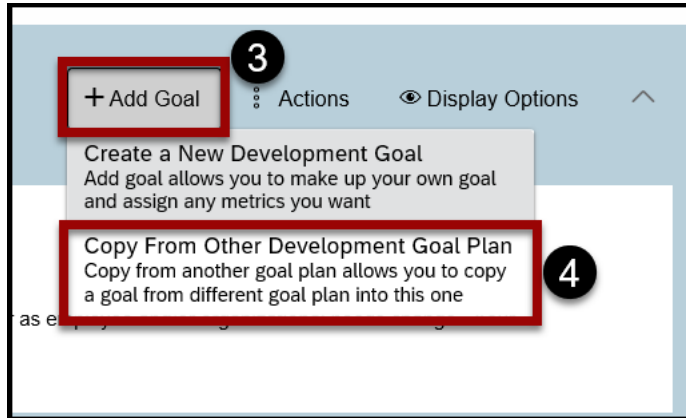
1. Login to TMS 2.0. Choose **My Development Plan** from the Home navigation drop-down list at the top of your TMS Home page



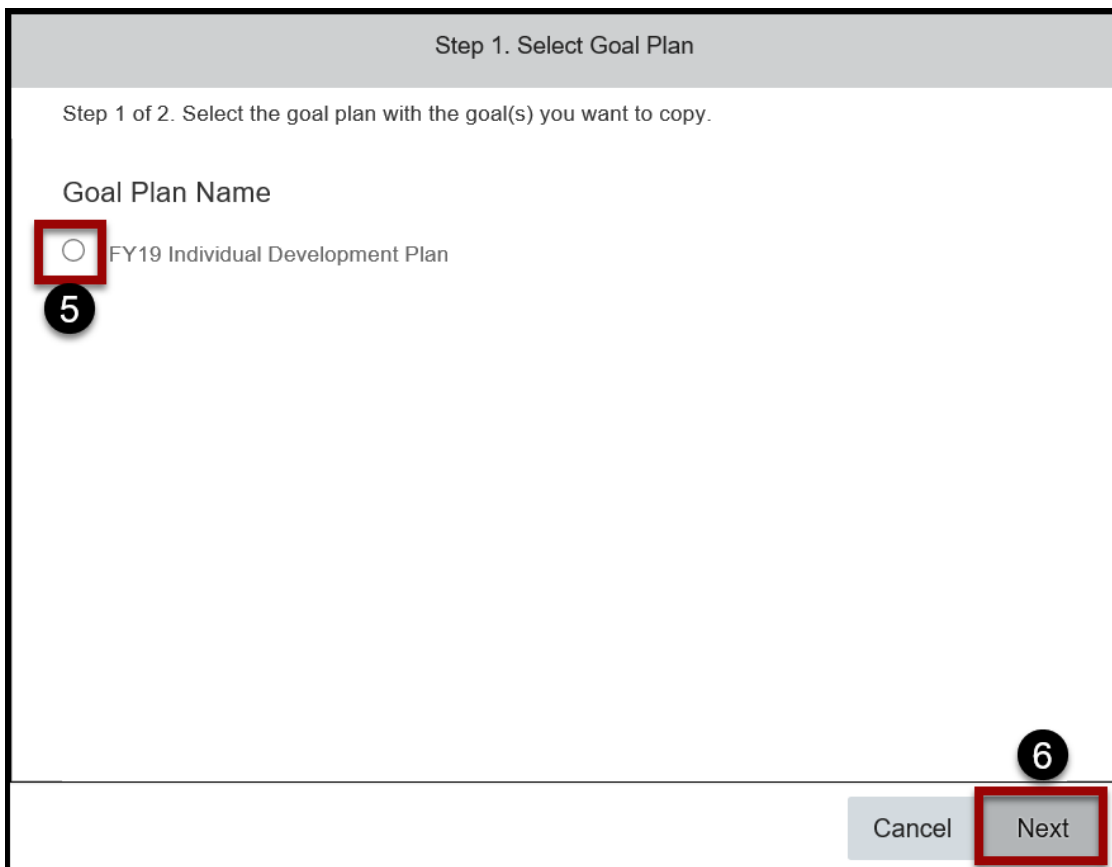
2. On the **My Development Plan** workspace page, select the current fiscal year's Individual Development Plan from the plan drop-down list on the top left of the page (e.g., FY21 Individual Development Plan). The new development plan will appear blank at first.



3. Select the **Add Goal** button at the top right of the page.
4. Choose the **Copy From Other Development Goal Plan** option.



5. During **Step 1: Select Goal Plan**, select the previous year's plan.
6. Select the **Next** button.



7. During **Step 2: Select Goal**, select the checkbox for any goal or goals you want to copy to your new plan
8. Once all choices have been chosen, select the **Copy** button.

Step 2. Select Goal

Step 2 of 2. Select Goal

Goals

Short-Term (0 - 1 Year)

Visibility	Goal Name	Estimated Cost	Actual Cost	Expected Outcome	Competencies	Goal Start Date	Status
<input checked="" type="checkbox"/>	Public 1.1 Learn TMS					10/01/2018	In Prog

Long-Term (1+ Years)

You have no development goal in this category.

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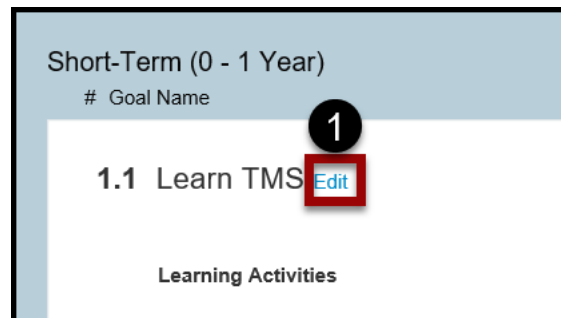
Cancel Back Copy



Task B. Edit a Goal

The copied goal or goals will now appear on your current development plan. You will notice the all goal-related information was also copied (i.e., start date, end date, status, and any learning activities associated with that goal). From here, you will need to verify and/or update the details for each copied goal.

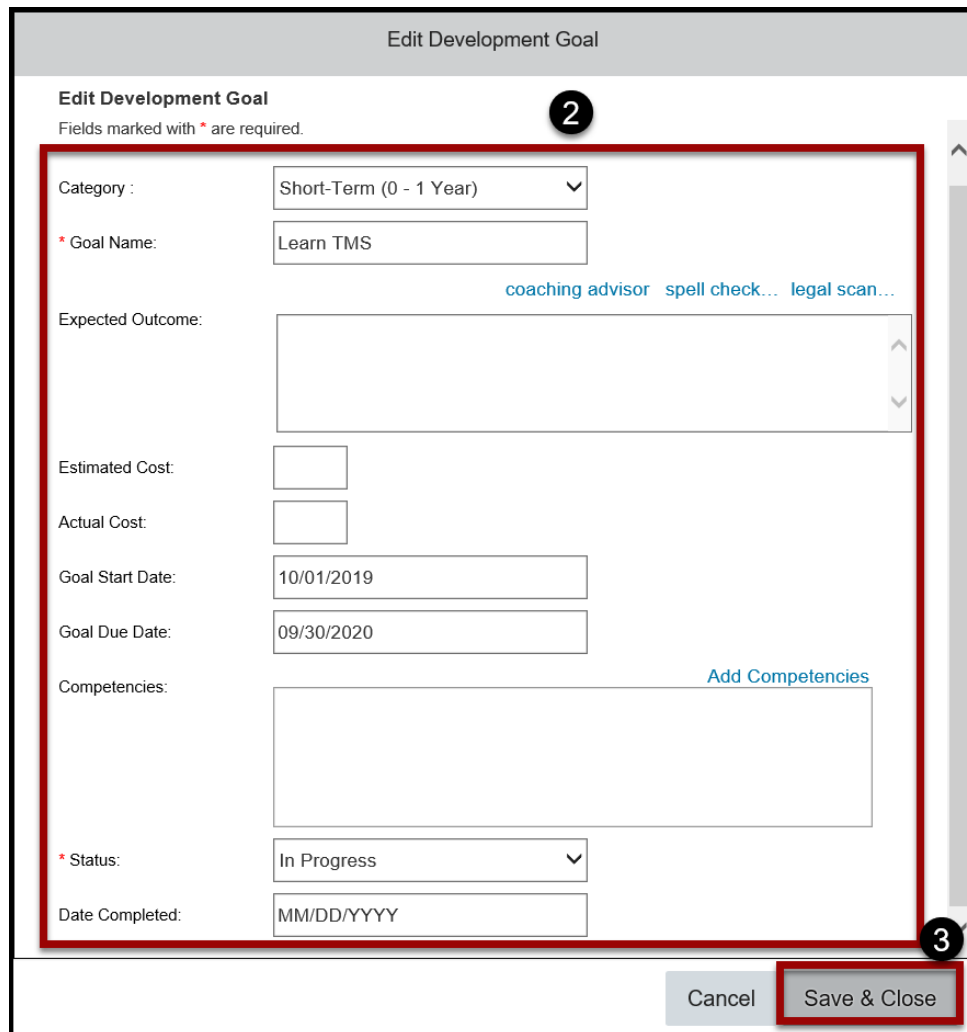
1. To update any of the copied goal details, select the **Edit link** next to the goal name.



2. Change any field needed to meet the new fiscal year goal.

Note: All fields that are required will be marked with a red asterisk (*).

3. Select **Save and Close**.



Edit Development Goal

Fields marked with * are required.

Category : Short-Term (0 - 1 Year) ▼

* Goal Name: Learn TMS

[coaching advisor](#) [spell check...](#) [legal scan...](#)

Expected Outcome:

Estimated Cost:

Actual Cost:

Goal Start Date: 10/01/2019

Goal Due Date: 09/30/2020

Competencies: [Add Competencies](#)

* Status: In Progress ▼


Date Completed: MM/DD/YYYY

Cancel **Save & Close**

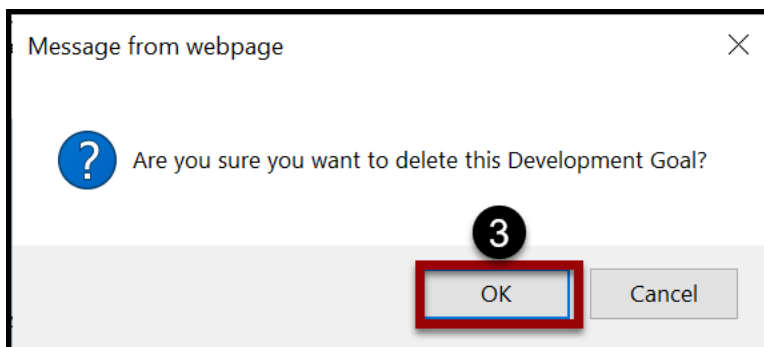


Task C. Delete a Goal

1. Select the **Goal Action** menu next to the goal you wish to delete.
2. From the options that display, choose **Delete development goal**.

Short-Term (0 - 1 Year)	Estimated Cost	Actual Cost	Expected Outcome	Competencies	Goal Start Date	Status	Action
1.1 Learn TMS Edit					10/01/2019	In Progress	 Edit development goal Add Development Goal in Employee Profile View development goal detail Delete development goal

3. Select **OK**.






Task D. Verify/Update Goal Learning Activities

Next, it is important to verify and/or update the learning activity or activities copied for each goal.

- **Edit Learning Activity**

1. To edit a learning activity, select the **edit** (pencil icon) next to the learning activity that needs to be changed.

Short-Term (0 - 1 Year)				
#	Goal Name	Estimated Cost	Actual Cost	Expected Outcome
1.1	Learn TMS			Edit
Learning Activities				
Learning Activity Name	Cost	Status	Completed Date	Action
Learned How to Login  1		Completed*	10/23/2020	⋮

2. Change any field needed to update the learning activity.

Note: All fields that are required will be marked with a red asterisk (*).

3. Select **Save**.

Edit Learning Activity ✕

▼ **Learning Activity Details** **2**


* Learning Activity Name

Description [Legal Scan](#)

Cost

* Status

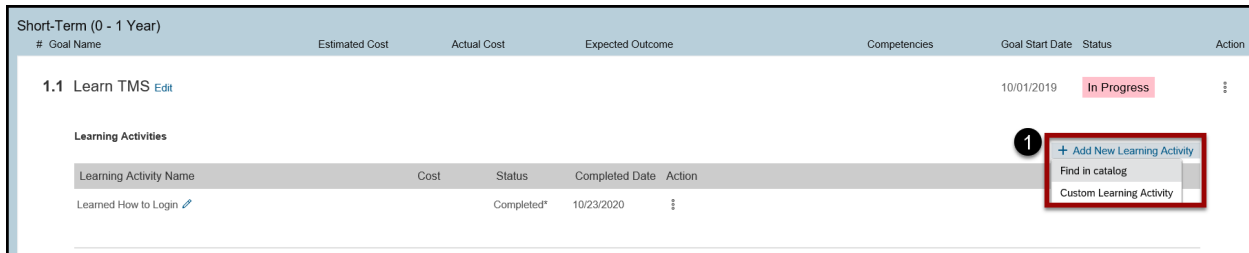
Additional Information

Completed Date 

3

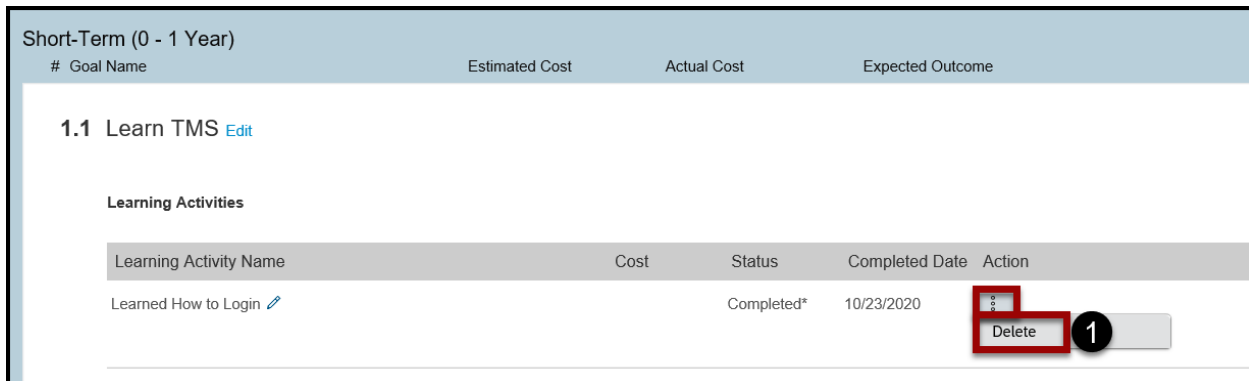
- **Add a Learning Activity**

1. New Learning Activities (from a catalog or custom) can be applied under a goal by selecting the **Add New Learning Activity** button.

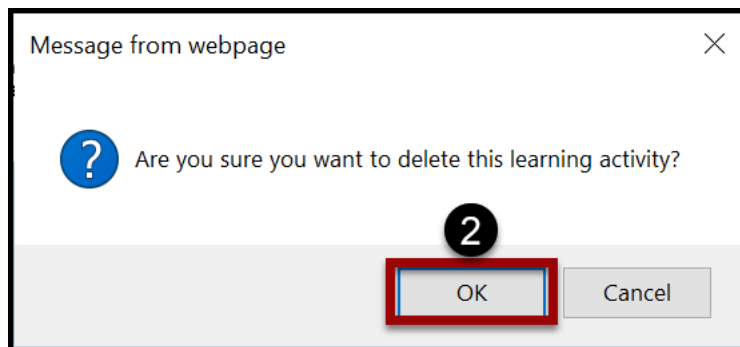


- **Delete a Learning Activity**

1. To delete a learning activity, select the **Goal Actions** button next to the learning activity that needs to be removed. Select **Delete**.



2. Select **OK**.



Congratulations! You have completed the task of copying and editing your goals from a prior fiscal year. When you complete your plan, email your manager to discuss your Development Plan.



Remember to return to the **My Development Plan** workspace to update your progress throughout the year. At the end of the fiscal year, return to **My Development Plan** to update your goal and custom learning activity status, with completion dates.

