

iLearn

Supervisor Guide

Recording your Team's Performance & Development Plans
(PDP)

Recording your Team's Performance & Development plans

This guide provides a general overview on how to record your team's Performance & Development Plans.

For	PDP Supervisor
Last Updated	June 2015 (Version 1.0)
Dashboard Button	PDP dash board – my team's plans
Department	NPSR, EHP

In this guide:

- Setting up your team's plans
 - Add a new staff member Pages 4 & 5
 - Remove a staff member Page 6
- Recording a staff member's PDP plan details Page 7 & 8
- Enter the date of the Mid-Point Review conversation Pages 9 & 10
- Closing off a team member's PDP plan Pages 11 & 12

Important Notice:

PD&P dates that were entered into ASK have been loaded into iLearn.

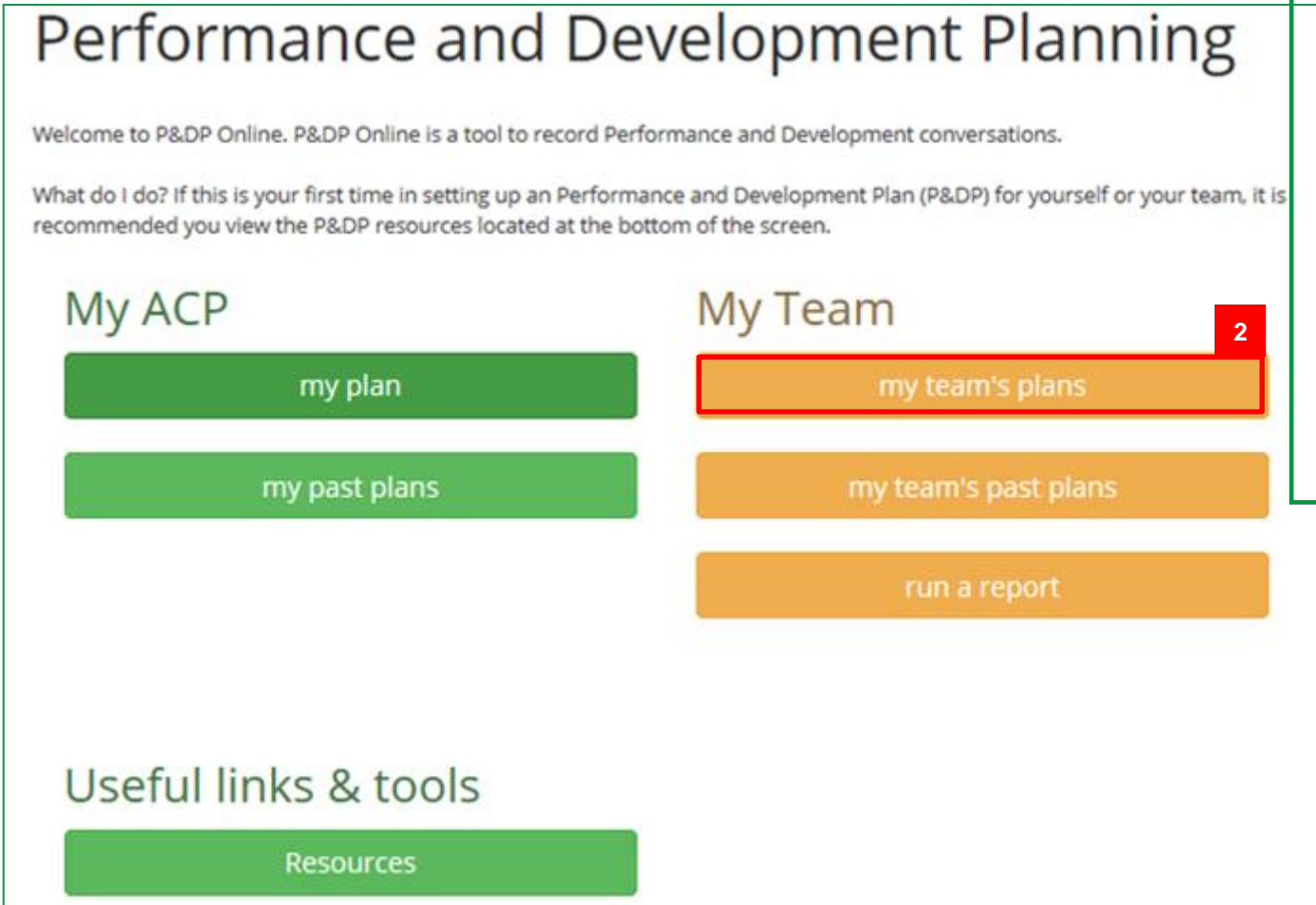
If you are updating a current plan go to Pages 9 & 10

If you are creating a new P&DP entry for a new employee go to Pages 7 & 8



1

To view your team's PDPs first click 'My PDP' from the iLearn home page.



2

Click on 'my team's plans'.
You can view who is in your team and the status of their plans, all in one screen.

TIPS

If you are unable to see the 'My Team' section contact the iLearn support team to set-up your access.
From the menu button '☰' select 'iLearn Support'. You can submit the request using the 'Submit Support Ticket' link located on the left hand side of the screen.

Add a team member

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My Team's Plans

Team Member	Current Plan Status	Action Required	Progress	
Account, Learner learner.account@communitites.qld.gov.au	In Progress Mid Point Review Due: 09/06/2014 Closing Review Due: 08/12/2014	Mid Point Review Overdue Review & Approve Development	Plan Details Development Print Plan	✕ Remove Team Member
Administrator, Content Content.Administrator@communitites.qld.gov.au	Not Recorded	Enter plan details	Plan Details Development Print Plan	✕ Remove Team Member

3 [+ Add Team Member](#)

TIPS

Creating a Team

iLearn allows for the option of a central officer to be tasked with the recording / updating of P&DP for a group of employees rather than the necessity for individual managers to be allocated with this task.

A role can be allocated to specific users to enable them to create teams, update P&DP information and run reports on behalf of Senior Management.

3

To add a team member, click 'Add team member'.

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My Team's Plans

Team Member

Current Plan Status

No team members recorded

[+ Add Team Member](#)

[View Past Templates](#)

Add Team Member

Search by last name :

citizen

Search

4

*Citizen, Lola (Lola.Citizen@communitites.qld.gov.au)

5

Update Team

6

Can't find your team member? [Submit an iLearn support request now](#)

TIPS

Note:

A notification email will be sent to the team member to advise they have been added to your team.

If your team member is already attached to a manager, the manager will also receive an e-mail advising them of the change.

4

In the search field enter your team member's surname and click **'Search'**.

5

Click the **'radio button'** beside their name.

6

Click **'Update Team'**.

Remove a Team member

My Team's Plans

Team Member	Current Plan Status	Action Required	Progress	
Account, Leamer	In Progress Mid Point Review Due: 09/06/2014 Closing Review Due: 08/12/2014	Mid Point Review Overdue Review & Approve Development	Plan Details Development Print Plan	✕ Remove Team Member 7

7

To remove a team member from your list, click the 'Remove Team Member' button. A pop up window will appear.

Remove a Team Member

By removing Lola Citizen you will no longer be able to view Lola's plans

Are you sure?

Yes No 8

8

Click 'Yes' to remove then press 'Submit'.

TIPS

A notification email will be sent to the team member to advise that you are no longer their P&DP supervisor.

Record your team members' plan details – To be used for new staff who do not currently have a P&DP in place.

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My Team's Plans

Team Member	Current Plan Status	Action Required	Progress	
Administrator, Content Content.Administrator@communitites.qld.gov.au	Not Recorded	Enter plan details	Plan Details Development Print Plan	✕ Remove Team Member
Citizen, Lola Lola.Citizen@communitites.qld.gov.au	In Progress Mid Point Review Held: 24/07/2015 Closing Review Due: 22/01/2016	9	Plan Details Development Print Plan	✕ Remove Team Member

[+ Add Team Member](#) [View Past Templates](#)

9

To record the details of a team member's plan, click the 'Plan Details' link under the 'Progress' column. A pop up window will appear.

Plan Details

Plan for: Lola Citizen

Plan type: Standard 10

Select 'Standard' unless the team member is on probation

Plan start date: 22/01/2015 11

Duration: 12 months 12

The duration of a Standard plan is normally 12 months.
The duration of a Probation plan depends on the team member's role - see departmental policy for more information

Due Date of Mid Point Review Conversation: 22/07/2015

Due Date of Closing Review Conversation: 21/01/2016

Close
Start Plan 13

10
Select 'Standard' as the plan type unless the team member is undergoing induction/probation.

11
Enter the 'start date' of the plan.

12
Select the timeframe for the plan (normally this is 12 months).

13
Click 'Start Plan'. A pop-up box will appear.

14
Click 'Start Plan'. The information will populate in the 'My Team's Plans' screen.

TIPS
The start date will default to the date created and the review dates will automatically update.
NOTE: If you change the start date and/or the duration the review dates will automatically calculate.

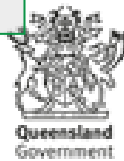
Plan Details

The plan details for Lola Citizen are about to be saved

The plan will automatically include any development activities from Lola's previous plan that were in progress, not started, or further development was required

Lola will be emailed, prompting them to record their development. You will receive an email notifying you when this has been completed.

Start Plan 14



Enter the date of the Mid Point Review conversation – This enable you to update P&DP information that is already recorded in the system.

You should meet with your team members to review their P&DP halfway through the plan (known as the Mid-Point Review). You need to record the date of this conversation in the plan details.

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My Team's Plans

Team Member	Current Plan Status	Action Required	Progress	
Administrator, Content Content.Administrator@communitites.qld.gov.au	In Progress Mid Point Review Due: 22/07/2015 Closing Review Due: 21/01/2016	15	Plan Details Development Print Plan	✕ Remove Team Member
Citizen, Lola Lola.Citizen@communitites.qld.gov.au	In Progress Mid Point Review Held: 24/07/2015 Closing Review Due: 22/01/2016		Plan Details Development Print Plan	✕ Remove Team Member

[+ Add Team Member](#) [View Past Templates](#)

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From the 'My Team's Plans' screen, click the 'Plan Details' link beside the team member's name.

Enter the date of the Mid Point Review conversation continued

Plan Details

Plan for: Content Administrator
Manager Account

Plan type: Standard

Plan start date: 22/01/2015

Duration: 12 months

Due Date of Mid Point Review Conversation: 22/07/2015

Date of Mid Point Review Conversation: 16

Due Date of Closing Review Conversation: 21/01/2016

Date of Closing Review Conversation:

Close Update Plan 17

16

Enter the actual date of the 'Mid Point Review' conversation.

TIPS

IMPORTANT: You will need to ensure a Midpoint Review date is entered in this field. Leaving this field blank prevents you from entering the Closing Review date.

17

Click 'Update Plan'.

Closing off a team member's PDP

When you have met with your team member to complete a final review of their PDP, you need to record the date of the conversation in PDP online. You can then close off the plan.

Plan Details

Plan for: Content Administrator

Current supervisor: Manager Account

Plan type: Standard

Plan start date: 22/01/2015

Duration: 12 months

Due Date of Mid Point Review Conversation: 22/07/2015

Date of Mid Point Review Conversation: 23/07/2015

Due Date of Closing Review Conversation: 21/01/2016

Date of Closing Review Conversation: 18/01/2016

Close Close Off Plan

18

Enter the actual date of the 'Closing Review Conversation' here.

19

To close off the plan press the 'Close Off Plan' button. A pop up window will appear.

TIPS

IMPORTANT: Closing off a current plan will automatically create a new plan with a start date that follows off from the close off date.

Closing off a team member's PDP continued

The screenshot shows a 'Plan Details' dialog box with the following text: 'You are about to close off Content Administrator's plan, ready to start a new plan. Are you sure?'. At the bottom right of the dialog, there are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box and the number '20'.

Team Member	Status	Actions
Administrator, Content Content.Administrator@communities.qld.gov.au	Not Recorded	Enter plan details Plan Details Development Print Plan Remove Team Member
Citizen, Lola Lola.Citizen@communities.qld.gov.au	In Progress Mid Point Review Held: 24/07/2015	Plan Details Development Print Plan Remove Team Member

20

Click the 'Yes' button.

The screenshot shows a 'Plan Details' dialog box with the following text: 'Lola Citizen's plan has been closed. You can return at any time to this page to view your team's past plans. To start a new plan for Lola Citizen or enter details for another team member, return to "my team's plans" on the dashboard.' At the bottom right of the dialog, there is a 'Close Window' button highlighted with a red box and the number '21'.

21

Select 'Close Window' to exit the message.

The closed plan will be archived and accessible via 'my team's past plans'.

You will be taken to the 'My Team's Past Plans' page.