

An Individual Development Plan (IDP) is a tool in Workday to assist with planning career and professional development in a measurable and meaningful way. IDPs should be used to help stretch and grow a team member beyond their current core job duties.

An IDP is an on-going activity and should be viewed as a partnership between the leader and team member to help develop and support performance.

This resource will guide the leader and team member on how to review, add notes and update progress of the Individual Development Plan in Workday.

If you are looking to implement the plan, please see the Individual Development Plan Implementation resource.

Review Development Plans: Goals and Items

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.

1. Go to the **team members profile** in Workday.
2. **Select Performance** from the menu on the left, from here you will see 4 tabs.

The screenshot shows the Workday interface for a team member profile. On the left, a blue sidebar contains a navigation menu with options: Summary, Job, Compensation, Absence, Pay, Contact, Personal, Performance, and Career. The 'Performance' option is highlighted, and a large orange arrow points to it. The main content area has a top navigation bar with five tabs: Individual Goals, Archived Goals, Competencies, Development Items, and Performance Reviews. Below the tabs, a list of items is displayed:

- **Individual Goals:** The Goal(s) from the submitted IDP are transferred to this tab.
- **Archived Goals:** Completed goals.
- **Competencies:** Rally House Core Competencies.
- **Development Items:** The Development Items from the submitted IDP are transferred to this tab.
- **Performance Reviews:** Any Performance Reviews assigned to the team member

View Edit and Add Development Items

Items can be updated to capture accomplishments and track progress for the plan. you can also create Development Items without having an IDP. This should be reviewed and updated each time the leader and team member meet to discuss the IDP.

1. Go to the **team members profile** in Workday.
2. **Select Performance** from the menu on the left, from here you will see 4 tabs.
3. **Select Development Items** tab; Any edits made to Development Items from a finalized/submitted IDP will not update the content in the original IDP form.
4. Click the **Pencil** icon to edit Development Items on your list. Use the **Remove** icon to delete Development Items from your dashboard.
 - a. Once a development item is removed from the My Development Items it cannot be recovered.
5. Click the **Add** button to create a new development item
6. Click the **Check** icon to save edits before navigating away from the screen.

The screenshot displays the Workday interface for a Team Member Sales Associate. The left sidebar is blue and contains a navigation menu with options: Summary, Job, Compensation, Absence, Pay, Contact, Personal, Performance (highlighted), and Career. The main content area is white and shows the 'Development Items' tab. At the top, there are tabs for Individual Goals, Archived Goals, Competencies, Development Items (selected), and Performance Reviews. Below the tabs, there is a 'Development Item' card with a red star icon and a pencil icon. The card title is 'Increasing Efficiency'. Underneath, there is an 'Additional Information' section with a text area containing the text: 'Overall, a major area of improvement that I need to make is in my efficiency with tasks. I would consider myself having good efficiency and to set the example for staff to follow. Those tasks include processing shipment, transfers, cycle counts, customer orders, and sect'. Below this is a 'Skills to Develop' section. The 'Status' is 'In Progress' and the 'Category' is 'Skill Enhancement'. The 'Start Date' is '09/08/2024' and the 'Completion Date' is '03/08/2025'. There is a 'Status Note' section with the text: '... has been working on his productivity, time efficiency. He has taken the lead on helping our new hires settle in and get acquainted'. At the bottom of the card is an 'Add' button.