

Working with Your Direct Report's IDP in E-Track

(Revised 2/20)

ACCESS YOUR DIRECT REPORT'S IDP:

1. Log into E-Track (<https://e-track.teds.com/Everyone/TEDEveryOne.jsp>) and switch to "Manage Direct Reports" login mode (A).
2. Click on the IDP tab (B) along the top of your screen and then the yellow "Development Plans" tab (C) on the resulting screen.
3. Select the underlined title of the direct report's IDP (D) with which you wish to work.

Dashboard | Activities | **IDP** | Catalogs | Profile

Christina Carter
Manage Direct Reports

Manage Performance

Action Alerts (0) | Analytics | **Development Plans (13)**

Manage Development Plans

Create | Select All | Deselect All

Current Development Plans

<input type="checkbox"/> Mikki Holmes	Mikki Holmes Staff IDP (Current) 0.00% Complete
<input type="checkbox"/> Kathy Kelley	Kathy Kelley Staff IDP (Current) 0.00% Complete

4. On the resulting screen, click on the yellow folder to the left of the direct report's underlined IDP title (E) to expand the IDP and see its individual objectives (F).

Dashboard | Activities | IDP | Catalogs | Profile

Christina Carter
Manage Direct Reports

I Want To:

- [Create a Development Plan](#)
- [Add Objective or Activity](#)
- [Close](#)
- [Delete](#)
- [Lock/Unlock Plans or Objectives](#)
- [Expand All Folders](#)
- [Collapse All Folders](#)
- [Manage Development Plans](#)

IDP

Kathy Kelley Staff IDP for Kathy Kelley

Objectives may only be added to Development Plans and Activities may only be added to Objectives.

<input type="checkbox"/>	Past Due	Print View	Title	Type
<input type="checkbox"/>			Kathy Kelley Staff IDP	Individual
<input type="checkbox"/>			116-04-005	Objective
<input type="checkbox"/>			201-02-009	Objective
<input type="checkbox"/>			201-02-012	Objective
<input type="checkbox"/>			201-03-006	Objective

REVIEW/EDIT DIRECT REPORT'S OBJECTIVE DETAILS:

5. Click on an underlined objective (F--previous page) to open it and edit the details as you see fit:

Definition

Objective Title * 201-02-009

Targeted Completion Date * 11/19/16 (m/d/yy)

Send Reminder 180 days prior to targeted completion date

Notify Supervisor

Description

Completion

BE SURE TO SAVE YOUR CHANGES BEFORE CLICKING ON THE ASSOCIATED COMPETENCY!

Contact Administrator November 24, 2014

6. **SAVE ANY EDITS YOU MAKE** to the objective details *PRIOR* to clicking on the linked competency at the bottom of the objective. The objective will automatically close after you save it. You will need to reopen it to proceed with exploring its associated competency in the next step.

LOCATE/ENROLL DIRECT REPORT IN INTERVENTIONS TO ADDRESS OBJECTIVES:

- Open the objective and click on the linked competency statement (G) underlined at the bottom of the objective details:

Completion

Competency

G

Associated Competency [201 - Adoption and Foster Care \(Topic\) / 201-02 Ability to determine the suitability of applicants to serve as various... \(Skill Set\) / 201-02-009 Knows how to use the family assessment to educate and prepare... \(Competency\)](#)

ber 24, 2014 Powered by

- On the resulting screen, review the list of Learning intervention "Suggestions" (H) and click on any of interest to see more details:

Competency Catalog

Competency Information for 201-02-009 Knows how to use the family assessment to educate and prepare prospective applicants for foster or adoptive parenting

Overview

Knows how to use the family assessment to educate and prepare prospective applicants for foster or adoptive parenting

General

i Once completed, completion never expires for this competency.

Local Code : **201-02-009**
Type : **Competency**
Status : **Active**
Difficulty : **0.00**
Time To Train : **0.00**

Requirements

No requirements.

H Suggestions

Title	Local Code
Family and Child Assessment (Assessor-Tier 1)	201-A1-S
(CW 6 hr) Assessing, Preparing, and Supporting Adoptive Parents who Care for...	201-2
(CW 6 hr) Wounded Child, Healing Home: The Impact of Parenting Traumatized...	201-3

9. If the learning intervention has sessions scheduled, you can click on “Enroll or View available dates for this Learning” (I) at the top of the left-side menu to review scheduled dates and locations for the learning (or skip to step 11 if you don’t see this option).

10. Click  to see more details about a scheduled session; click the ENROLL button to enroll a direct report in the session; or click  if none of the scheduled sessions suit your direct report’s schedule.

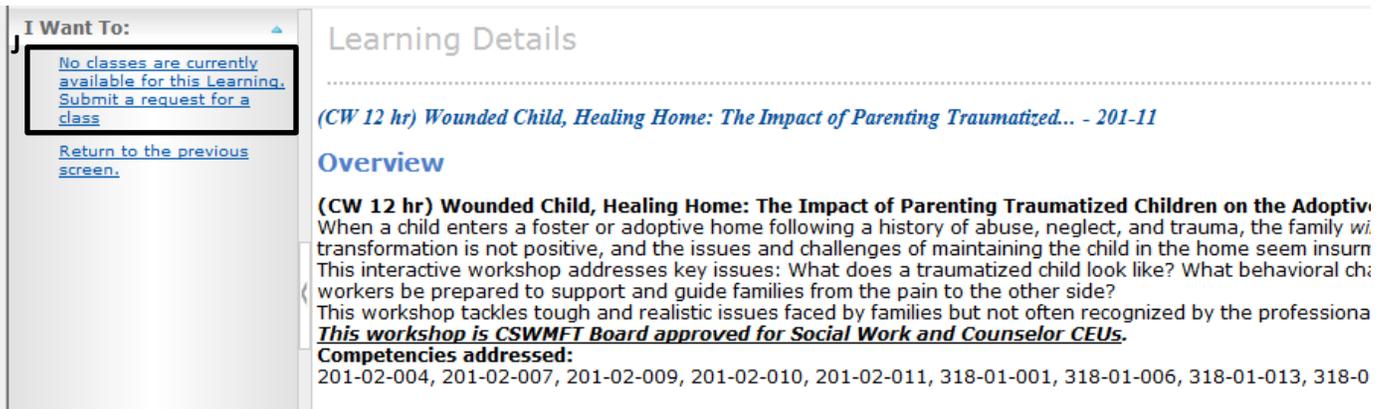
Family and Child Assessment (Assessor - Tier 1)

• Matching Sessions • All Available Sessions

	Code	Type	Start Date m/d/yyyy	End Date m/d/yyyy	Geographic County/Start Time	Hours	Availability	Regional Training Center
ENROLL	OCWT00EF2E		2/20/2020	2/21/2020	Greene - Multiple Times Defined	12.00	6 seats open	 WORTC (Greene)
ENROLL	OCWT00EC45		2/27/2020	2/28/2020	Franklin - Multiple Times Defined	12.00	Full - 2 on wait list	 CORTC (Franklin)
ENROLL	OCWT00E68E		3/12/2020	3/13/2020	Clermont - Multiple Times Defined	12.00	2 seats open	 SWORTC (Clermont)
ENROLL	OCWT00E86F		4/2/2020	4/3/2020	Cuyahoga - Multiple Times Defined	12.00	Full - 4 on wait list	 NCORTC (Cuyahoga)
ENROLL	OCWT00E423		4/8/2020	4/9/2020	Summit - Multiple Times Defined	12.00	1 seats open	 NEORTC (Summit)
ENROLL	OCWT00E54D		6/4/2020	6/5/2020	Greene - Multiple Times Defined	12.00	13 seats open	 WORTC (Greene)
ENROLL	OCWT00E99C		6/4/2020	6/5/2020	Franklin - Multiple Times Defined	12.00	16 seats open	 CORTC (Franklin)
ENROLL	OCWT00E474		6/11/2020	6/12/2020	Athens - Multiple Times Defined	12.00	17 seats open	 SEORTC (Athens)
ENROLL	OCWT00EBAB		8/5/2020	8/6/2020	Summit - Multiple Times Defined	12.00	24 seats open	 NEORTC (Summit)
ENROLL	OCWT00D806		8/5/2020	8/6/2020	Lucas - Multiple Times Defined	12.00	22 seats open	 NWORTC (Lucas)
ENROLL	OCWT00E99D		8/20/2020	8/21/2020	Franklin - Multiple Times Defined	12.00	25 seats open	 CORTC (Franklin)
ENROLL	OCWT00E6F8		8/31/2020	10/1/2020	Guernsey - Multiple Times Defined	12.00	20 seats open	 ECORTC (Guernsey)
ENROLL	OCWT00EBB7		9/30/2020	10/1/2020	Summit - Multiple Times Defined	12.00	24 seats open	 NEORTC (Summit)
ENROLL	OCWT00E99E		10/21/2020	10/22/2020	Franklin - Multiple Times Defined	12.00	25 seats open	 CORTC (Franklin)
ENROLL	OCWT00E6EB		12/3/2020	12/4/2020	Greene - Multiple Times Defined	12.00	18 seats open	 WORTC (Greene)
ENROLL	OCWT00E475		12/10/2020	12/11/2020	Athens - Multiple Times Defined	12.00	20 seats open	 SEORTC (Athens)

Request a New Session

11. If there are currently no scheduled sessions of this learning, you can click on “No classes are currently available for this Learning. Submit a request for a class” (J) at the top of the left-side menu (J) to request that a new offering of this learning intervention be scheduled to meet your direct report’s needs.



The screenshot shows a sidebar menu on the left with a dropdown menu open. The dropdown menu contains the text: "No classes are currently available for this Learning. Submit a request for a class" and a link "Return to the previous screen." The main content area is titled "Learning Details" and features a dotted line separator. Below the separator, the text reads: "(CW 12 hr) Wounded Child, Healing Home: The Impact of Parenting Traumatized... - 201-11". Underneath is a section titled "Overview" with a paragraph of text: "(CW 12 hr) Wounded Child, Healing Home: The Impact of Parenting Traumatized Children on the Adoptive... When a child enters a foster or adoptive home following a history of abuse, neglect, and trauma, the family wi... transformation is not positive, and the issues and challenges of maintaining the child in the home seem insurr... This interactive workshop addresses key issues: What does a traumatized child look like? What behavioral ch... workers be prepared to support and guide families from the pain to the other side? This workshop tackles tough and realistic issues faced by families but not often recognized by the professiona... ***This workshop is CSWMFT Board approved for Social Work and Counselor CEUs.*** Competencies addressed: 201-02-004, 201-02-007, 201-02-009, 201-02-010, 201-02-011, 318-01-001, 318-01-006, 318-01-013, 318-0

OTHER OPTIONS TO CONSIDER:

Sometimes your direct report has knowledge/skill development needs that require a custom-tailored solution like shadowing, coaching, or independent study of print or video resources. Here’s how to address those in an IDP:

SHADOWING:

You may want a direct report to build knowledge/skill by shadowing a more experienced individual. To capture this in a direct report’s IDP, simply open the corresponding IDP objective and note the shadowing plan in the objective’s “Description” box. Later, you can add details in the “Completion” box on how it was fulfilled (following earlier steps 1-6).

INDEPENDENT STUDY OF PRINTED, VIDEO, OR ONLINE RESOURCES:

You may want a direct report to review written or digital materials at his/her own pace (e.g., reading sections of the Field Guide to Child Welfare). To record this in an IDP, simply open the corresponding IDP objective and note the independent study/research plan in the objective’s “Description” box. Later, you can add details in the “Completion” box on how it was fulfilled (following earlier steps 1-6).

COACHING:

Coaching is a very effective way for individuals to master specific skills. To initiate a coaching intervention for your direct report, fill out the [Coaching Request Form](#) and submit to your Regional Training Center (RTC). If your RTC agrees that coaching is appropriate, you can record the details of the coaching plan in the appropriate objective’s “Description” box in that individual’s IDP (following steps 1-6 above). Later, you can add details in the “Completion” box on how the coaching plan was fulfilled (following earlier steps 1-6).

CLOSE AN OBJECTIVE IN A DIRECT REPORT'S IDP:

- When a direct report's knowledge/skill development need has been met, it is important to close the corresponding objective in his/her IDP. To do so, follow steps 1-4 above to locate and expand the individual's IDP.
- Check the box to the left of the objective you wish to close (K), click on "Close" in the left-side menu (L), then click "Close" a second time in the left-side menu of the resulting screen, and "OK" when prompted:

The screenshot shows the 'I Want To:' menu on the left with the 'Close' option highlighted. The main area displays the 'Kathy Kelley Staff IDP for Kathy Kelley' with a table of objectives. The objective '201-02-012' has a checked box next to it, labeled 'K'.

<input type="checkbox"/>	Past Due	Print View	Title
<input type="checkbox"/>			Kathy Kelley Staff IDP
<input type="checkbox"/>			116-04-005
<input type="checkbox"/>			201-02-009
<input checked="" type="checkbox"/>			201-02-012
<input type="checkbox"/>			201-03-006

ADD A NEW OBJECTIVE TO AN IDP:

Occasionally you may wish to add a new objective to an existing IDP to address a newly emerging agency or county initiative or a newly detected need for worker knowledge/skill development.

- Follow previous steps 1-3 to locate the individual's IDP.
- Check the box to the left of the underlined IDP title (M) and click "Add Objective or Activity" from the left-side menu (N).

The screenshot shows the 'I Want To:' menu on the left with the 'Add Objective or Activity' option highlighted. The main area displays the 'Kathy Kelley Staff IDP for Kathy Kelley' with a table of objectives. The IDP title 'Kathy Kelley Staff IDP' has a checked box next to it, labeled 'M'.

<input checked="" type="checkbox"/>	Past Due	Print View	Title
<input checked="" type="checkbox"/>			Kathy Kelley Staff IDP
<input type="checkbox"/>			116-04-005
<input type="checkbox"/>			201-02-009
<input type="checkbox"/>			201-02-012
<input type="checkbox"/>			

16. **OPTIONAL:** If the new objective is associated with a specific competency, on the resulting screen click “Associate Competency” (O) from the left-side menu. On the resulting screen, you will need to drill down (expand yellow folders) to the specific competency you wish to associate and click on the underlined title of that competency.
17. Complete the required detail fields and **SAVE** the objective:

I Want To: **O** Associate Competency
[Remove Competency](#)

IDP

Objective Details for Kathy Kelley

Definition

Objective Title *

Targeted Completion Date * (m/d/yy)

Send Reminder days prior to targeted completion date

Notify Supervisor

Description

Completion

You must at least give the objective a title and a targeted completion date. Everything else is optional.

BE SURE TO CLICK “SAVE” WHEN YOU ARE FINISHED.

18. **OPTIONAL:** Select the checkbox to the left of the objective and click “Lock/Unlock Plans or Objectives” from the left-side menu and “OK” when prompted. (This makes the individual objective’s details read-only for the individual.)