

# DEVELOPMENT PLAN

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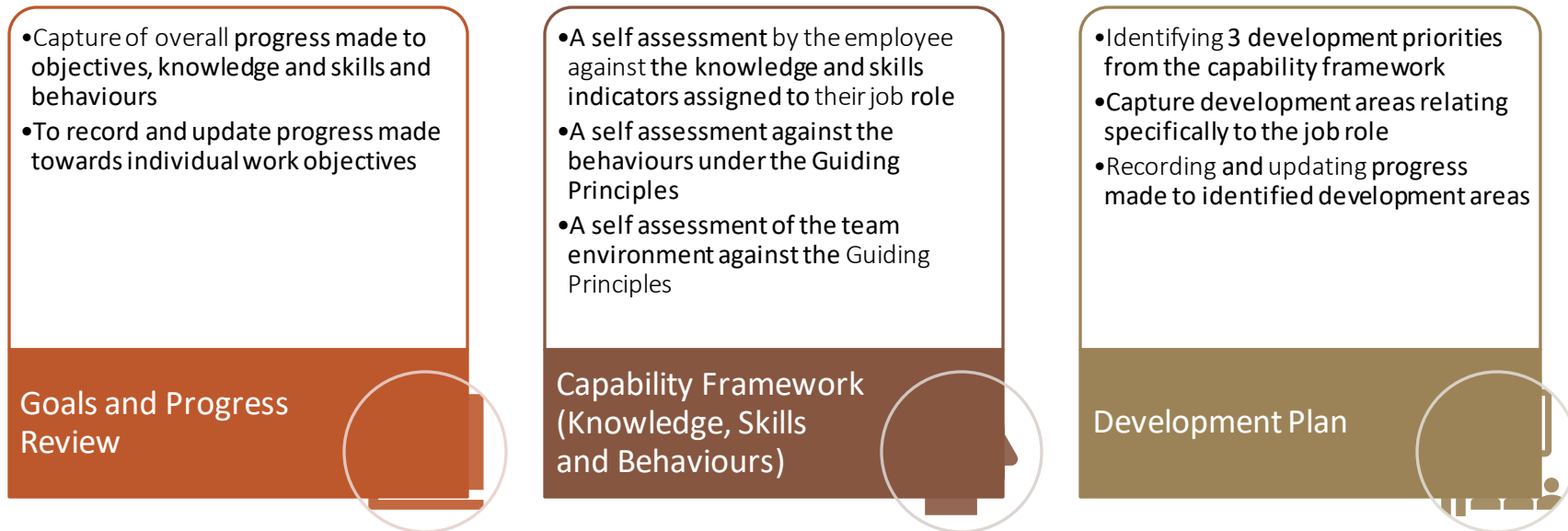
GUIDE FOR MANAGER



# Content

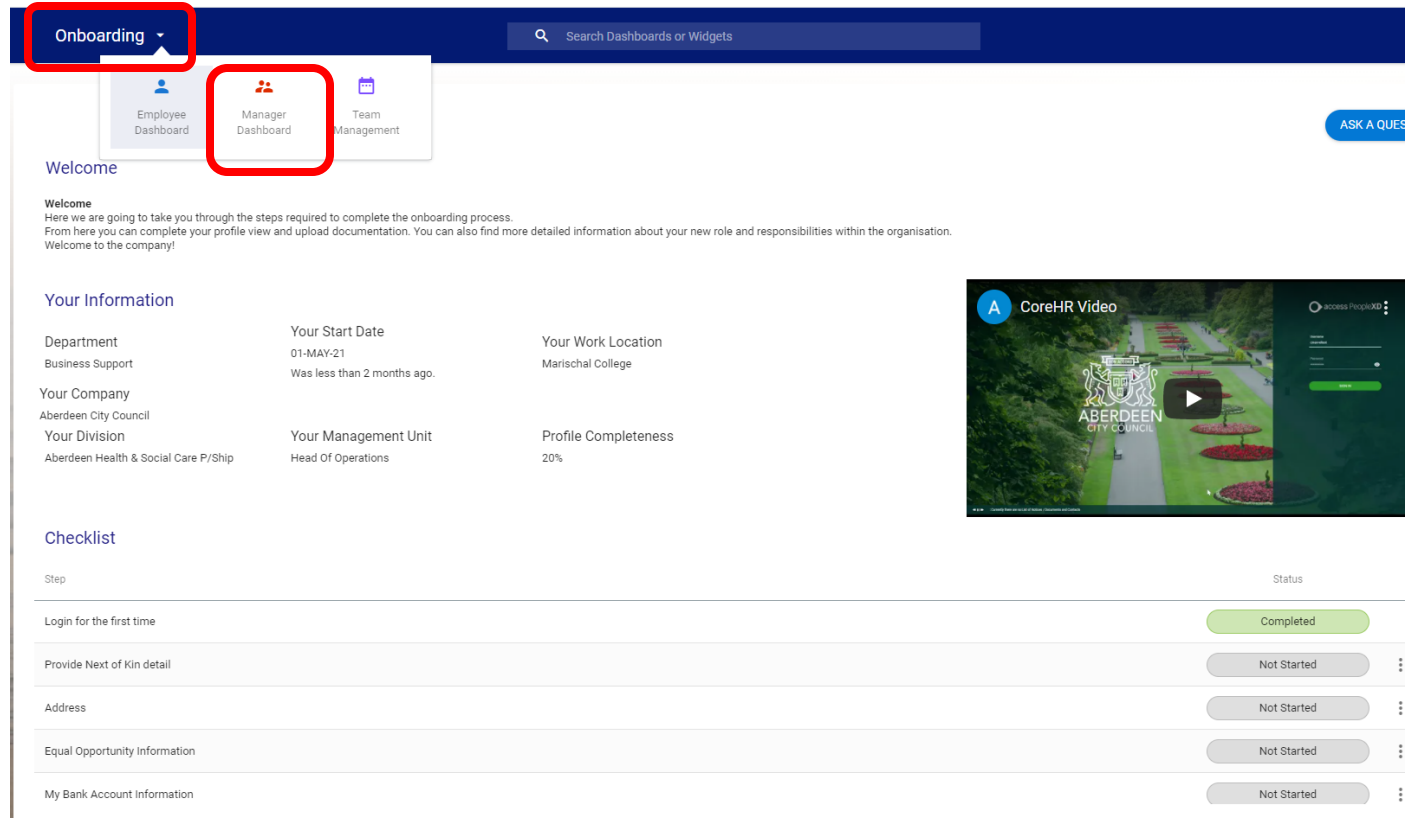
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CR&D's are made up of the following 3 key areas:



This guide will focus on the Development Plan section.

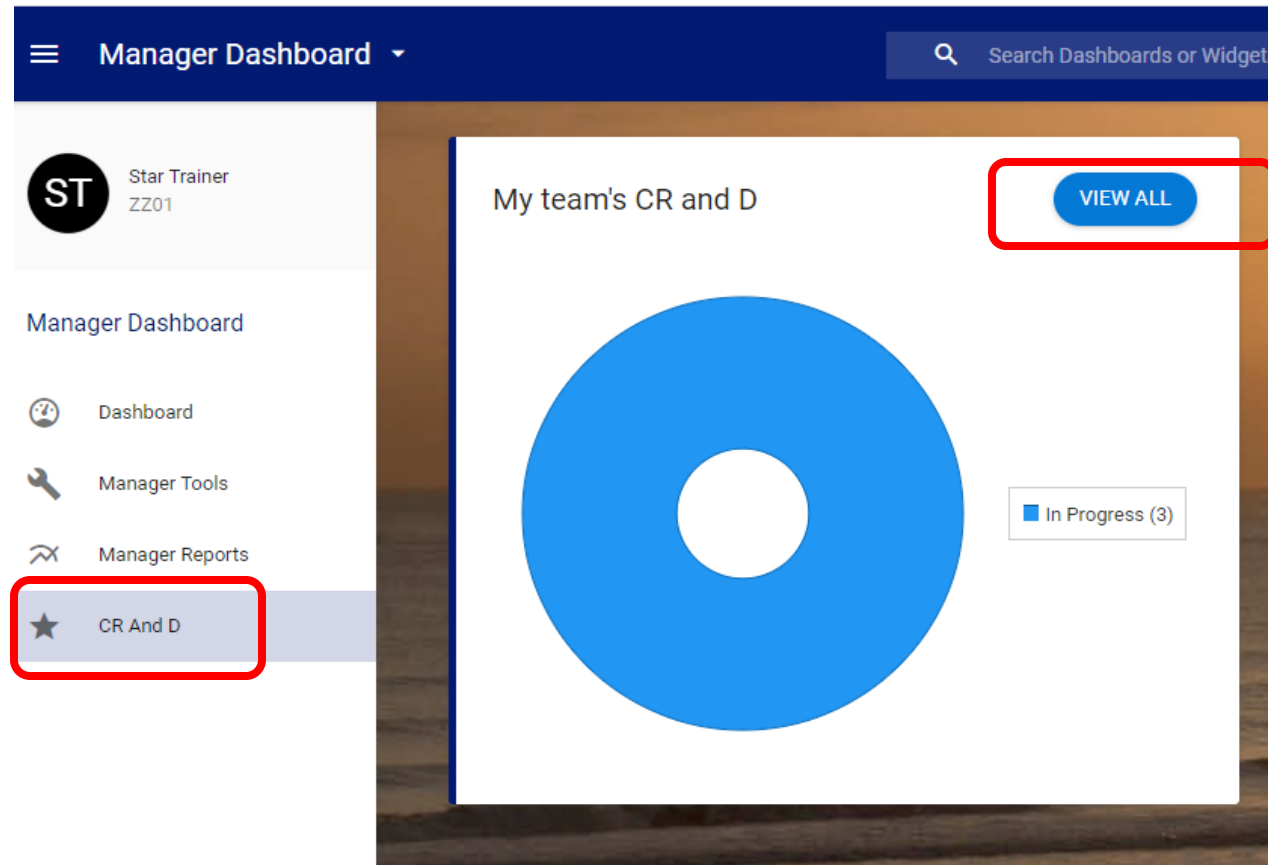
# Getting Started – Accessing CR&D



Once you're signed into CoreHR, **click on the dropdown arrow at the top left** of the screen next to the word 'Onboarding'.

Once the menu of modules appear, click on **Manager Dashboard**.

# CR&D



Once you're in the Managers Dashboard click on the **CR And D** option at the bottom left of the screen.

When the 'My Team's CR and D' window opens click on the **VIEW ALL** button.

# Access an Individuals Development Plan

Manager Dashboard

My Team Appraisals

Manager Dashboard > My Team Appraisals

Direct Appraisals Indirect Appraisals Calibration

Search by review name

All Appraisals	
Co Trainer Department Business Support	Appointment 502360-21 Job title Admin Assistant STEP 1 - Objectives and Progress Review 20... Objectives and Progress Review 2021/22 Awaiting Employee Action 01-Mar-2022 Stage Due Date
Co Trainer Department Business Support	Appointment 502360-21 Job title Admin Assistant STEP 2 - Capability Framework 2021/22 Capability Framework 2021/22 Awaiting Employee Action 01-Mar-2022 Stage Due Date
Co Trainer Department Business Support	Appointment 502360-21 Job title Admin Assistant STEP 3 - Development Plan 2021/22 Development Plan Awaiting Employee Action 01-Mar-2022 Stage Due Date

Launch

Print Review

To access the **Development Plan** section, click on the 3 dots to the right of the employee's development plan and select **Launch** from the list.

# Creating a new Development Plan

## STEP 3 - Development Plan 2021/22 (Co Trainer - 502360-21)

Manager Dashboard > My Team Appraisals > STEP 3 - Development Plan 2021/22 (Co Trainer - ...

ADD DEVELOPMENT

### DEVELOPMENT PLAN (01-MAR-2022)

Development Plan

Sign Off (1st March 2022)

### Development Plan

As well as the skills needed to achieve work objectives the development plan should also capture any skills and knowledge gaps identified in the Capability Framework. The plan should be kept live by transferring the top 3 priorities. Once these have been completed the next priorities should be added.

Search



Development Need	Description	Due Date	Created By	Status
Learn more about use of Microsoft teams	Learn about hosting live events	29-Oct-2021	Co Trainer	Developing
PECOS Training	Training on ACC Learn	01-Nov-2021	Star Trainer	Developing
Dealing with Difficult Situations training	Help me deal with conflict or difficult queries	09-Nov-2021	Co Trainer	Developing

To add a new development for your employee, click on the **ADD DEVELOPMENT** button in the top right hand corner

# Creating a new Development Plan

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You will then see this drop down box with the following fields:

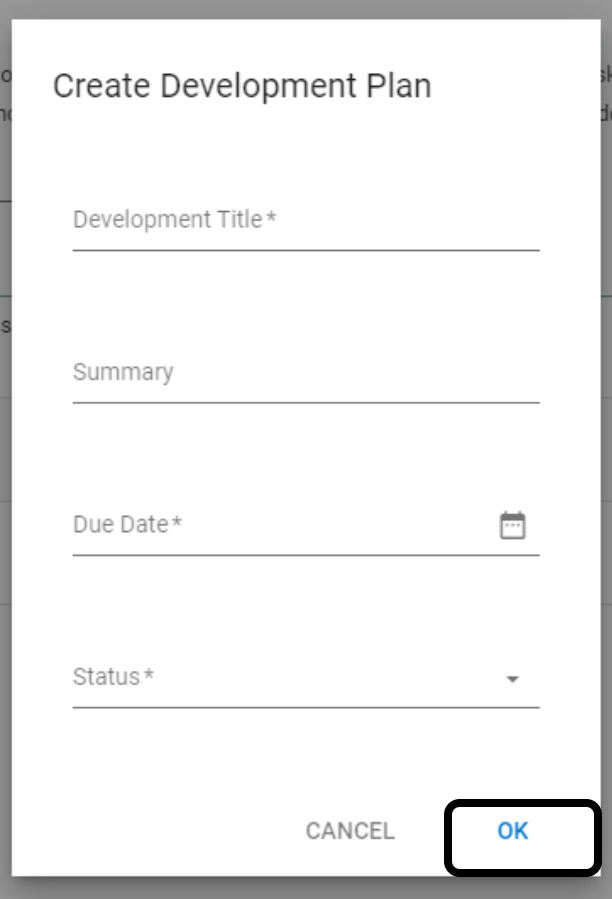
**Development title:** this is the development area that needs to be addressed e.g. presentation skills

**Summary:** this field is to capture how the development need will be met e.g. attend a workshop

**Due Date:** When this development needs to be achieved by

**Status:** A drop down box which allow progress to be recorded made against the development

Once you have entered all the information, click on **OK**.



The screenshot shows a dialog box titled "Create Development Plan". It contains four input fields: "Development Title\*" (a text field), "Summary" (a text field), "Due Date\*" (a date picker field with a calendar icon), and "Status\*" (a dropdown menu). At the bottom right, there are two buttons: "CANCEL" and "OK". The "OK" button is highlighted with a black border.

# Development Plan - Edit a Development Plan

The screenshot shows the 'My Team Appraisals' interface. At the top, there's a blue header with a back arrow and the text 'My Team Appraisals'. Below this, a light yellow banner contains 'STEP 3 - Development Plan 2021/22 (Co Trainer - 502360-21)' and an 'ADD DEVELOPMENT' button. A breadcrumb trail reads: 'Manager Dashboard > My Team Appraisals > STEP 3 - Development Plan 2021/22 (Co Trainer - ...)'. On the left, a sidebar shows 'DEVELOPMENT PLAN (01-MAR-2022)' with a sub-item 'Development Plan' and a 'Sign Off (1st March 2022)' button. The main area is titled 'Development Plan' and contains a table with columns: Development Need, Description, Due Date, Created By, and Status. The table has three rows. The second row, 'PECOS Training', is highlighted. A red box highlights the three-dot menu next to its 'Developing' status, which has opened a dropdown menu with options: Edit, Comments, and Delete.

Development Need	Description	Due Date	Created By	Status
Learn more about use of Microsoft teams	Learn about hosting live events	29-Oct-2021	Co Trainer	Developing
PECOS Training	Training on ACC Learn	01-Nov-2021	Star Trainer	Developing
Dealing with Difficult Situations training	Help me deal with conflict or difficult queries	09-Nov-2021	Co Trainer	Developing

Once you have added the development, it will appear in the development plan screen. You can edit this objective by clicking on the 3 dots against that specific development and choosing **Edit**.

Your employee may also have added developments but managers cannot edit these, only add comments



# Development Plan – Adding Comments

← My Team Appraisals

STEP 3 - Development Plan 2021/22 (Co Trainer - 502360-21)

Manager Dashboard > My Team Appraisals > STEP 3 - Development Plan 2021/22 (Co Trainer - ...)

ADD DEVELOPMENT

DEVELOPMENT PLAN (01-MAR-2022)

Development Plan

Sign Off (1st March 2022)

### Development Plan

no more the time needed to complete the development plan should be capped by time and the merge gaps between the developing elements. The plan should be kept live by transferring the top 3 priorities. Once these have been completed the next priorities should be added.

Search

Development Need	Description	Due Date	Created By	Status
Learn more about use of Microsoft teams	Learn about hosting live events	29-Oct-2021	Co Trainer	Developing
PECOS Training	Training on ACC Learn	01-Nov-2021	Star Trainer	Developing
Dealing with Difficult Situations training	Help me deal with conflict or difficult queries	09-Nov-2021	Co Trainer	Developing

Using the same method as the previous page on this guide, you can also add comments against developments by clicking on the 3 dots against that specific development and choosing **Comments**.

# Development Plan – Adding Comments

The screenshot displays a web application interface for a development plan. The top navigation bar is dark blue with a back arrow and the text 'STEP 3 - Development Plan 2021/22 (Co Trainer - 502360-21)'. A user profile icon 'ST' is in the top right. Below the header, a breadcrumb trail reads: 'Manager Dashboard > My Team Appraisals > STEP 3 - Development Plan 2021/22 (Co Trainer - ... > Comments'. A blue 'ADD COMMENT' button is highlighted with a red rectangle in the top right corner. The main content area features a table titled 'Comments' with columns 'Posted By', 'Comment', and 'Date'. One entry is visible: 'CT Co Trainer' posted 'Attended session from Digital Champs' on '07-Jun-2021 15:48'. A 'New Comment' modal is open in the center, containing a text input field labeled 'Comment \*' and 'CANCEL' and 'OK' buttons at the bottom.

Posted By	Comment	Date
CT Co Trainer	Attended session from Digital Champs	07-Jun-2021 15:48

You and your employee can post comments against the specific development and view a history of comments made.

# Development Plan – Sign Off

← My Team Appraisals

STEP 3 - Development Plan 2021/22 (Co Trainer - 502360-21)  
Manager Dashboard > My Team Appraisals > STEP 3 - Development Plan 2021/22 (Co Trainer - ...

DEVELOPMENT PLAN (01-MAR-2022)

Development Plan

Sign Off (1st March 2022)

Sign Off

Co Trainer

Star Trainer

Stage successfully signed off on 15-Jun-2021 Requires CoreHR password authentication

Date	Action	By
15-Jun-2021 13:50	Signed off	Co Trainer

access PeopleXD

SIGN OFF

SEND BACK

At the end of the CR&D cycle, you and your employee are required to sign off this section. The employee has to **Sign Off** first before the manager.

The **Send Back** button allows you to return the review to your employee for amendment, if required, before you sign off