



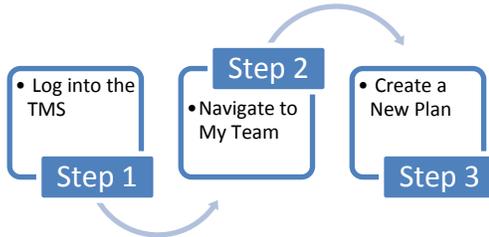
Create a HEAR Plan

ROLE: MANAGER

Purpose

This job aid is to guide managers through the step-by-step process of how to create a new plan.

Process Flow



Procedure

Step	Action															
<p>1. Log into the Talent Management System (TMS)</p> <div data-bbox="272 1150 574 1331" style="border: 1px solid blue; border-radius: 15px; background-color: #ffff00; padding: 5px; margin: 10px auto; width: fit-content;"> <p>1. Type your Username and Password</p> <p>2. Click Sign In</p> </div>	<ul style="list-style-type: none"> From any browser, type in https://talent.houstontx.gov. <div data-bbox="685 907 1295 940" style="border: 1px solid gray; padding: 2px;"> </div> <ul style="list-style-type: none"> The Talent Management System log in screen displays. Type in your Username and Password then click Sign In. <div data-bbox="685 1045 1068 1310" style="border: 1px solid gray; padding: 5px;"> </div> <ul style="list-style-type: none"> The homepage displays. 															
<p>2. Navigate to My Team</p> <div data-bbox="386 1747 581 1822" style="border: 1px solid blue; border-radius: 15px; background-color: #ffff00; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Click Plans</p> </div>	<ul style="list-style-type: none"> Click the My Team icon in the top main header. The Team Dashboard page displays. <div data-bbox="685 1478 938 1533" style="border: 1px solid gray; padding: 2px;"> </div> <ul style="list-style-type: none"> In the left navigation pane, click Plans. The Plans page displays. <div data-bbox="685 1600 1166 1894" style="border: 1px solid gray; padding: 5px;"> <table border="1" data-bbox="847 1642 1156 1717"> <thead> <tr> <th>Name</th> <th>Person Type</th> <th>Past Due</th> <th>Due Within 7 Days</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Employee One</td> <td>Active</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>Employee Two</td> <td>Active</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table> </div>	Name	Person Type	Past Due	Due Within 7 Days	Total	Employee One	Active	0	0	0	Employee Two	Active	0	0	0
Name	Person Type	Past Due	Due Within 7 Days	Total												
Employee One	Active	0	0	0												
Employee Two	Active	0	0	0												

Step	Action
------	--------

3. Create a New Plan

- In the **Direct Team Plans** section, click the **check box** to the left of the employee's name.

Click the **check box**

Plans

Tip: To create a plan for people in your team, select the required people and click the "Create Plan" button.

Direct Team Alternate Team

View by Person Type Activate Plan Create Plan Add Activity Reset

Direct Team Plans

Person Name	Person Type	Draft	Pending App...	Pending Ack...	Activated	Completed	Cancelled	Revision Requested	Actions
<input checked="" type="checkbox"/>	Employee One	Active	0	0	0	0	0	0	0
<input type="checkbox"/>	Employee Two	Active	0	0	0	0	0	0	0

Activate Plan Create Plan Add Activity Reset

- Click the **Create Plan** button.

Plans

Tip: To create a plan for people in your team, select the required people and click the "Create Plan" button.

Direct Team Alternate Team

View by Person Type Activate Plan Create Plan Add Activity Reset

Direct Team Plans

Person Name	Person Type	Draft	Pending App...	Pending Ack...	Activated	Completed	Cancelled	Revision Requested	Actions
<input checked="" type="checkbox"/>	Employee One	Active	0	0	0	0	0	0	0
<input type="checkbox"/>	Employee Two	Active	0	0	0	0	0	0	0

Activate Plan **Create Plan** Add Activity Reset

- The **Search for Plan Forms** dialog box displays. Click the **Search** button.

Search for Plan Forms

Plan Form Name Plan Type

Start Date <= Start Date >=

End Date <= End Date >=

Configure | Save Search Query

Click **Search**

- All available **Plan Forms** display. Click the **check box** to the left of the Plan Form Name then click the **Select** button.

**If the employee has direct reports, select the Supervisor/Manager plan; otherwise select the Employee plan.*

Plan Forms Modify Table

<input type="checkbox"/>	Plan Form Name	Start Date	End Date	Plan Type	Domain
<input type="checkbox"/>	2014-15 HEAR Performance Plan	07/01/2014	06/30/2015	Employee	world

- The confirmation message displays once the plan has been successfully added.

END OF PROCEDURE • RETURN TO TOP