COMPLETING THE INDIVIDUAL TRAINING NEEDS ASSESSMENT (ITNA) & DEVELOPMENT PLAN IN CAPS LMS

Steps for the Individual Being Assessed

Overview:

*There are **TWO distinct processes** all PCSA caseworkers and PCSA supervisors are required (per OAC 5180:2-33-55 and 5101:2-33-56) to complete in CAPS LMS to comply with OAC Rule: 1) **Completion of their assigned ITNA** in conjunction with their supervisor, and 2) **Creation of an individual development plan (IDP)** with their supervisor's input and approval. Instructions to complete both are included in this guide. It is important that you complete your mandated Core training before completing your first ITNA.*

Individual Training Needs Assessments (ITNAs) – known as competency assessment tasks in CAPS LMS -- are assigned every two years by DCY in CAPS LMS. You complete your assigned ITNA from your own perspective and your supervisor receives an assignment to provide their perspective on your learning needs. Once both perspectives are collected, you and your supervisor review and discuss the ITNA results and decide which recommended development actions are appropriate for you. You add those recommendations to the development plan to be created. Once created, you add objectives to the plan for any key practice areas you identified as needs in the ITNA, adjust plan timeframes as needed, and submit the plan for your supervisor's review and approval. The development plan guides your learning and is automatically updated as you complete learning interventions in CAPS LMS.

Contents:

1. Completing the Individual Training Needs Assessment (ITNA)

2. Reviewing Results with Your Supervisor

3. Creating Your Resulting Development Plan

4. Adding Key Practice Area Objectives and Finalizing Your Development Plan for Supervisor Approval

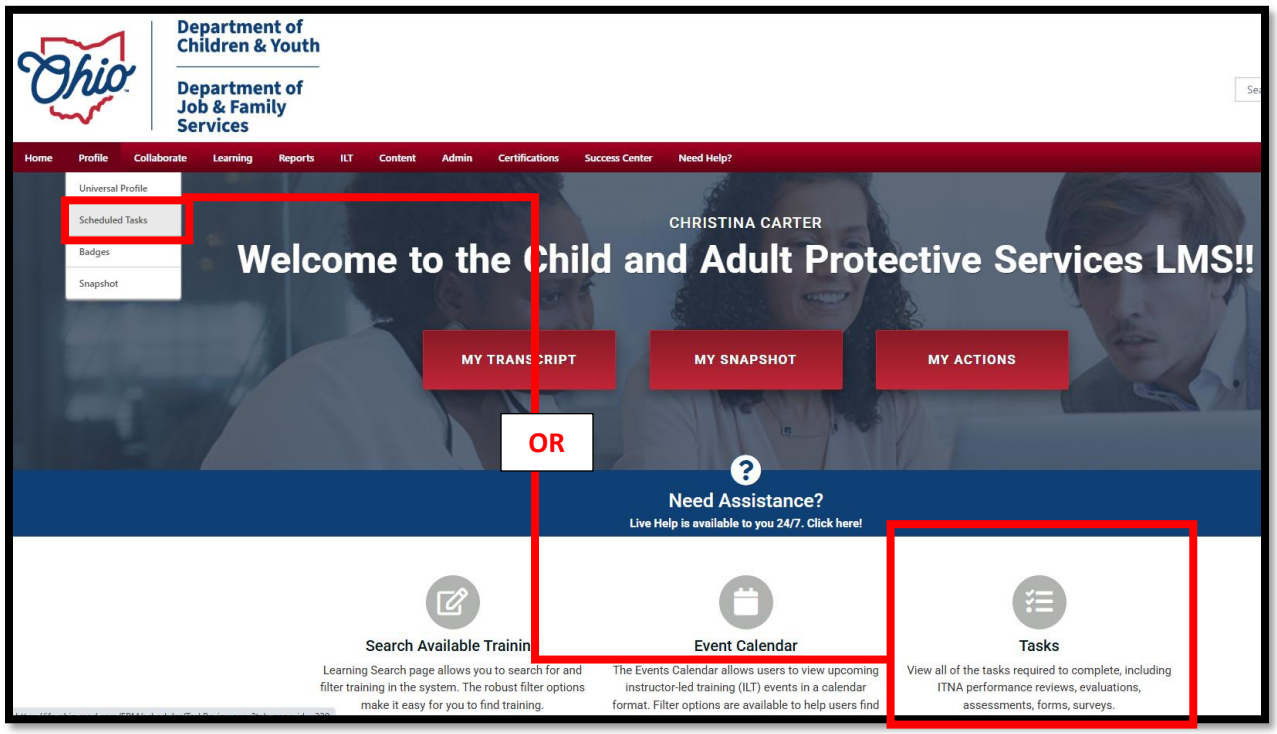
5. Working with Your Active Development Plan(s)

7. Technical Assistance Options

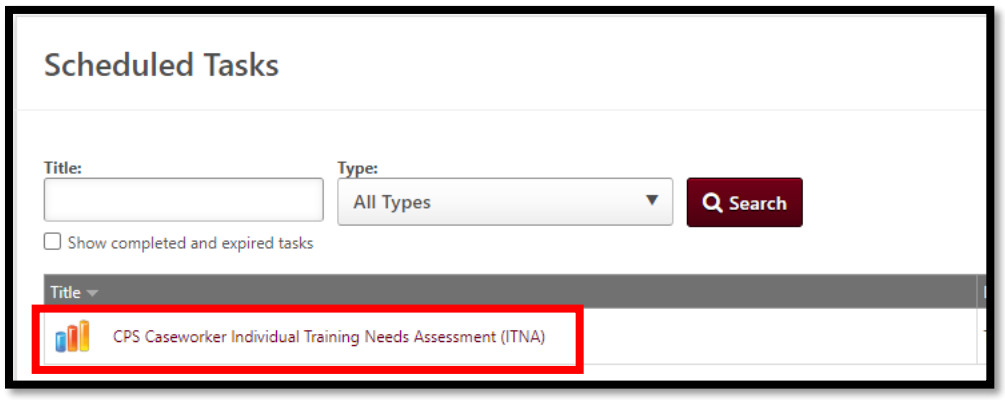
APPENDIX: Key Practice Area Search Criteria

1. COMPLETING THE INDIVIDUAL TRAINING NEEDS ASSESSMENT (ITNA)

To locate your assigned ITNA, select **Scheduled Tasks** from the **Profile** menu tab OR select the **Tasks** option on your **Welcome Page**:

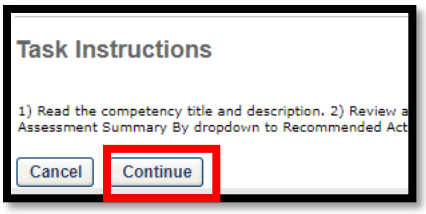


Select the title of your assigned ITNA:

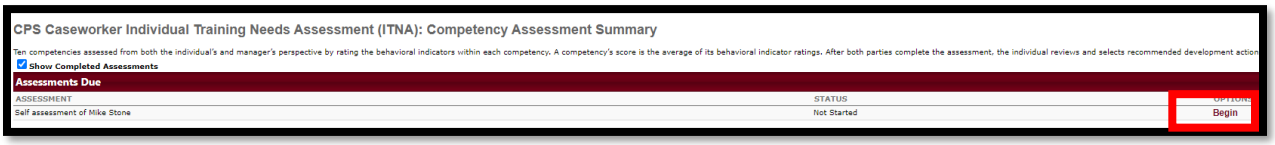


NOTE: If you do not see an assigned ITNA on the screen pictured above and you are a PCSA caseworker or supervisor, check the box to "show completed and expired tasks." If your task appears with expired status or is still not listed, contact capslms@childrenandyouth.ohio.gov. If you are a supervisor, you may see two assigned items—one for your own ITNA and one for your direct reports.

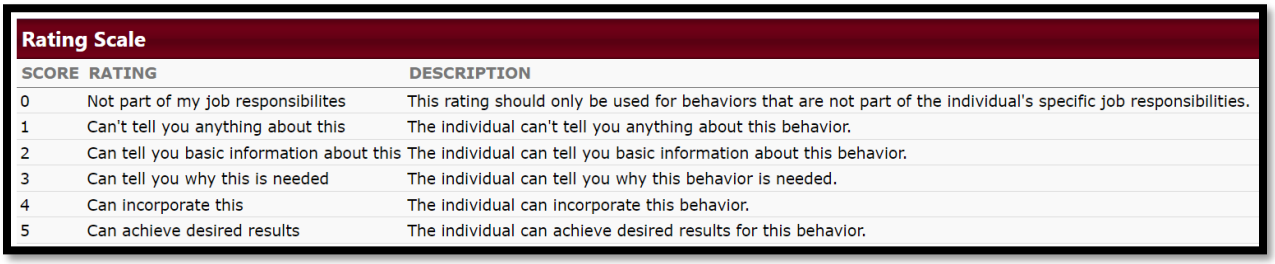
Review the task instructions and select **Continue**:



Select **Begin** to the far right of your ITNA:



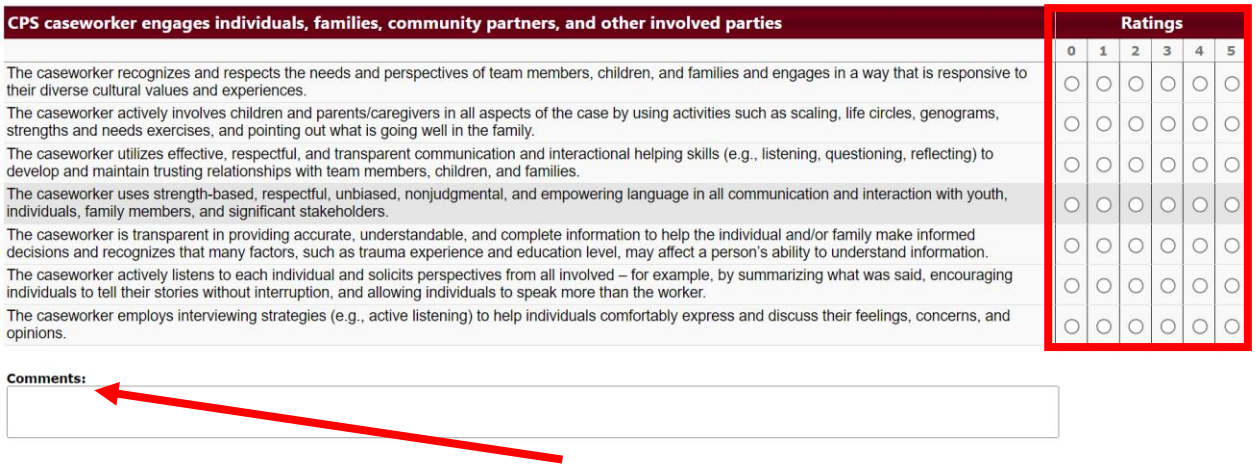
Review the **Rating Scale** you will use throughout the assessment (shown at the top of the assessment):



Rating Scale

SCORE	RATING	DESCRIPTION
0	Not part of my job responsibilites	This rating should only be used for behaviors that are not part of the individual's specific job responsibilities.
1	Can't tell you anything about this	The individual can't tell you anything about this behavior.
2	Can tell you basic information about this	The individual can tell you basic information about this behavior.
3	Can tell you why this is needed	The individual can tell you why this behavior is needed.
4	Can incorporate this	The individual can incorporate this behavior.
5	Can achieve desired results	The individual can achieve desired results for this behavior.

Review and rate each of the behavioral indicators listed under the ten competencies:



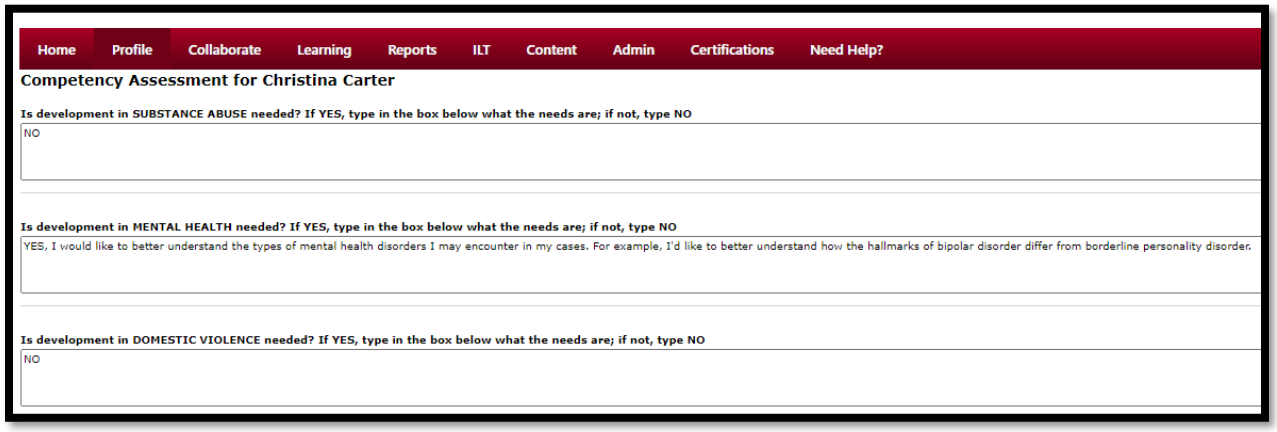
CPS caseworker engages individuals, families, community partners, and other involved parties	Ratings 0	1	2	3	4	5
The caseworker recognizes and respects the needs and perspectives of team members, children, and families and engages in a way that is responsive to their diverse cultural values and experiences.	○	○	○	○	○	○
The caseworker actively involves children and parents/caregivers in all aspects of the case by using activities such as scaling, life circles, genograms, strengths and needs exercises, and pointing out what is going well in the family.	○	○	○	○	○	○
The caseworker utilizes effective, respectful, and transparent communication and interactional helping skills (e.g., listening, questioning, reflecting) to develop and maintain trusting relationships with team members, children, and families.	○	○	○	○	○	○
The caseworker uses strength-based, respectful, unbiased, nonjudgmental, and empowering language in all communication and interaction with youth, individuals, family members, and significant stakeholders.	○	○	○	○	○	○
The caseworker is transparent in providing accurate, understandable, and complete information to help the individual and/or family make informed decisions and recognizes that many factors, such as trauma experience and education level, may affect a person's ability to understand information.	○	○	○	○	○	○
The caseworker actively listens to each individual and solicits perspectives from all involved – for example, by summarizing what was said, encouraging individuals to tell their stories without interruption, and allowing individuals to speak more than the worker.	○	○	○	○	○	○
The caseworker employs interviewing strategies (e.g., active listening) to help individuals comfortably express and discuss their feelings, concerns, and opinions.	○	○	○	○	○	○

Comments:

[OPTIONAL] Add context to your ratings by entering notes in the **Comments** box beneath each competency. NOTE: Comments are visible to both you and your supervisor.

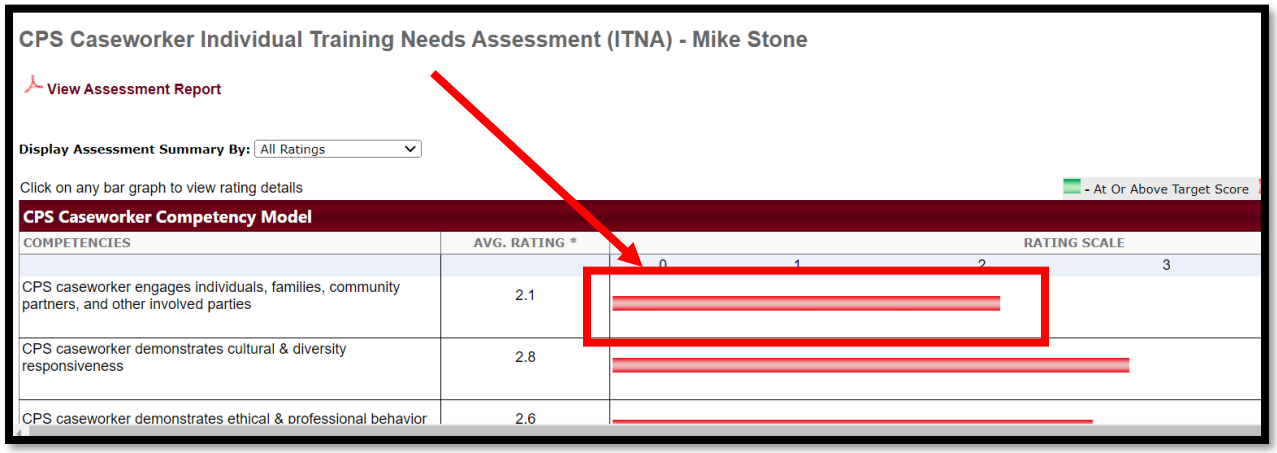
If needed, you can select **Save & Return** at the bottom to finish completing the assessment at another time. Otherwise, when finished rating all items, select **Continue** to proceed to the list of key-practice area questions:

The final part of the ITNA is a series of required questions to determine development needs in key practice areas. If the practice area is not a development need, type NO. If it is a development need, type YES along with a description (max 3500 characters) of your specific development needs in that area:

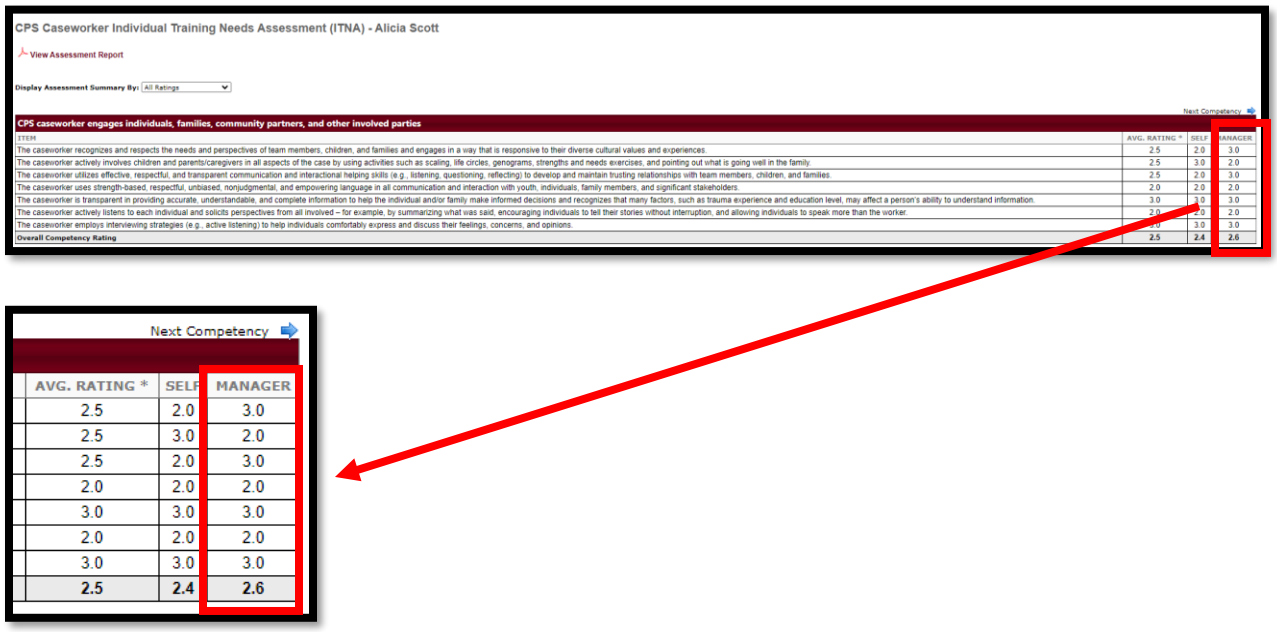


When you have answered all key-practice-area questions, select **Submit Assessment** to see your results:

To quickly determine whether your supervisor has completed their side, click on the first colored bar in your assessment results:

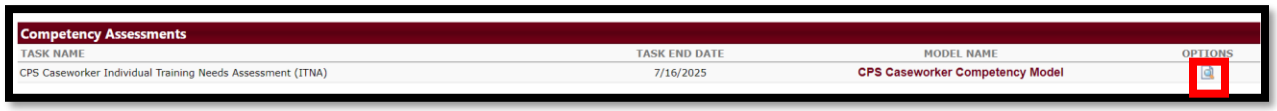


If you do not see a **Manager** rating column (see example below) included in the resulting detail screen, **STOP**. Your supervisor has not yet completed their side of your assessment:



Alert your supervisor that you have completed your side of the assessment and are waiting on their input to proceed. You will receive an email notification when both sides of your assessment are complete or you can check back periodically to see if the manager rating column now appears when selecting a colored bar from your assessment results.

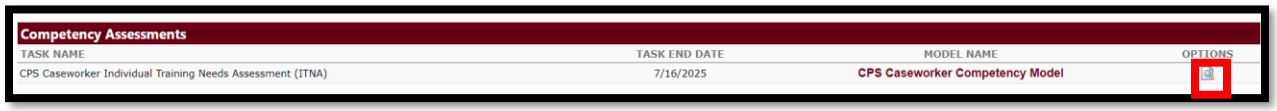
To return to your assessment results, select **Competency Assessment Summary** from your **Learning** menu. On the resulting screen, click the **View Details** icon (magnifying glass) under **Options** to the far right of your assessment title:



When your supervisor has completed their part, arrange a meeting time to discuss results and build your plan together. When ready, proceed to the next section.

2. REVIEWING RESULTS WITH YOUR SUPERVISOR

If not already on your competency assessment results screen, select **Competency Assessment Summary** from your **Learning** menu tab and select the **View icon** to the far right of your assessment name:



Select **View Assessment Report** at the top of your competency assessment results screen:

Save the report when prompted, then open and review it with your supervisor. NOTE: Your supervisor has the same ability to view your report by following the steps in their own instructions.

Your discussion may include your strengths and weaknesses, areas where you disagreed on ratings, review of contextual comments, etc.

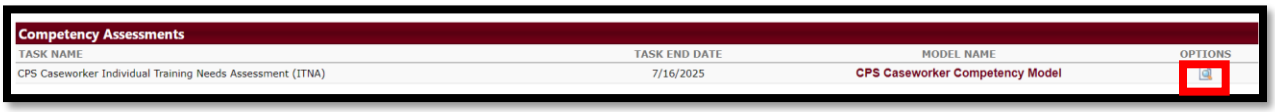
Make note of any key practice areas that you agreed are development needs. You may add objectives for these to your development plan in Step 4.

If you decide that an adjustment is needed to an overall rating, the adjustment is made by the supervisor (steps included in their instructions).

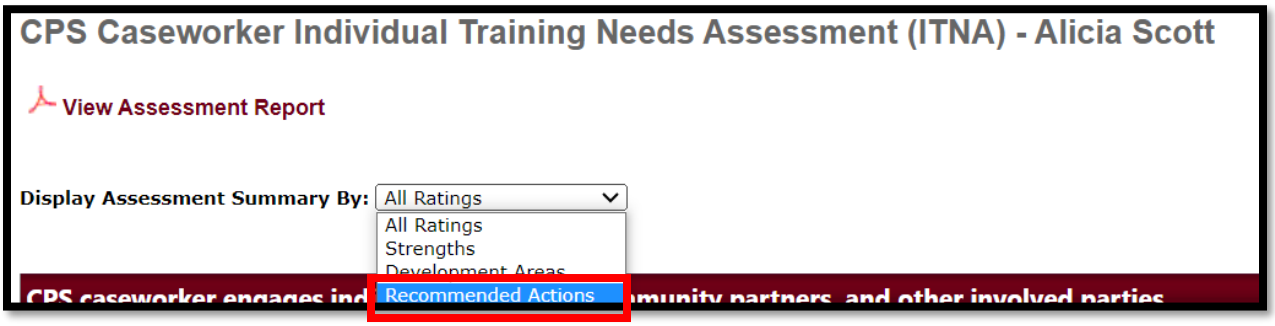
When finished discussing the results, you are ready to create your resulting development plan collaboratively with your supervisor.

3. CREATING YOUR DEVELOPMENT PLAN

Creation of your development plan begins from your competency assessment results screen, accessed by selecting **Competency Assessment Summary** from your **Learning** menu tab and then selecting the **View** icon to the right of your plan name under **Options**:



At the top of the resulting screen, change the **Display Assessment Summary By** dropdown to **Recommended Actions**:

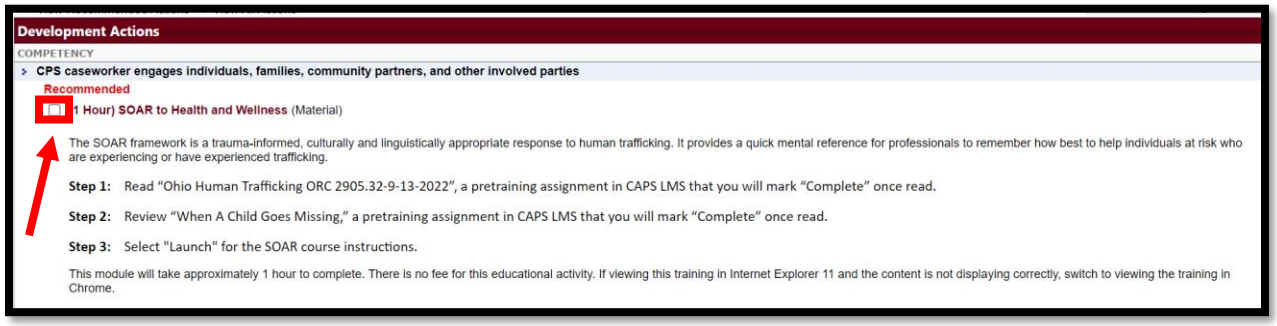


Recommended development actions (instructor-led training, self-directed courses, materials, videos, coaching) are listed under each competency, based on your assessment ratings. These are different options (not requirements) to increase knowledge and skill in a competency. Some will be more appropriate than others to meet your specific needs. For example, some of the courses may be part of

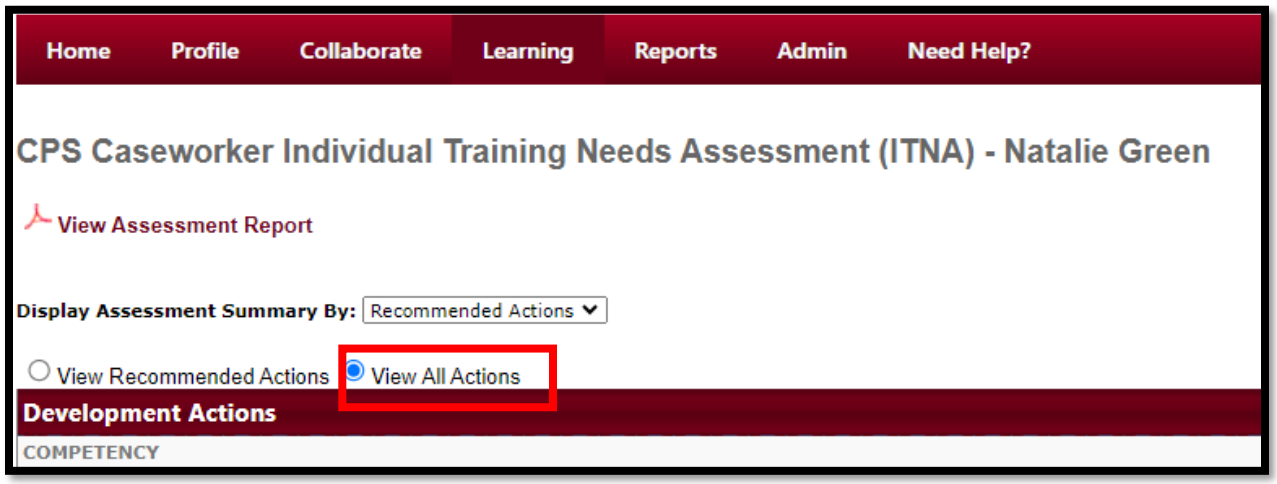
the OCWTP Caseworker or Supervisor Core 2.0 curriculum, intended for new staff but also appropriate as refresher courses. It is also important to note that some recommendations may not have current offerings scheduled.

The expectation is to select one or more of the options—not to take all of them. For example, you will see the coaching request form appear as an option if a competency was rated a 4 or 5. Coaching may be appropriate if you've already taken training and still feel you need assistance getting to skill. If so, you would add that item to your plan. If not, you would consider other options. Click on a recommended action's title to see more information about it in a new browser tab.

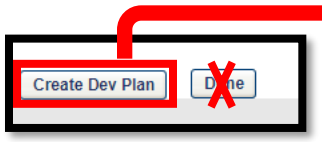
Review each competency's recommended development actions. Select those actions that you and your supervisor agree should be added to your development plan, using the checkboxes to the left of each. (Note: while the supervisor can see the recommendations, only the worker can select them.) Aim to select at least one item under each competency:



NOTE: If you feel there are not enough recommended actions listed for your competency ratings, scroll to the top of the list of recommended development actions and toggle from **View Recommended Actions** to **View All Actions** to see all development actions associated with that competency, regardless of scoring:



After you have reviewed all recommendations and made your selections, scroll to the bottom and select **Create Dev Plan**:



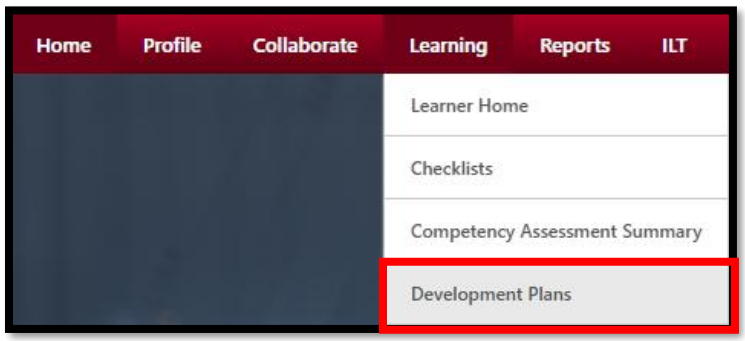
DO NOT select "Done." Doing so will erase selections not yet added to your plan. Select CREATE DEV PLAN when adding items.

On the next screen you will see green checkmarks to the left of all recommended development actions you've added to your development plan. If you wish to add more items to your development plan, continue checking boxes to the left of recommendations and then re-select **Create Dev Plan** at the bottom. Otherwise, select **Done** to exit without adding more items and proceed to step 4 to finalize your draft development plan.

You can re-use these instructions at any time to add more recommendations from your assessment results to your development plan.

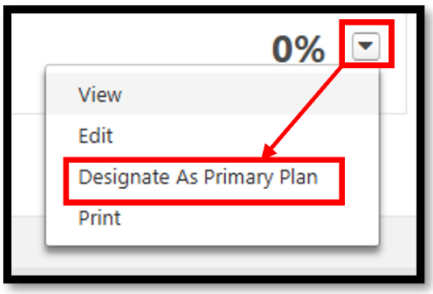
4. ADDING KEY PRACTICE AREA OBJECTIVES AND FINALIZING YOUR DEVELOPMENT PLAN FOR SUPERVISOR APPROVAL

Select **Development Plans** from the **Learning** menu tab:

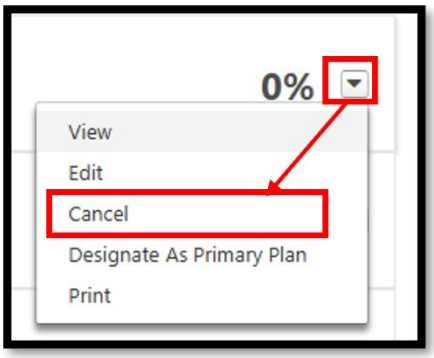


If you see more than one active development plan listed:

A) Ensure that the development plan you created in Step 3 appears as your "Primary Plan" at the top of your Development Plans page. If a previous plan is listed as your primary plan, scroll down to "Other Plans," select the dropdown arrow to the right of your new plan's name, and select "Designate as Primary Plan."

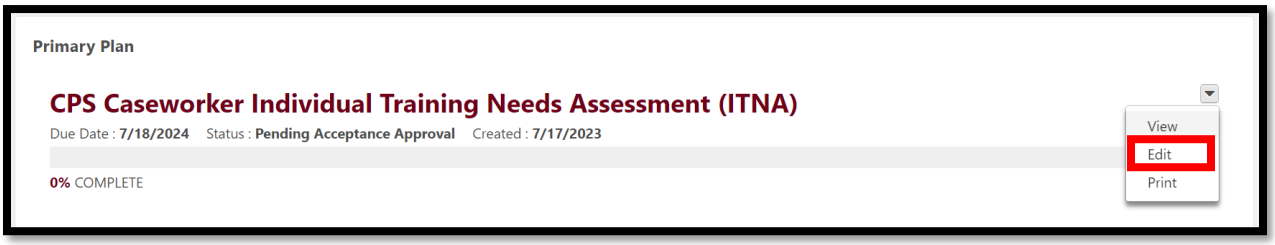


B) Once your new development plan is listed as your primary plan, we strongly recommend cancelling any other active development plans. To close an old plan, first view it carefully to ensure it is an old plan (and not your new plan) that you are cancelling. Once confirmed, select the dropdown arrow to the right of the old plan's title and select the "Cancel" option. Select "yes" when asked to confirm the cancellation request.



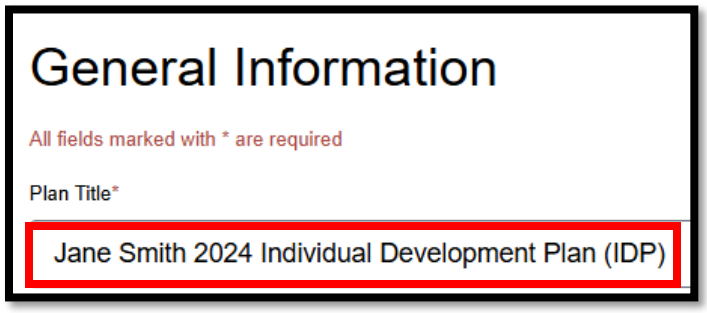
Once you've ensured the development plan you created in Step 3 is correctly listed as your Primary Plan and you have closed any other plans you wish to close, you are ready to proceed with the remaining steps to finalize your development plan for your supervisor's approval:

Select **Edit** from the dropdown to the right of your plan name:



RENAME YOUR PLAN

Rename your **Plan Title** as follows: [Your Name] [Year] Individual Development Plan (IDP):

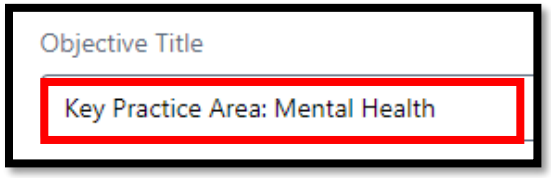


ADD KEY PRACTICE AREA OBJECTIVES

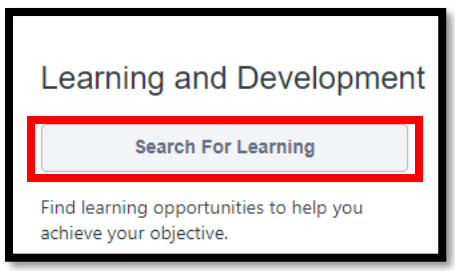
Before reviewing and adjusting the objectives and learning objects already in your plan, you'll first add objectives to represent any key practice areas you identified as development needs in the series of YES/NO questions on the final screen of your ITNA. These were noted in your **PDF Assessment Results Report** you downloaded in Step 2.

To add a key-practice-area objective, select **Add Objective** immediately beneath the **Development Objectives** heading:

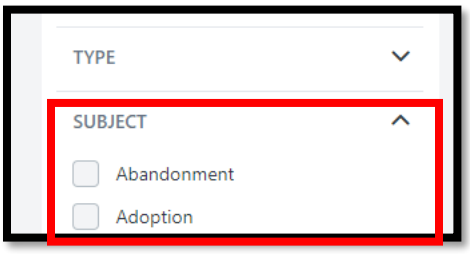
Add an **Objective Title** to match the identified key practice area:



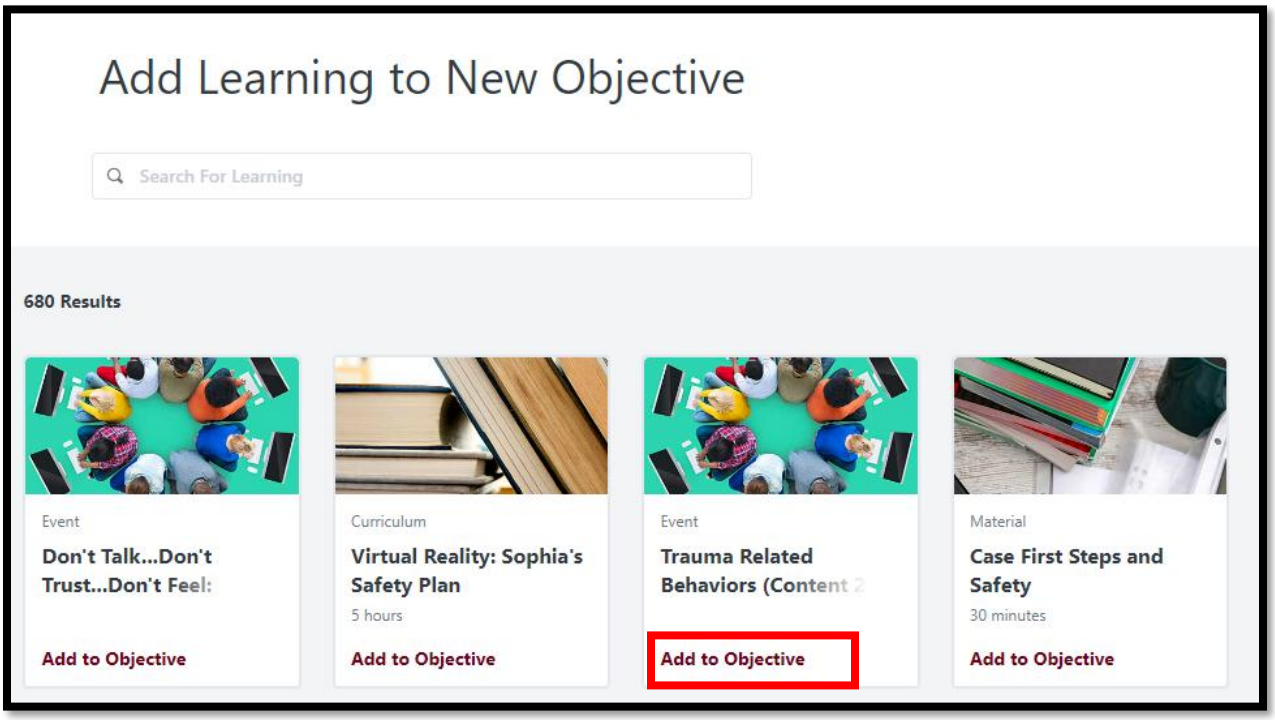
Select **Search for Learning** to search for learning activities to add to the objective:



Use the left-side **SUBJECT** search criteria to find learning activities (see APPENDIX for search criteria) in your key practice area:

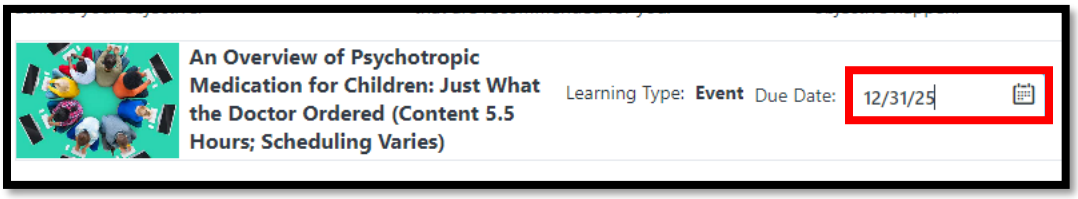


To add learning objects from search results to your plan, select **Add to Objective** at the bottom of the learning object tile:



When finished searching for or adding new actions, select **Return to Objective** at the bottom of your search results screen:

Adjust the **Due Dates** of the learning activities you added to match your two-year ITNA cycle end date. The system defaults to extending them for only a single year. Making this adjustment ensures you will receive timely reminders when your plan is due to expire, as your plan's end date becomes the farthest due date on any objective or action within the plan:



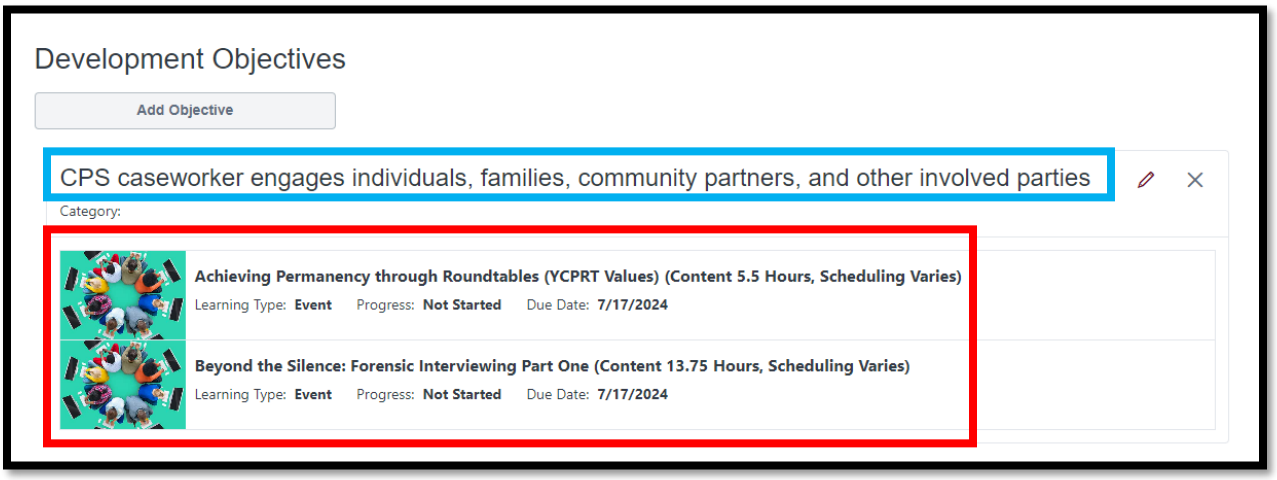
When finished adding learning activities and adjusting their due dates, select **Save and Return** to Plan at the bottom of the screen:

When finished adding objectives for key practice areas, follow the instructions below to review and adjust your plan's other objectives.

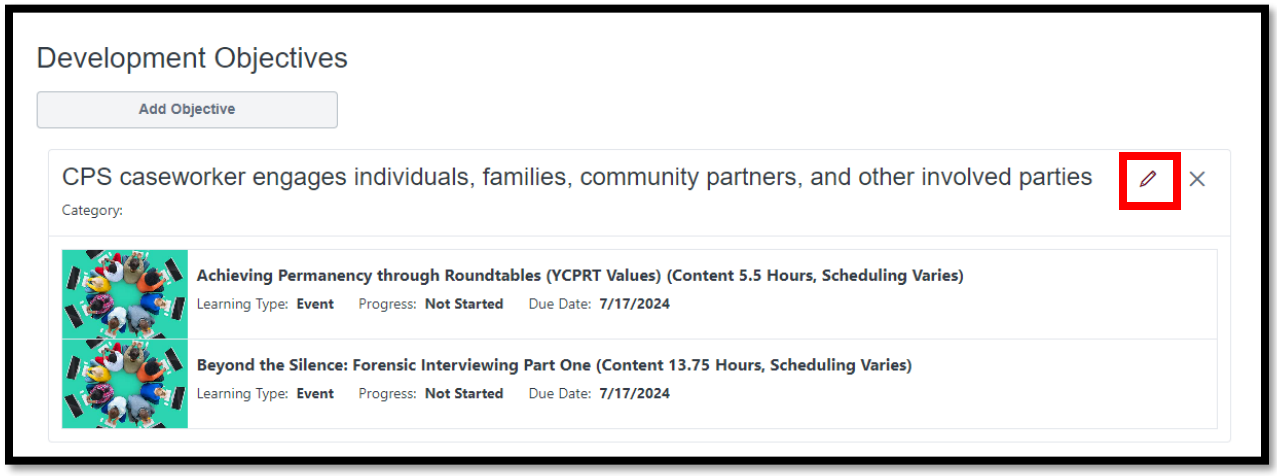
ADJUST OTHER OBJECTIVE DUE DATES AND LEARNING ACTIVITIES

It's important to adjust due dates in all objectives in your plan. You may also want to add or remove learning activities from your other plan objectives.

You will see already-created objectives in your plan for each competency area you noted as a development need in your ITNA (blue boxes below). The development actions you selected when reviewing your ITNA results will appear as learning activities under each of those competency-based objectives (red boxes below):

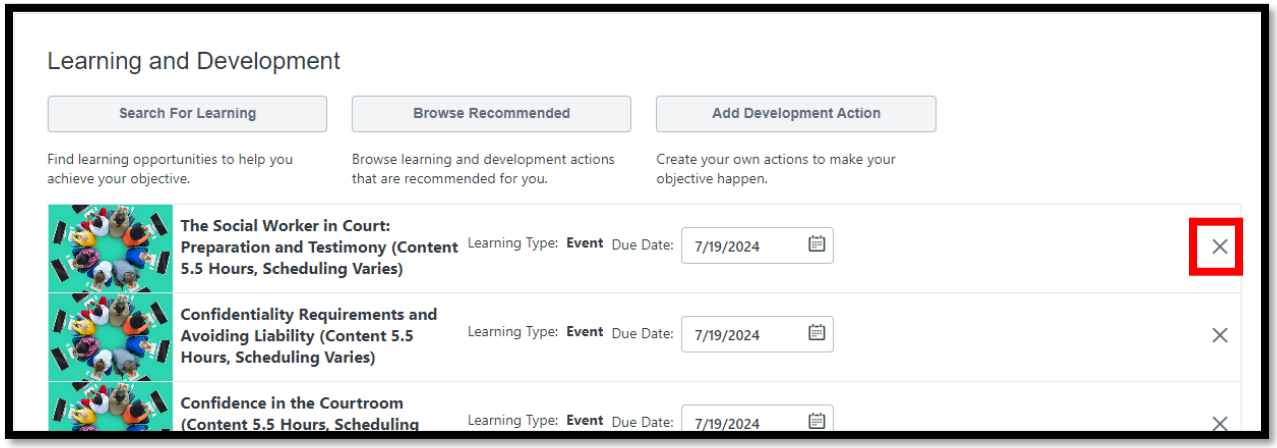


Select the **Pencil** icon to the right of each objective:

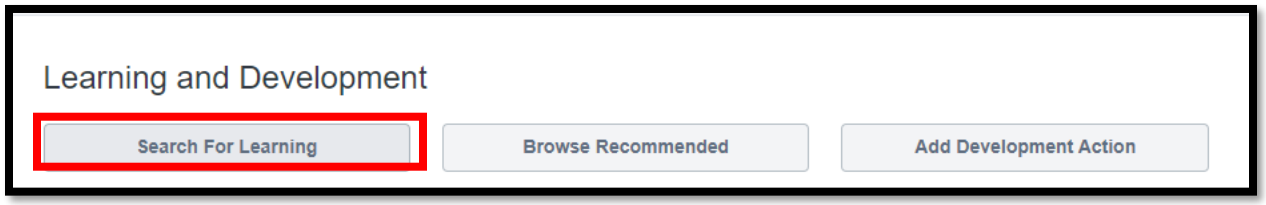


Adjust the **Due Dates** of your individual learning activities to match your two-year ITNA cycle end date. The system defaults to extending them only a single year. Making this adjustment ensures you will receive timely reminders when your plan is due to expire, as your plan's end date becomes the farthest due date on any objective or action within the plan.

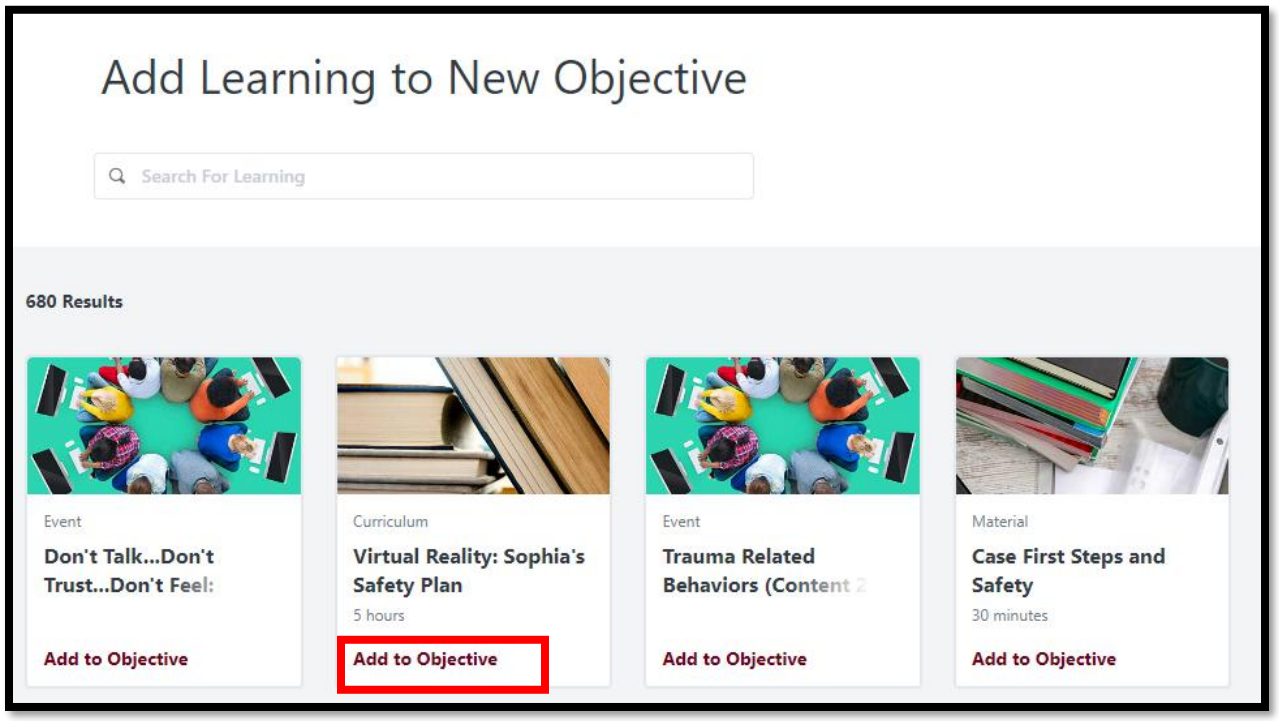
Remove development actions you no longer plan to pursue by clicking the **X** to the right of that object:



Use the **Search for Learning** button to search for and add new learning objects to an objective:



To add learning objects from search results to your plan, select **Add to Objective** at the bottom of the learning object tile:



When finished searching for or adding new actions, select **Return to Objective** at the bottom of your search results screen:

When finished adjusting learning objects and dates within an objective, select **Save and Return to Plan**:

When you are finished adjusting your overall plan, select **Submit Plan.** This will alert your supervisor the plan is ready for their review and approval:

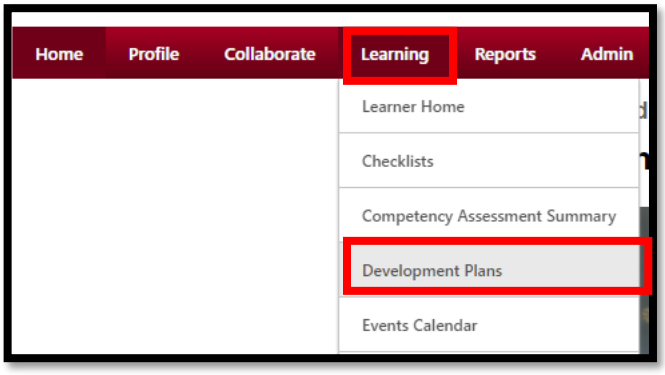
5. WORKING WITH ACTIVE DEVELOPMENT PLAN(S)

Once a plan is approved, it becomes your guide for learning and development over the remainder of your two-year ITNA cycle. Not only does your plan link you to learning interventions designed to meet your specific development needs, it allows you to…

- Create plan-related threaded conversations with your manager,
- Upload supporting documents (e.g., competency assessment results report, coaching documentation, peer-shadowing notes, etc.),
- Monitor your plan-completion progress,
- Review your plan's modification and approval history.

ACCESS YOUR EXISTING PLAN

Access your plan by selecting **Development Plans** from your **Learning** menu and clicking the plan's title:

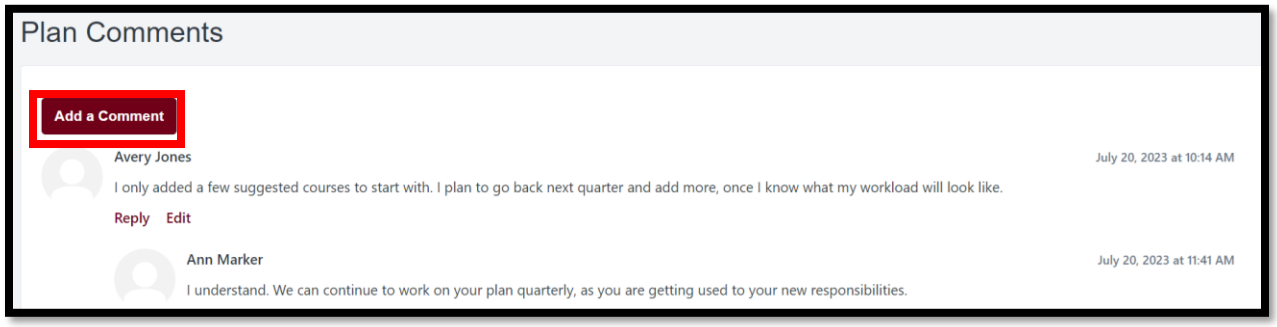


Once in your plan, click on a learning action to see more details about it, and to enroll in it (instructor-led) or launch it (self-directed). The learning action will open in separate browser tabs. Simply close the new tab to return to the development plan view.

As you complete learning actions identified in your plan, their status in the plan changes from "Not Started" to "Enrolled," "In-Progress," "Completed," etc. The objective's and the overall plan's completion percentages are automatically updated as learning actions are completed.

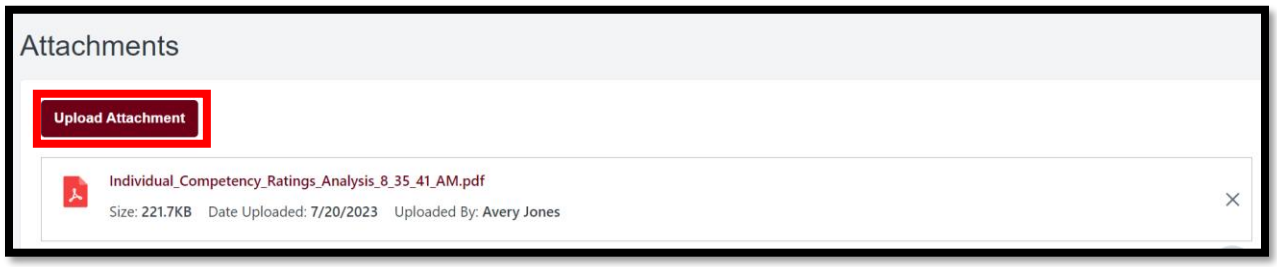
ADD AND RESPOND TO PLAN COMMENTS

Your plan includes built-in discussion capability. Under **Plan Comments**, select **Add a Comment** to create a threaded discussion between you and your supervisor:



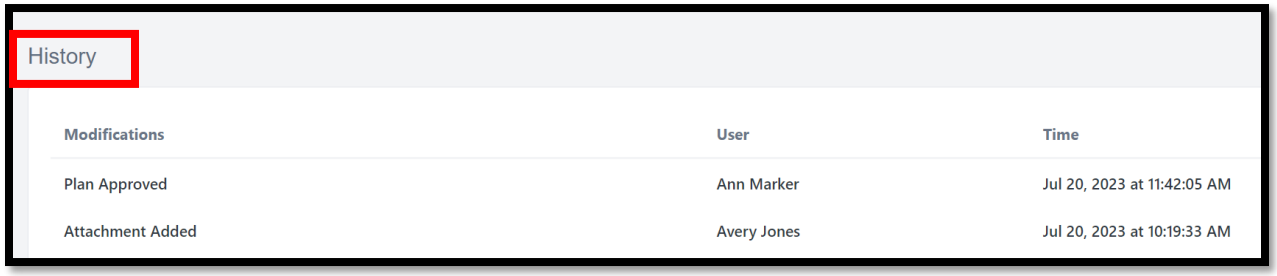
ADD SUPPORTING DOCUMENTS

You also have the ability to add supporting documents to your plan. Under **Attachments**, select **Upload Attachment** to add files like your competency assessment results report, coaching, or shadowing documentation, etc.:



MONITOR PLAN HISTORY

To see whether your manager approved your latest plan update, scroll to the **History** section to review when the plan was created, modified, and last approved by your manager:

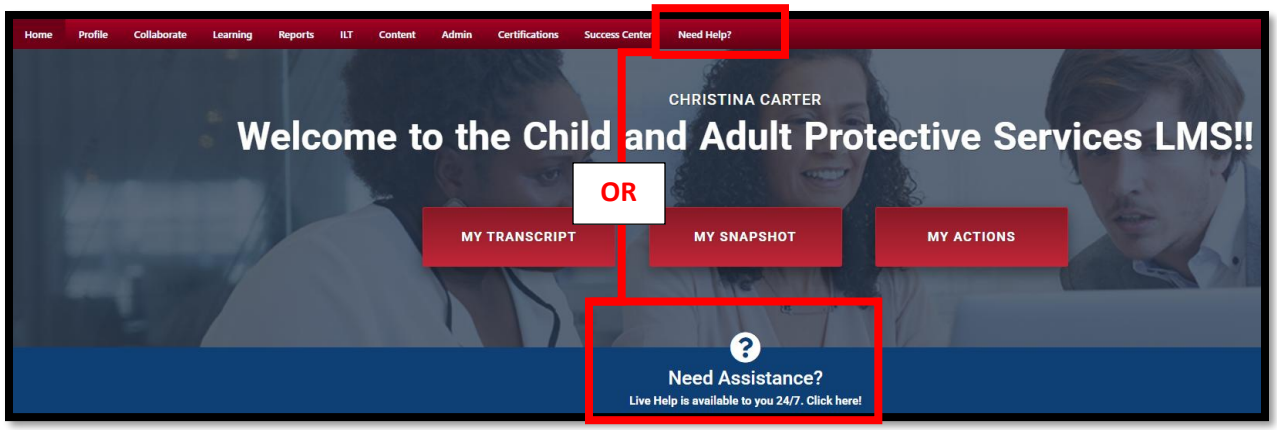


ADD OR EDIT PLAN OBJECTIVES AND LEARNING ACTIONS

To add or change plan objectives or the learning actions within them, select **Edit Development Plan** from the dropdown at the top of the plan and then follow the steps in Section 4 of these instructions:

7. TECHNICAL ASSISTANCE OPTIONS

Select **Help** under the **Need Help** menu tab or select **Need Assistance** from your **Welcome** page:



Select the **Live Support** option to connect with 24/7 support staff. Or select **Training Center** for contact info for your RTC.

APPENDIX: KEY PRACTICE AREA SEARCH CRITERIA

The lists below provide learning catalog search criteria to match each PCSA Caseworker and PCSA Supervisor Kep Practice Area. This will assist you in finding learning activities to address key practice areas you identified as priority needs in your ITNA and created objectives for in Section 4.

PCSA Caseworker Key Practice Areas

Key Practice Area	**CAPS LMS Catalog Search Criteria**
Domestic Violence	Domestic Violence
Substance Use	Substance Use
Mental Health	Mental Health
Crisis Intervention	Crisis Intervention
Working with Older Youth Transitioning Out of Care	Independent Living Pathway: Life Skills Pathway Pathway: Resource Family Readiness Population Served: Adults-Young
Human Trafficking	Human Trafficking
Workload Management	Workload Management

Trauma-Informed Practice	Series: NCTSN's Child Welfare Trauma Training Toolkit
Criminal Justice System	Legal Aspects Legal Aspects: Courts Legal Aspects: Courtroom Preparation Legal Aspects: Legal Rights Legal Aspects: Mediation Legal Aspects: Testimony
Sexual Abuse	Maltreatment: Abuse-Sexual
Physical Abuse	Maltreatment: Abuse-Physical
Neglect	Maltreatment: Neglect
Secondary Trauma	Trauma: Secondary
Father and Paternal Engagement	Engagement Family Search and Engagement

PCSA Supervisor Key Practice Areas

Key Practice Area	**CAPS LMS Catalog Search Criteria**
Leadership	Leadership
Conflict Management	Conflict Management
Staff Performance	Staff Performance
Staff Development	Professional Development Professional Development: Coaching Professional Development: Development Plans Professional Development: Orientation Professional Development: Training Needs Assessment
Team Development	Collaboration/Teaming: Intra and Inter-Agency Teams Collaboration/Teaming: Team Development
Change Management	Leadership Supervision
Father and Paternal Engagement	Engagement Family Search and Engagement