National Institutes of Health

HHS Learning Portal

LMS MANAGER/SUPERVISOR USER GUIDE

National Institutes of Health
OHR/HRSAID/CSBAB

HHS LEARNING PORTAL

LMS MANAGER/SUPERVISOR

Version 4.0

National Institutes of Health

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1.0	05/10/2011	NIH LMS Team		Initial publication
2.0	3/23/2012			
3.0	04/24/2013	NIH LMS Team Lead		5.5 Updates
3.1	07/03/2013	NIH LMS Team Lead		URL updates
4.0	01/05/2015	NIH LMS Technical Lead		7.2 Updates

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PREFACE: ABOUT THIS GUIDE

INTENDED AUDIENCE

This guide is intended to provide guidance to NIH Managers/Supervisors who need to access the HHS Learning Portal and manage their team's learning. Management of team learning consists of the following:

- View team member enrollments
- Approve training for your team members
- Update a team member's transcript
- Assign a curriculum or certification to a team member
- Register a team member for a course
- Add a competency requirement to a team member
- Manage the learning plan of a team member
- Perform an assessment on a required competency for a team member
- Run reports based on team member learning

You will need to have a team in order to perform these tasks. A team consists of people that have *you* designated as manager in their HHS Learning Portal profile. The manager for federal employees is the ITAS Timecard Approver which is received directly from the ITAS system. Contractors may have their managers entered manually. Management of your team extends down to your team members' subordinates as well.

HOW TO GET HELP

If you encounter technical difficulties with the LMS or while performing any tasks in this user guide, please submit a ticket at: https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx

If you have questions about the NIH training center policy, please contact the NIH Training Center at training1@od.nih.gov, or call the NIH Training Center at 301-496-6211 and ask to speak with a NIH Training Center representative.

ADDITIONAL HHS LEARNING PORTAL INFORMATION

Additional information about the HHS Learning Portal can be found at:

http://trainingcenter.nih.gov/lms_courses.html

https://hr.nih.gov/hr-systems/lms

QRG's for Manager/Supervisor tasks are located at:

https://hr.nih.gov/hr-systems/lms

ACCESSING THE LMS

The HHS Learning Portal can be accessed by navigating to the HHS Learning Portal/LMS URL (https://lms.learning.hhs.gov/), You will automatically be redirected to the AMS log on page.

If you need help accessing the HHS Learning Portal through HHS Access Management System (AMS), please refer to the NIH-specific log on instructions found at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

GETTING STARTED

USING WEB BROWSERS

The LMS can be used online with multiple computer platforms. The recommended web browsers for each major platform are listed below.

PC USERS

PC users should use Microsoft Internet Explorer to access the HHS Learning Portal.

MAC USERS

Mac users should use Safari to access the HHS Learning Portal.

POP-UPS AND DOWNLOADS

Many functions in the LMS require pop-up windows. Make sure your browser allows pop-ups from the HHS Learning Portal. For help with this, please contact the NIH IT Service Desk at http://itservicedesk.nih.gov/

Some LMS functions require you to download files, such as printing a certificate of completion from your transcript. You can facilitate this function by checking your browser security settings and allowing file downloads from the HHS Learning Portal. For help with this, please contact the NIH IT Help Desk at http://itservicedesk.nih.gov/

LMS TERMS AND DEFINITIONS

Audience Types - Audience Types are used to group organizations and learners in the system. Similarly, Audience Sub-Types allow for the Audience Types to be grouped further into smaller groups. These groups can then be used to control access to learning offerings in the LMS.

Behavioral Descriptors – Behavioral descriptors are descriptions associated with proficiency levels. They are intended to help establish an anchor that raters and viewers can use when assessing the proficiency level of a competency holder.

Certification – A certification is a predefined set of courses, other certifications, or any combination thereof, that have been grouped together with a deadline for completion. Credentials earned by completing the certification may expire on a predetermined date.

Competency – A competency is a skill, knowledge, ability, or behavior that can be measured, calculated, acquired, specified, or tested. Examples of competencies include “Project Management”, “Written Communications”, and “Interpersonal Communications”. Competencies are notated as either “held” or “required” in the LMS.

Competency Gap – A competency gap is the numerical difference between the required level of a competency and the individual’s currently assessed level of a competency.

Course – A course is organized training with planned objectives for learners to complete. Courses may be offered using a variety of delivery types and may have multiple offerings.

Curriculum – A curriculum is a predefined set of courses, other curricula, or any combination thereof, that have been grouped together. A learner must complete all courses and curricula to complete the curriculum.

Enrollment – An enrollment is an offering that a learner is registered for, but has not yet completed.

Held Competency – A competency receives the status of held in the LMS when it is assessed by the user or others.

Job Family – A job family is a collection of related jobs.

Job Role – A job role is a group of specific skills required to perform a job function. Roles can be shared across multiple jobs.

Jobs – A job is a collection of job roles.

Learning Plan – A Learning plan is a list of learning items a user intends to take and other tasks you need to perform as part of your general development. All LMS users have a single learning plan. Progress is monitored for all items on the plan.

Location – A location is either a geographic location, such as Bethesda, or a name that serves as an identifier, such as NIH Main Campus.

Multi-Rater Assessment (MRA) – A multi-rater assessment (MRA) is an assessment of competencies by a user's supervisors, peers, and subordinates.

Order – An order is a summary of registrations for learners. An order may include multiple learners or offerings.

Proficiency Level – A proficiency level represents the scale on which a competency is measured. Examples of the proficiency levels used at NIH include "Fundamental Awareness", "Novice", "Intermediate", "Advanced", and "Expert".

Ratee – A rate is he employee whose performance is evaluated.

Rater – A rater is an individual that will evaluate the performance of another employee in a multi-rater assessment.

Registration – A registration is a process that creates an enrollment for a learner and places their name on the roster for physical training or provides access to other methods of delivery such as online training.

Required Competency – A competency receives the status of required when it has been assigned to a user.

Surveys – A survey is a questionnaire that a respondent uses to evaluate a service or provide general feedback.

Transcript – a record or history of training taken by a learner.

User Profile – The User Profile contains information about the learner such as the employee status, start date, name, and organization. The profile does not contain sensitive information such as the employee's social security number or date of birth.

THE HHS LEARNING PORTAL DEFINED

WHAT IS THE HHS LEARNING PORTAL?

The HHS Learning Portal is a Department-wide training system designed to facilitate management of training for all Health and Human Services employees. It is also known as the Learning Management System or simply LMS. As we proceed through this manual, the term LMS will be used when referring to the HHS Learning Portal.

OVERVIEW OF THE LMS USER INTERFACE

THE MENU BAR

Once you have logged in, you will see a blue menu bar at the top of the every page within the LMS. On the menu bar you will always see your account name.

The menu bar has several options for you to use including a calendar, LMS preferences, proxy (if one has been defined), and a log out option.

The major functionality of each menu bar option is listed below:

Preferences: This option allows you to change the look and functionality of your Home Page. You may also set the default Location and Delivery Type used when searching the catalog for courses.

Calendar: The Calendar link will open a calendar that displays any scheduled (e.g., classroom) training that you are registered for in the LMS. The Calendar includes a Month, Week, and Day view. There is also a Create Appointment link that allows you to enter other events on your personal calendar.

NOTE: This calendar does NOT automatically update your Microsoft Outlook calendar.

Log Out: This link Logs you off of the system and takes you back to the login screen.

The Menu Bar is explained in more detail in the **LMS Learner/User Guide**

LMS PREFERENCES

The LMS allows you to alter your preferences and default search settings. You can change the visibility of portlets, catalog search preferences, proxy settings, and change your login password.

STEP-BY-STEP (SETTING YOUR LMS PREFERENCES)

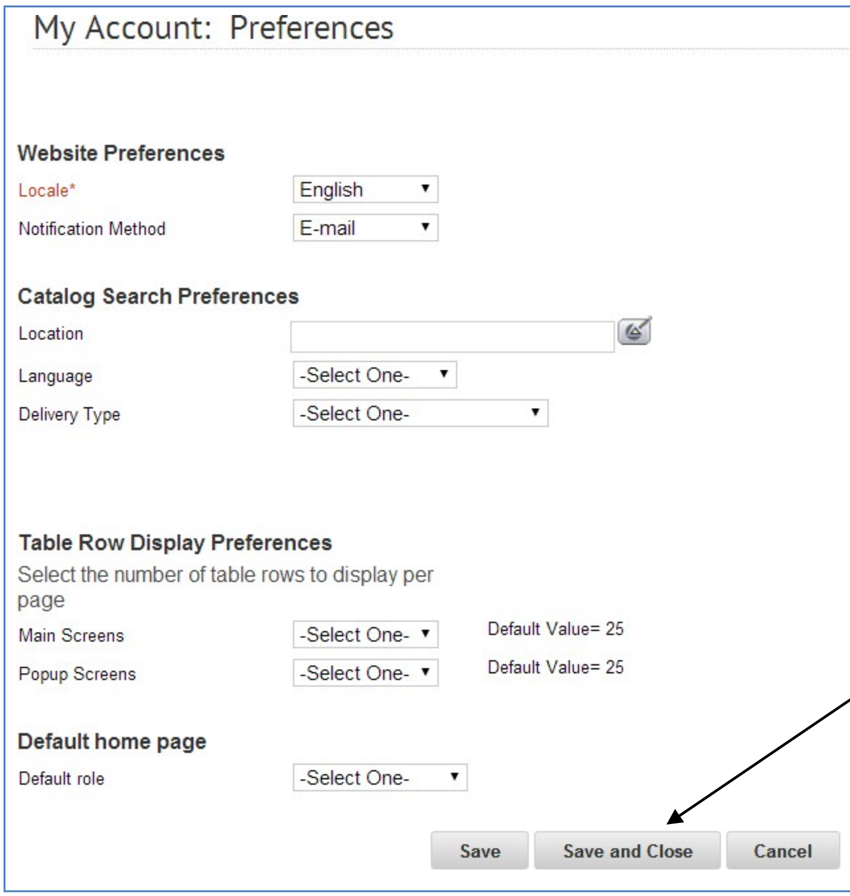
1. Log on to the LMS.

   NOTE: NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf

2. Click **Preferences** link on the LMS Menu Bar.

Preferences

3. **NOTE**: Make sure pop-ups are not blocked by your web browser.



Save and Close

Website Preferences - Do not change the settings.

Catalog Search Preferences - you can select your default location, language, and delivery type options for the course catalog search feature.

Table Row Display Preferences- you can edit the number of search results the LMS will display in the results tables and pop-up screens. (default value = 25)

Default Home Page - you can choose which role you would like to start in when you login to the LMS (for users with multiple roles).

4. Click **Save and Close**.

THE TEAM HOME ROLE

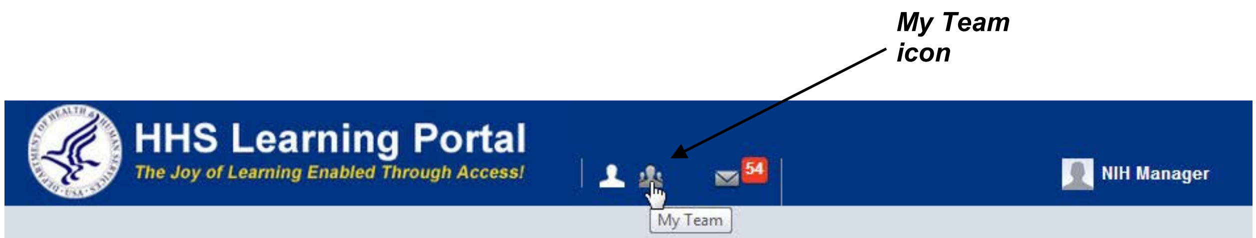
OVERVIEW

The Team Home role gives supervisors permissions to managing the learning of their employees. As a supervisor, you can:

- View your team member's profiles
- View and add competencies
- View previous competency assessments
- Identify competency gaps
- View team member's enrollments
- Update team member's transcripts
- Assign curriculum/ certification to tem members
- Register a team member for an offering
- Approve first level training registrations
- Verify and update CAN
- Create new competency assessments
- Run reports
- Manage the team's learning plans.

To access the Team Home role, follow these steps:

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at:
   hhttps://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf
2. Select the **My Team icon** on the LMS menu bar on the top.



NOTE: If there isn't a **My Team** icon ,you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. You will be taken directly to My Team Home page.

THE TEAM HOME PAGE

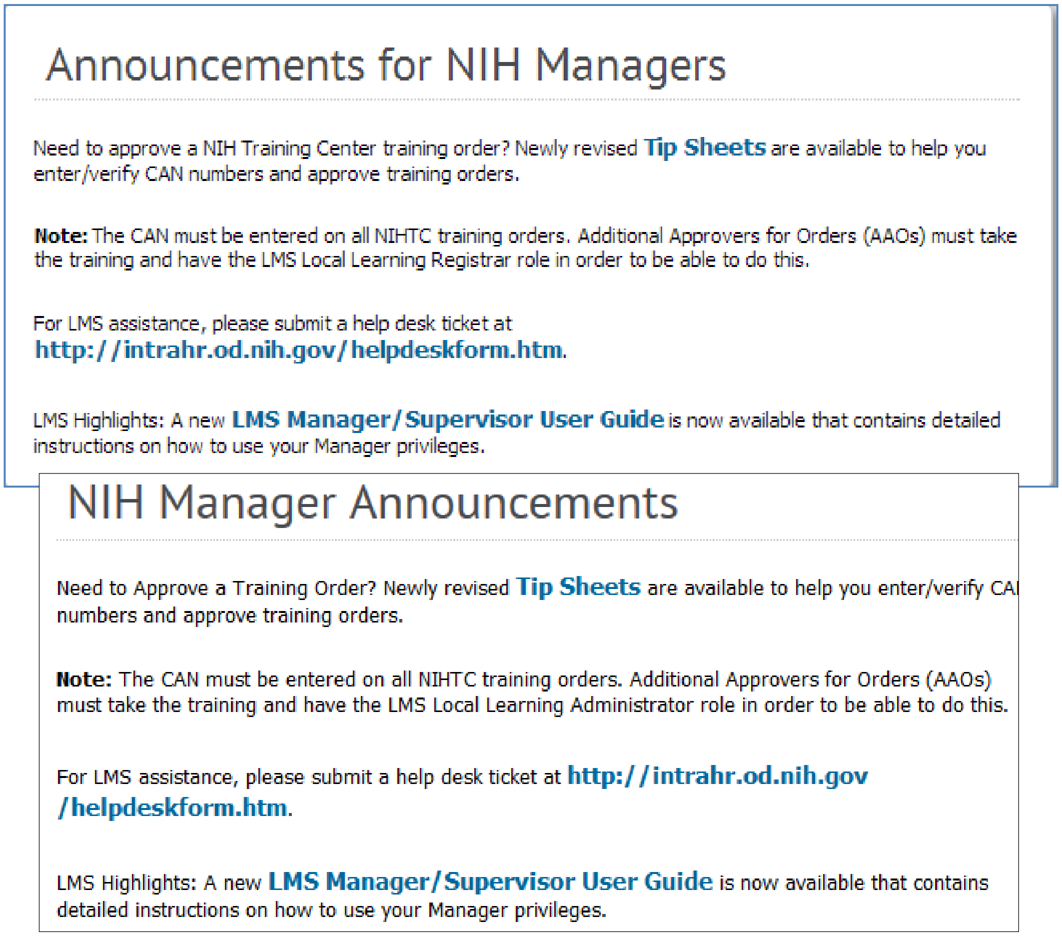
The My Team Home page has portlets available that display important team information. These portlets provide access to the following:

- View NIH specific and general announcements
- View Team member transcripts
- View and add team certifications
- View and add team competencies
- View team enrollments
- View LMS catalog of training and register team members

MY TEAM'S HOME PAGE PORTLETS

The *HHS Manager Welcome* portlet displays general announcements from the department with information on how to take an online course about how to use the LMS functions as a manager.

The *NIH Managers Announcement* portlet displays general announcements from NIH with information and links on how to use the LMS functions as a manager.



The *NIH Team Navigational Links* portlet allows you view your team's enrollments, transcripts, certifications and competencies.

The *Video Announcements* portlet allows you to view any announcements which have been posted via video.

The *HHS Announcement* portlet allows you to view any announcements which have been posted by the Department.

HHS Announcements

Welcome to the HHS Learning Portal!

New Offering Available!

HHS "Safety Awareness for Managers and Supervisors"

The "Safety Awareness for Managers and Supervisors" online training introduces key laws, regulations, policies, principles, and practices surrounding safety programs for Federal workers; promotes compliance; and provides managers with valuable information to help ensure a safe and healthy workplace. Unique learning paths are available for Senior Executive Service members, managers and supervisors, and employees. Offered sections include:

- Part 1: Laws and Regulations
- Part 2: Injury and Illness Reporting, Course A
- Part 2: Injury and Illness Reporting, Course B
- Part 3: Workplace Hazards and Remediation, Course A
- Part 3: Workplace Hazards and Remediation, Course B

Select **here** to access the training and then select the appropriate learning

TEAM DIRECTORY

The Team Directory is used to view all of your team members and provide access to their profiles. All of your direct reports should be listed on the Direct Team tab. If there are any inaccuracies to your team, any changes should be done in the NED, which would then be reflected in the LMS. If changes in the NED cannot be easily done, a

LMS Manager/Supervisor

Local Learning Administrator or Human Capital Administrator may change the direct reports manually as needed in the LMS.

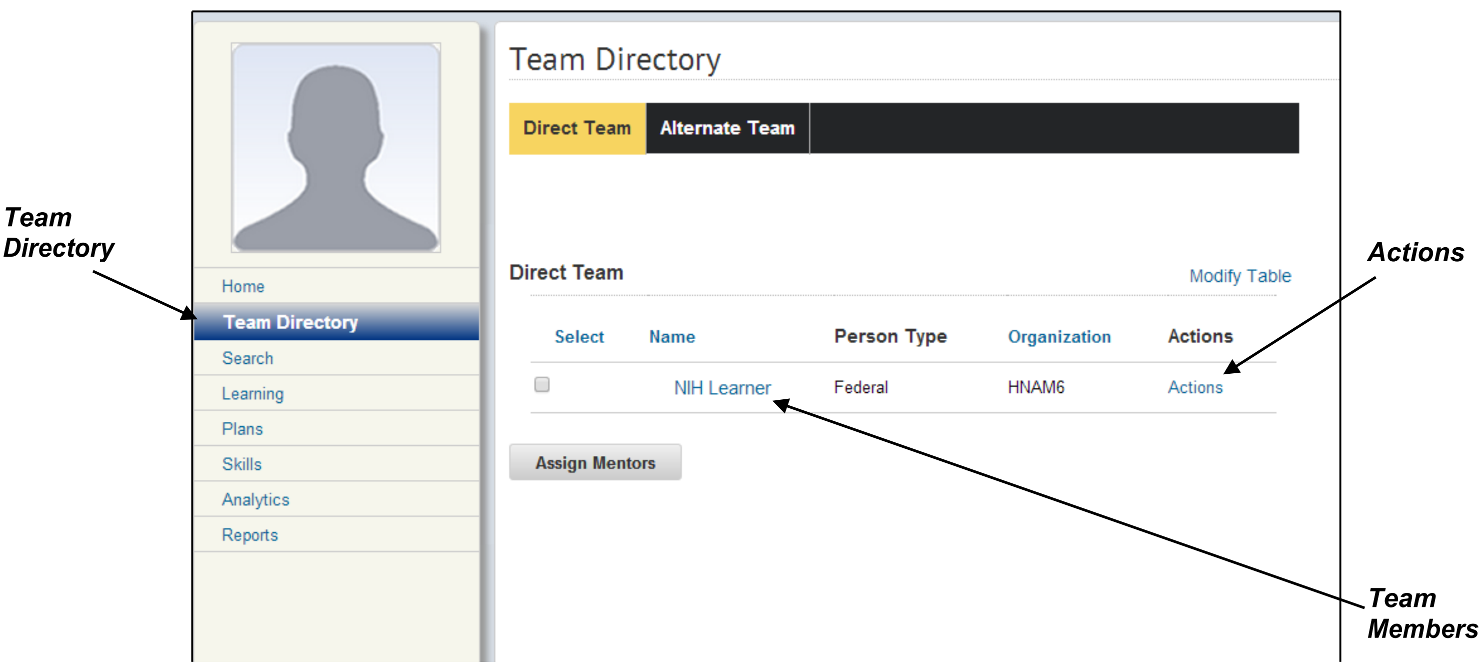
STEP-BY-STEP (VIEW A TEAM MEMBER'S PROFILE)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at:
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Select the **My Team** icon on the LMS Menu bar at the top of the screen.

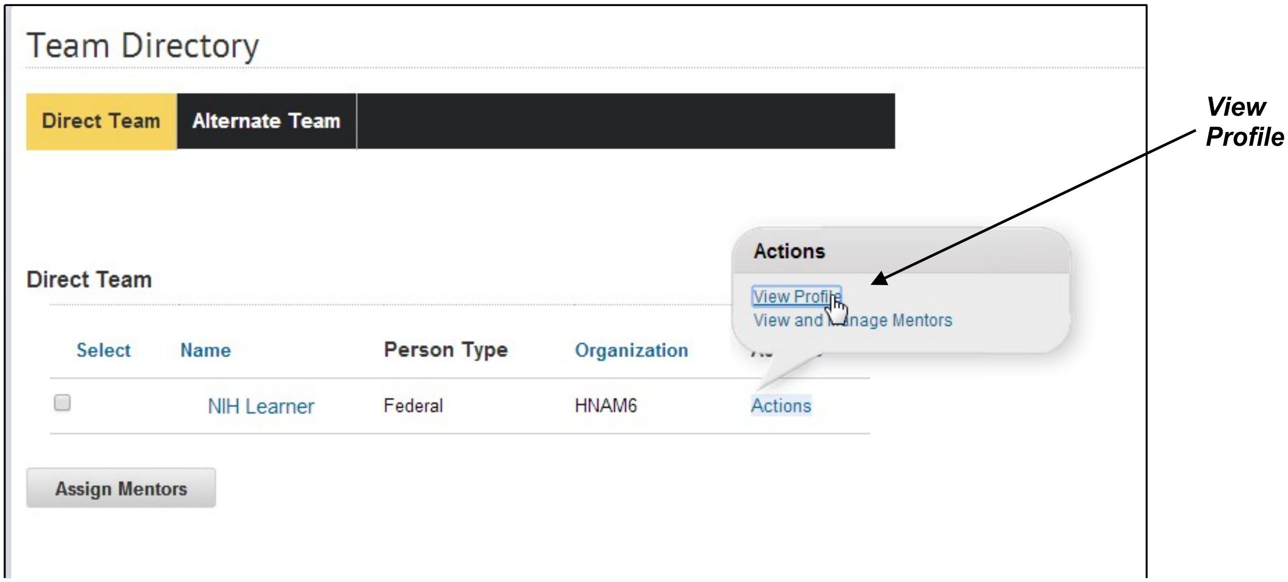
   NOTE: If there isn't a **My Team** icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH IC LMS administrators can be found at.
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click on the **Team Directory** link on the left menu.



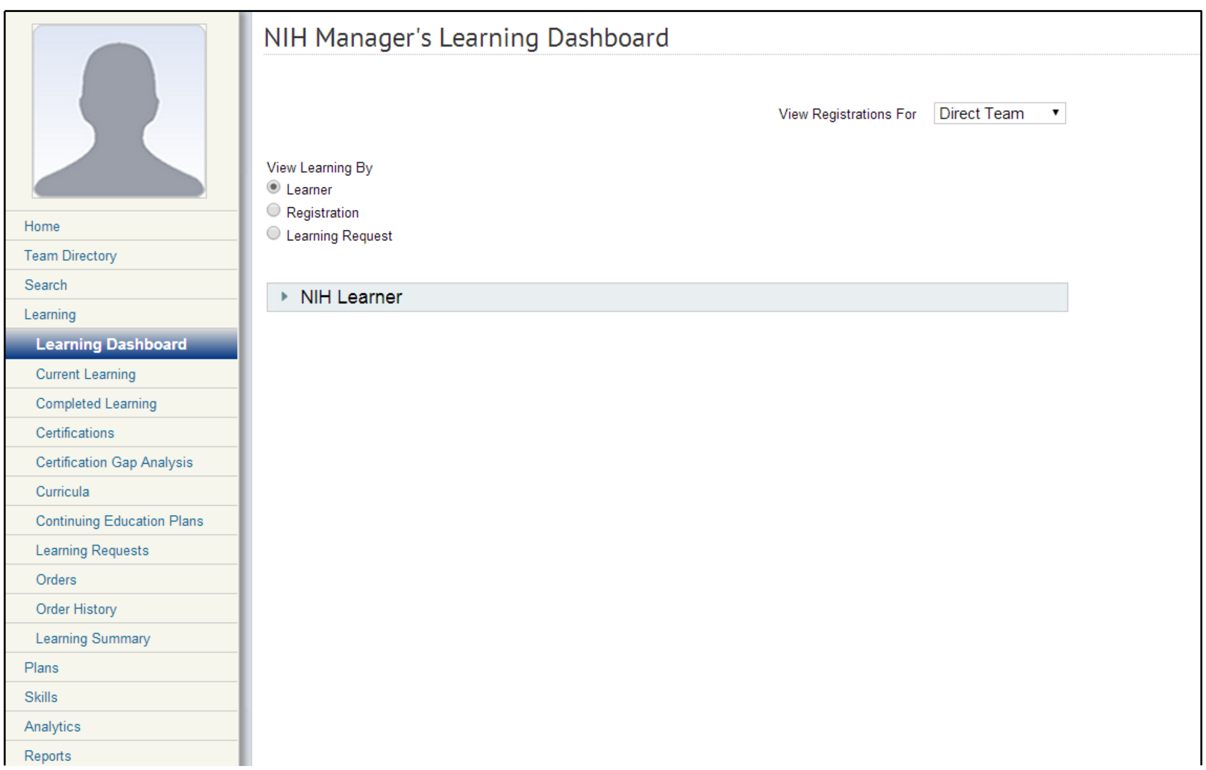
4. In the Actions Column of the Direct Team Table, place your cursor over the **Actions** link of the team member profile you wish to view.

5. Click the **View Profile** link.



6. You will now see the user's profile.

THE NIH MANAGER'S LEARNING DASHBOARD



The Learning Dashboard provides quick access to the major components of your team's learning in one location. From the **Learning Dashboard** screen you have access to the following:

- **Learner-** View Registrations and Learning request for specific team members.
- **Registrations** – view your team members registrations.
- **Learning Requests** –view learning requests for your team members.

REGISTRATIONS

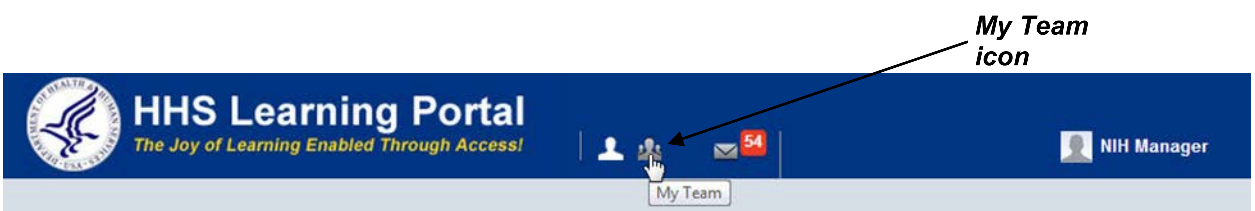
As a supervisor, you may manage your team members' registrations. When a team member is registered for a course, the LMS creates a registration. A registration is confirmed immediately unless a supervisor is required to approve the training. Until a supervisor approves the training, the team member is not officially part of the training. The following steps will guide you through the process of viewing and approving any unapproved training as well as rejecting or dropping the registration altogether.

STEP-BY-STEP (APPROVING PENDING REGISTRATIONS FOR TEAM MEMBERS)

1. Log on to the LMS.

   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf.

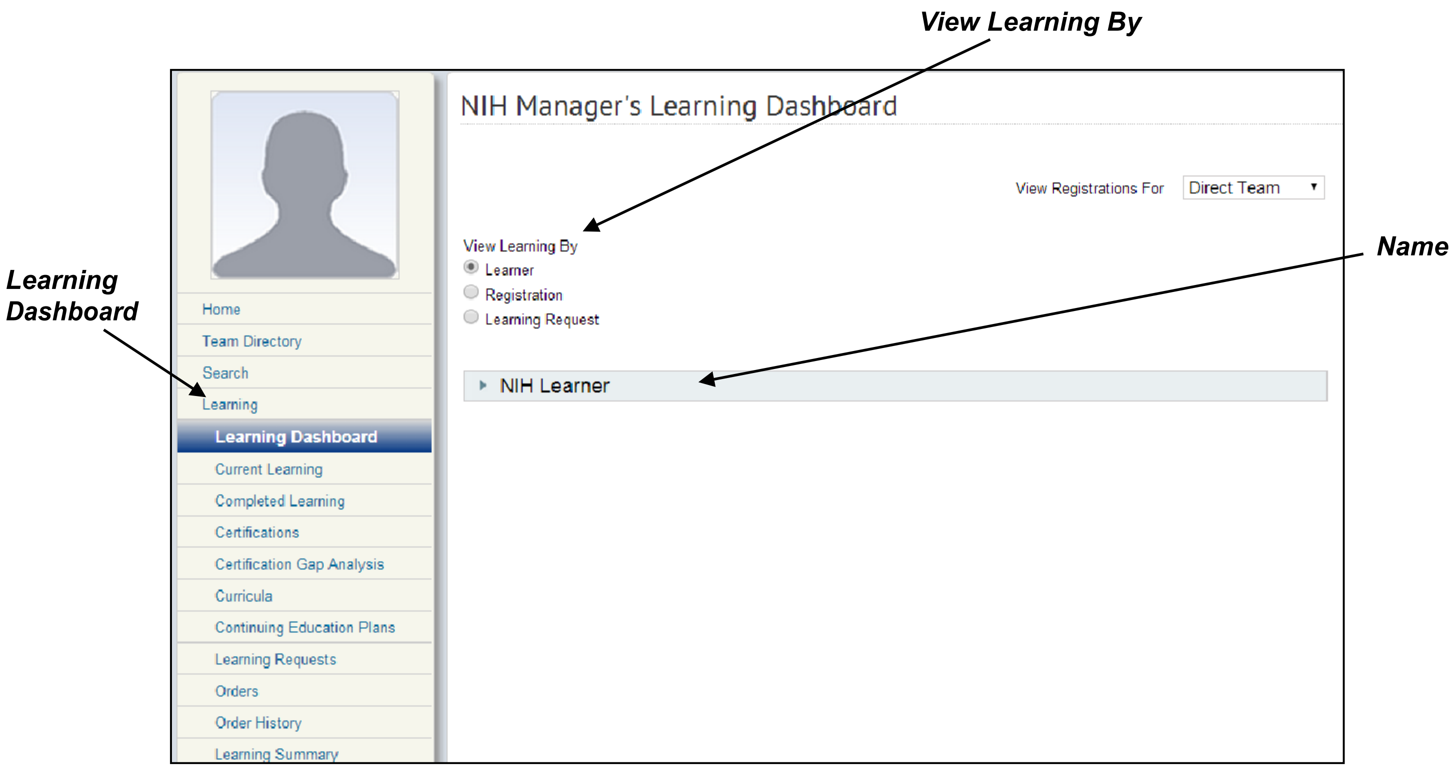
2. Click on the **My Team** icon on the LMS Menu bar at the top of the screen.

   NOTE: If there isn't a **My Team** icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

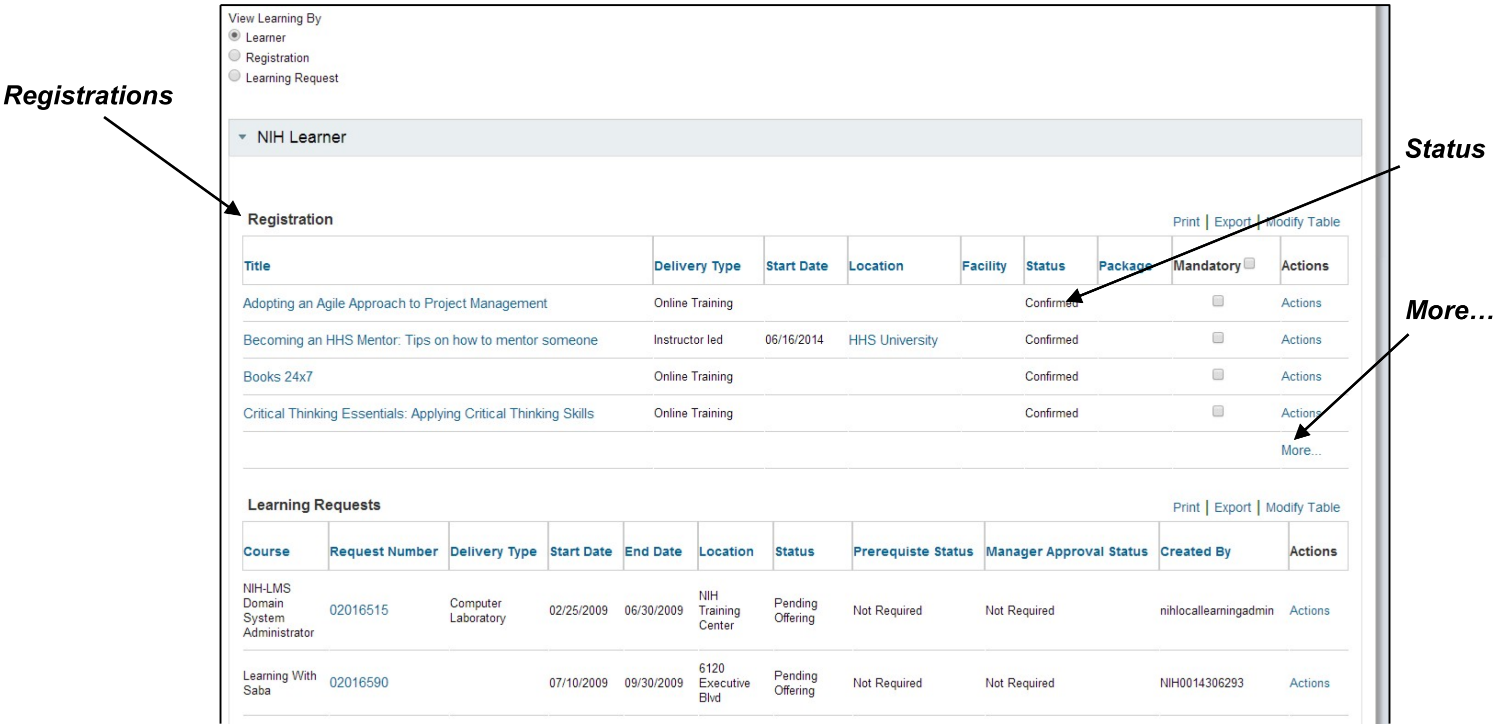
3. Click the **Learning** link on the left menu.

4. Click on the arrow next to the name of the team member you want to approve a registration.

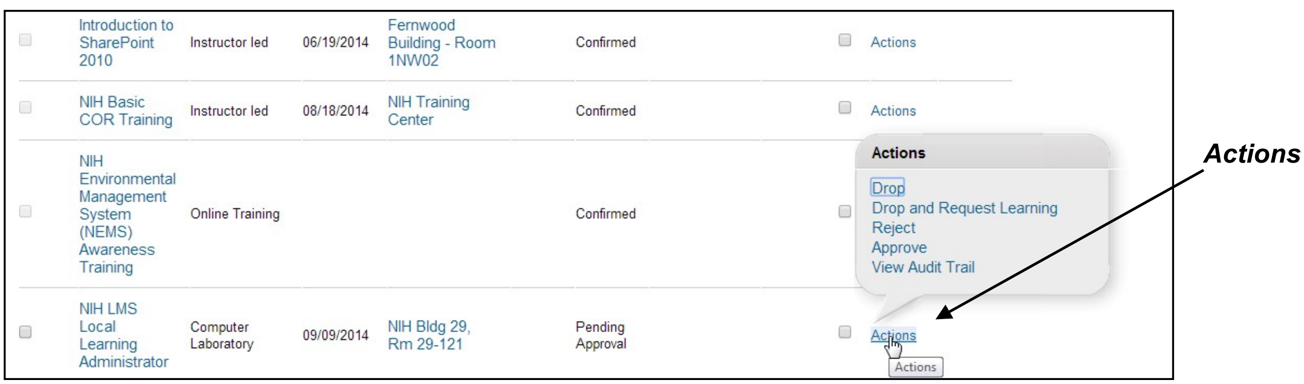


5. You now you will be able to see all the Registrations for that team member. You can also see the Status of the Registrations.

6. If you don't see the Registration you need to approve click on **More..** at the end of the Registration section.



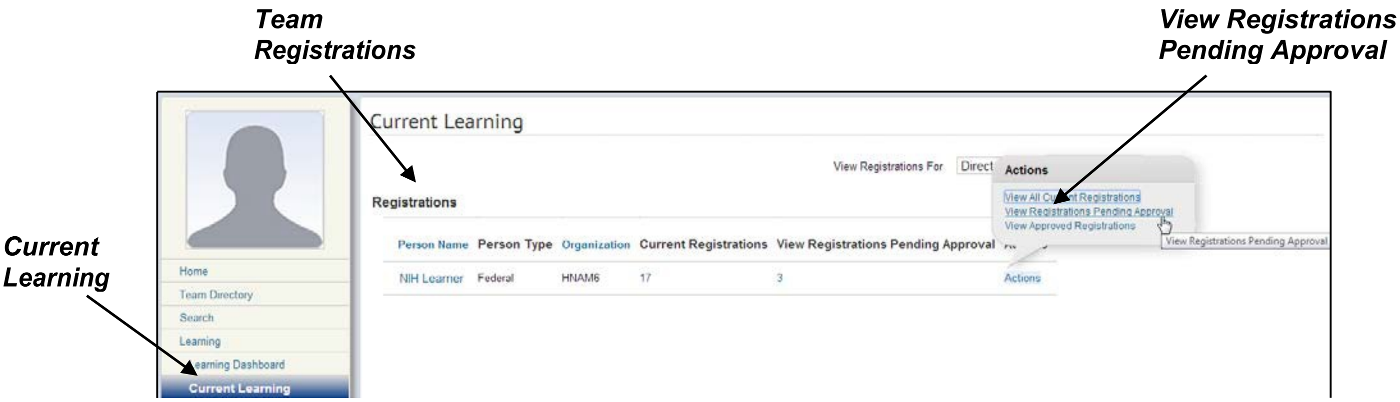
7. Place your cursor over the **Actions** link of the registration you wish to approve, reject or drop.



8. Select **Approve, Reject** or **Drop** in the Actions pop-up menu.

Important: Before approving training orders in the LMS, the order **must** contain a valid CAN to ensure the proper obligation of funds in NBS. If there is no tuition (i.e. the Price is 0.00), the CAN is not required. All **approved training orders without** a CAN number will automatically have the Learner's Payroll CAN number added to the training order the following night. This default CAN will be charged the price of the approved training class. You cannot change the CAN number on an approved order; the Learner must be dropped, and then re-registered.

Note: To view all team registrations, select **Learning** and then **Current Learning** from the menu on the left.



Note: The number of enrollments needing your approval is displayed under the **View Registrations Pending Approval** column. For more details you can click on **Actions** and then click on **View Registrations Pending Approval.**

MESSAGE CENTER -- ***NEW!***

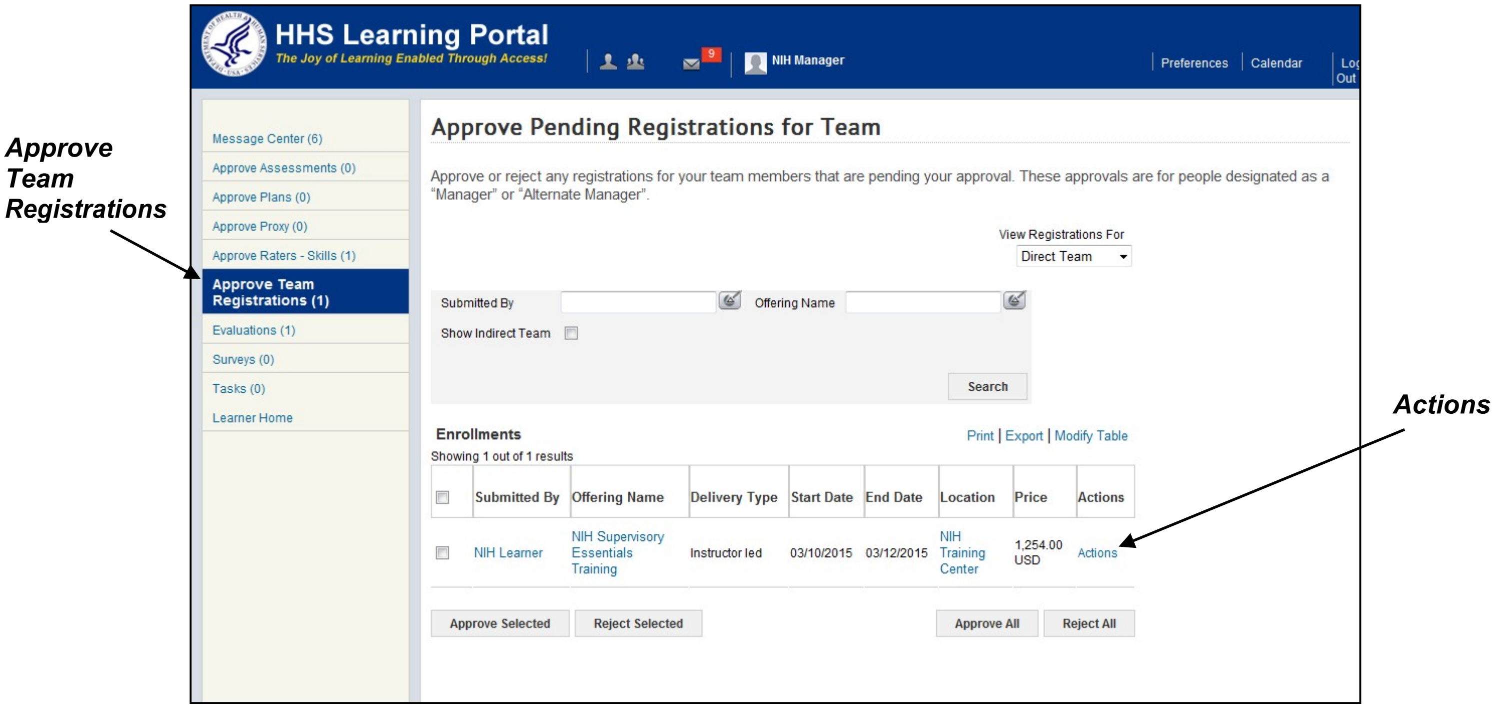
The new message center in 7.2 provides a central place for Managers to see registrations waiting for approval.

STEP-BY-STEP (VIEW REGISTRATIONS USING THE MESSAGE CENTER)

1. Click on the envelop icon to access the Message Center on the LMS Menu bar.

Note: The number next to the icon is for the total number of **unread messages**.

2. Click on Approve Team Enrollments link.



3. Click on **Actions** next to the registration you need to approve, reject or drop.

4. Select **Approve, Reject** or **Drop** in the Actions pop-up menu.

MANAGE TEAM CURRICULA

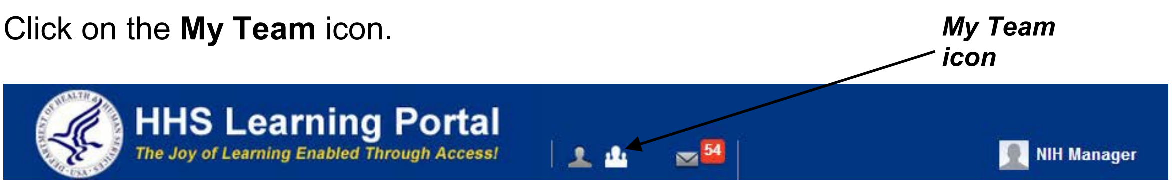
A curriculum is a group of one or more training items. You can view the training items needed to complete each curriculum as well as the progress made for all of your team members.

STEP-BY-STEP (VIEW MEMBER CURRICULUM)

1. Log on to the LMS.

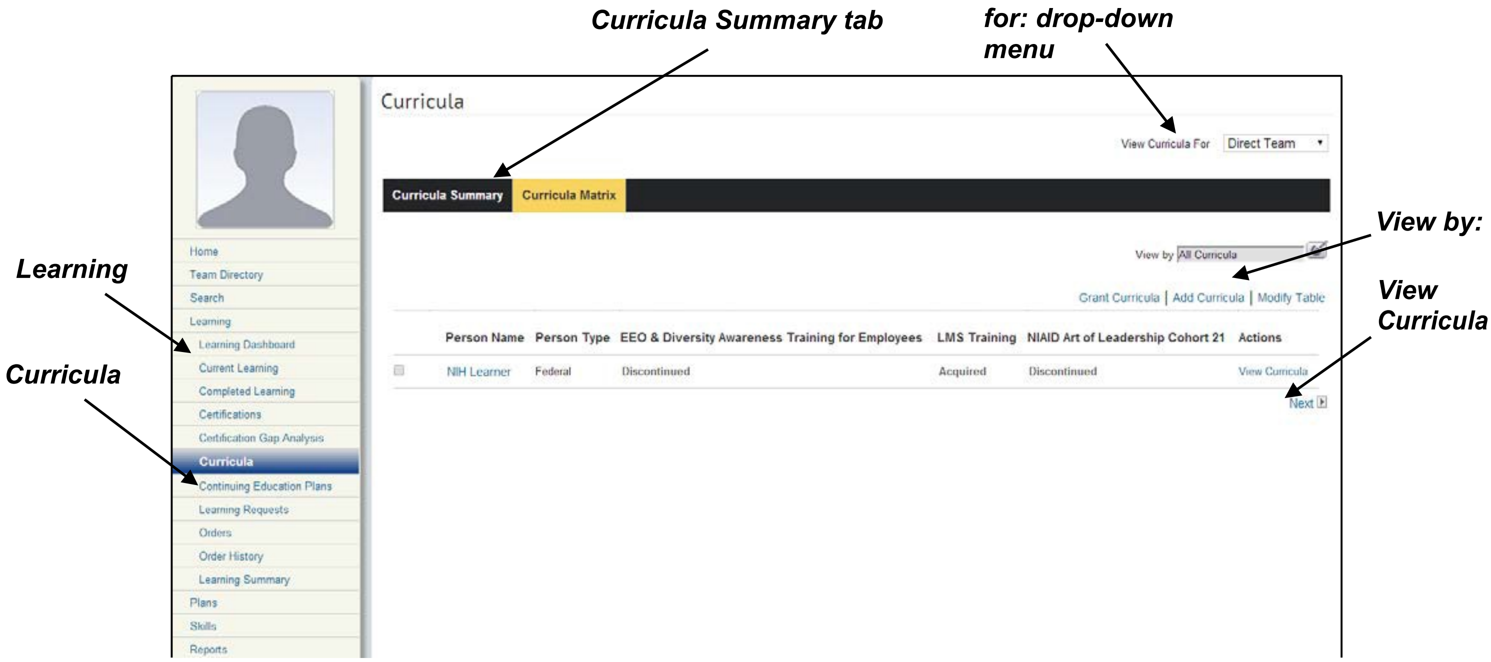
NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: hhttps://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon.



NOTE: If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at. https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

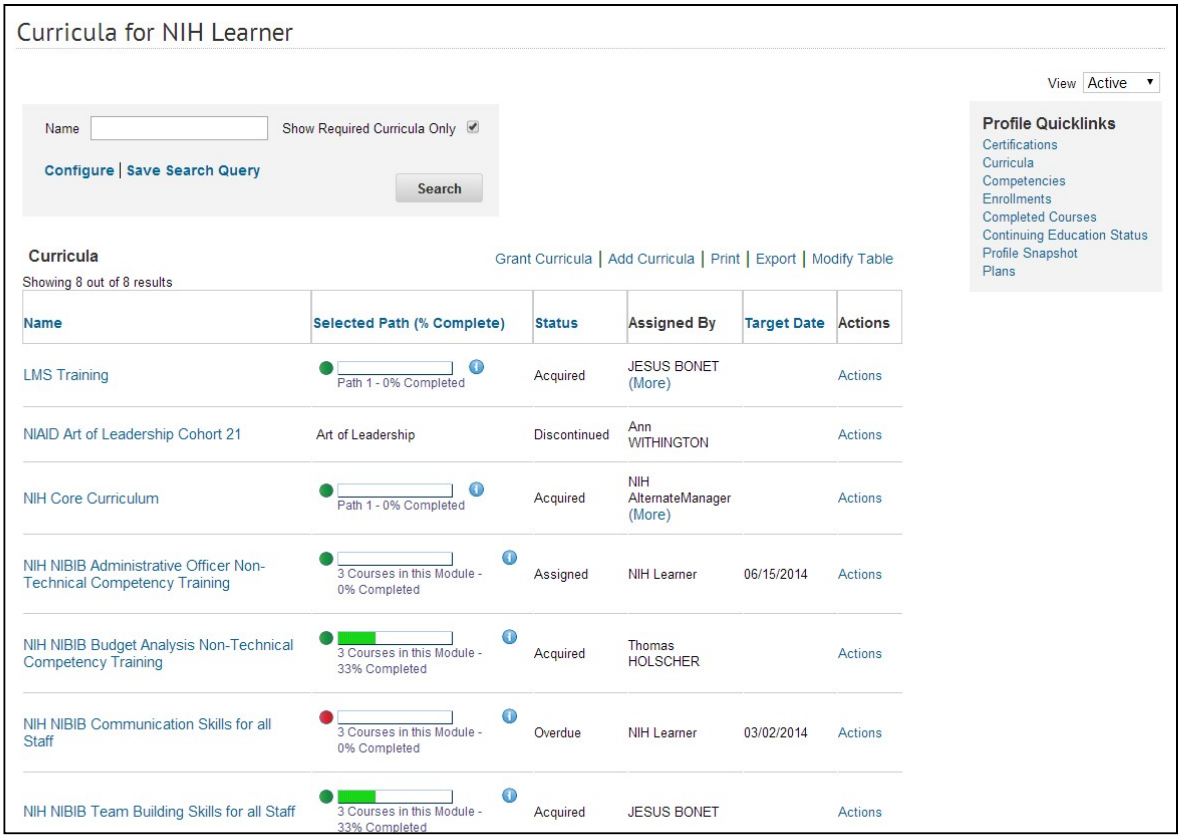
3. Click the **Learning** link on the left menu.



4. Click **Curricula** in the left menu.

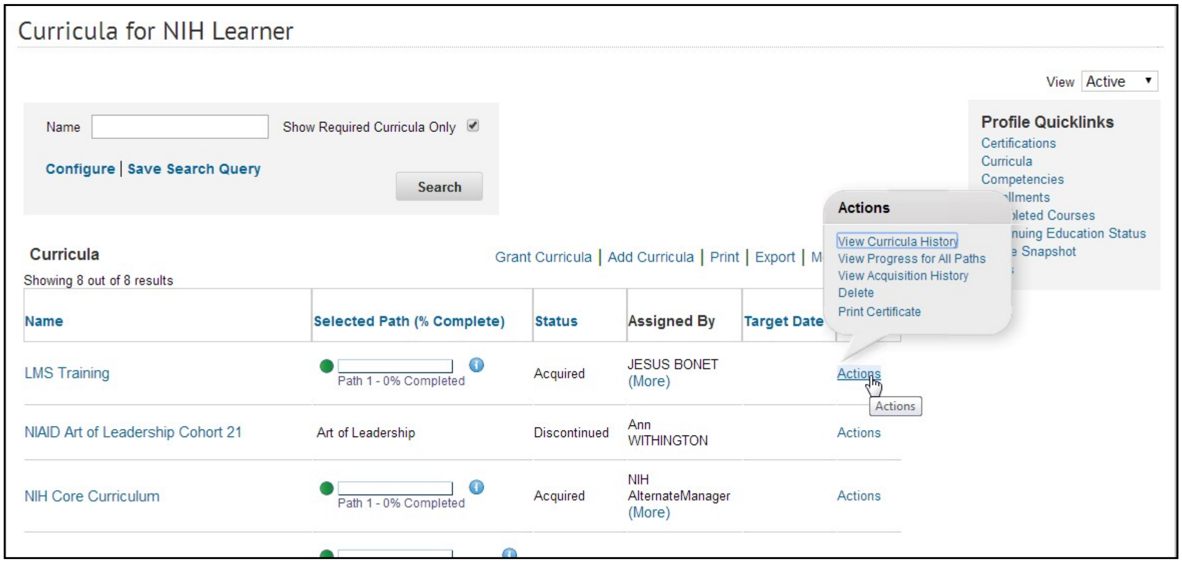
5. Click **View Curricula** associated with the team member.

   NOTE: You can also click the **View Curricula for:** drop-down menu to toggle between your direct team and alternate team or click the **View by:** drop-down menu to cycle through the views All Curricula, curricula by Job, curricula by Role. Click the **Curricula Summary** tab to view the summary view of your entire team's curricula.



6. You will now see a list of the curricula for the team member. If the team member has not been assigned a curriculum, you will see “No items found” displayed where the curriculum is shown.

7. Place your cursor over the **Actions** link to see available options.



STEP-BY-STEP (ADD CURRICULUM TO A TEAM MEMBER)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the menu bar.

My Team icon

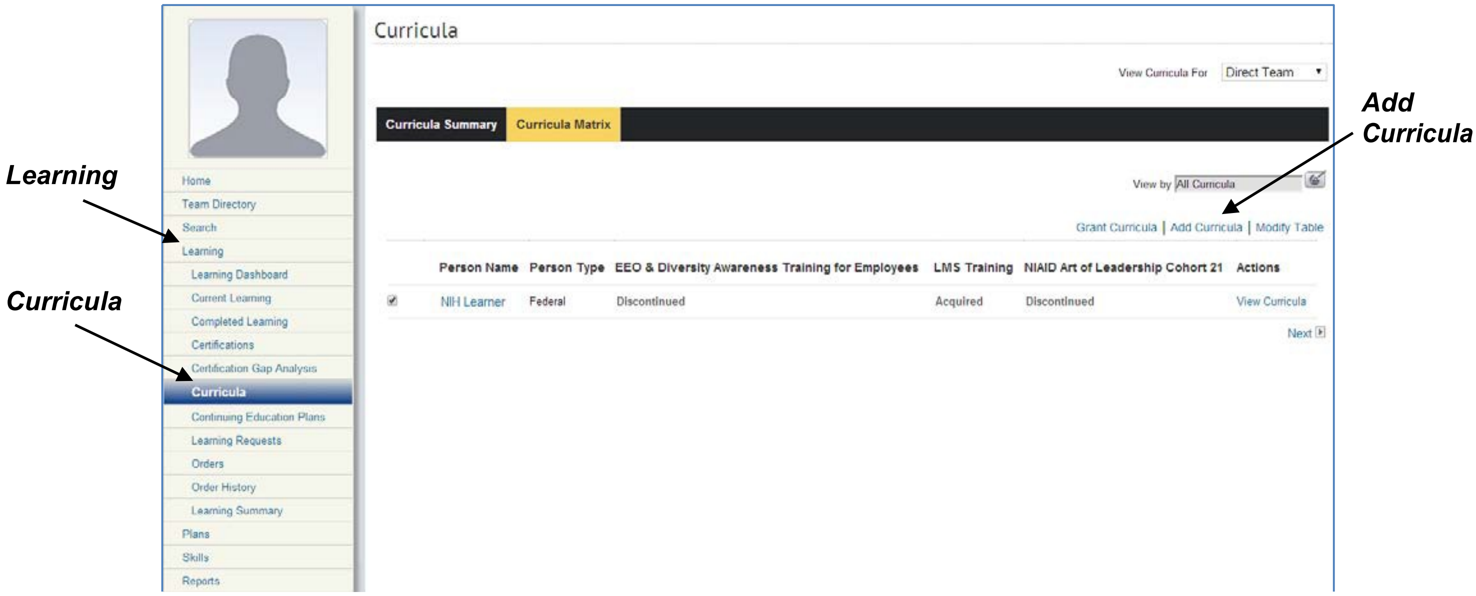
NOTE: If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH LMS administrators can be found at. https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click the **Learning** link on the left menu.

4. Click the **Curricula** link from the left menu.

5. Click the **checkbox** that is associated with the team member to which you will add a curriculum.

6. Click the **Add Curricula** link.



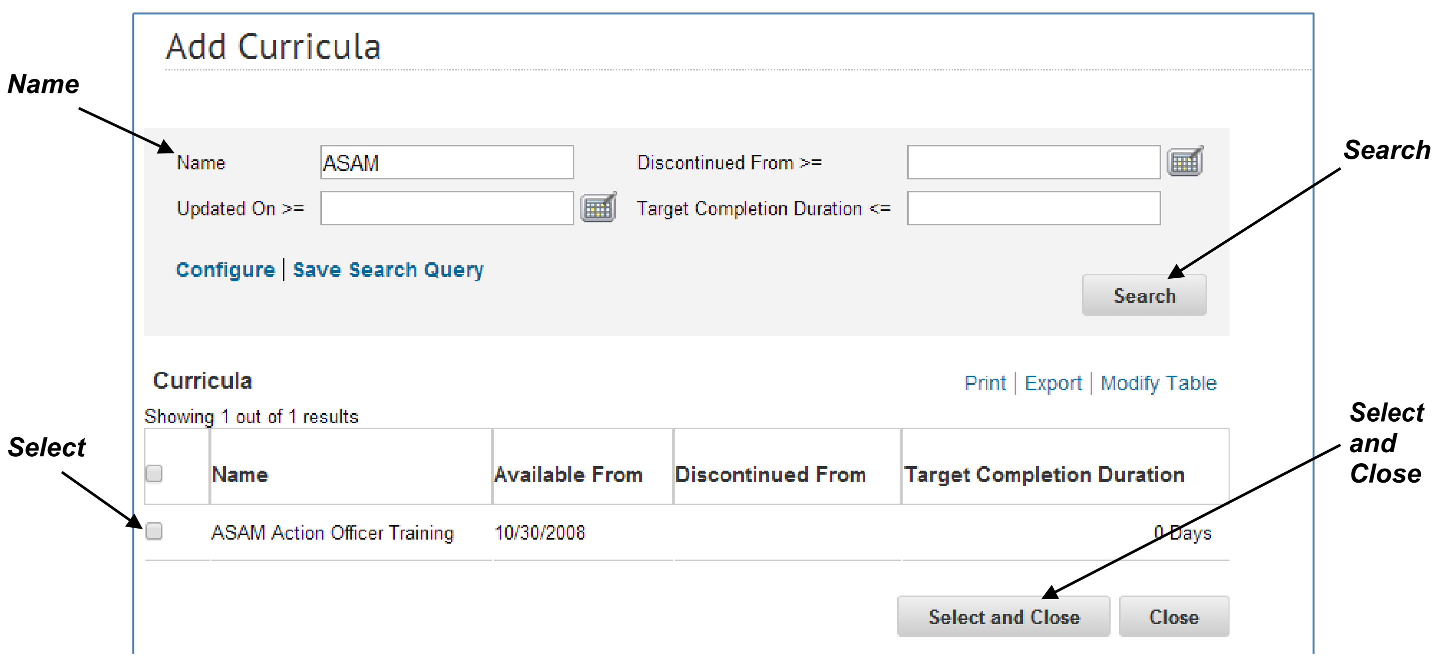
7. Enter the name of the curriculum you wish to add in the **Name** field.

8. Click **Search**.

9. Click checkbox associated with the curriculum you wish to add.

10. Click on Select and Close.

11. The curriculum will now be assigned to the team member.



MANAGE TEAM TRANSCRIPTS

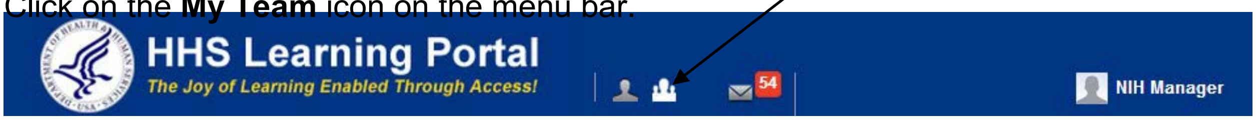
STEP-BY-STEP (VIEW TEAM MEMBER TRANSCRIPT)

1. Log on to the LMS.

   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the menu bar.

   My Team icon

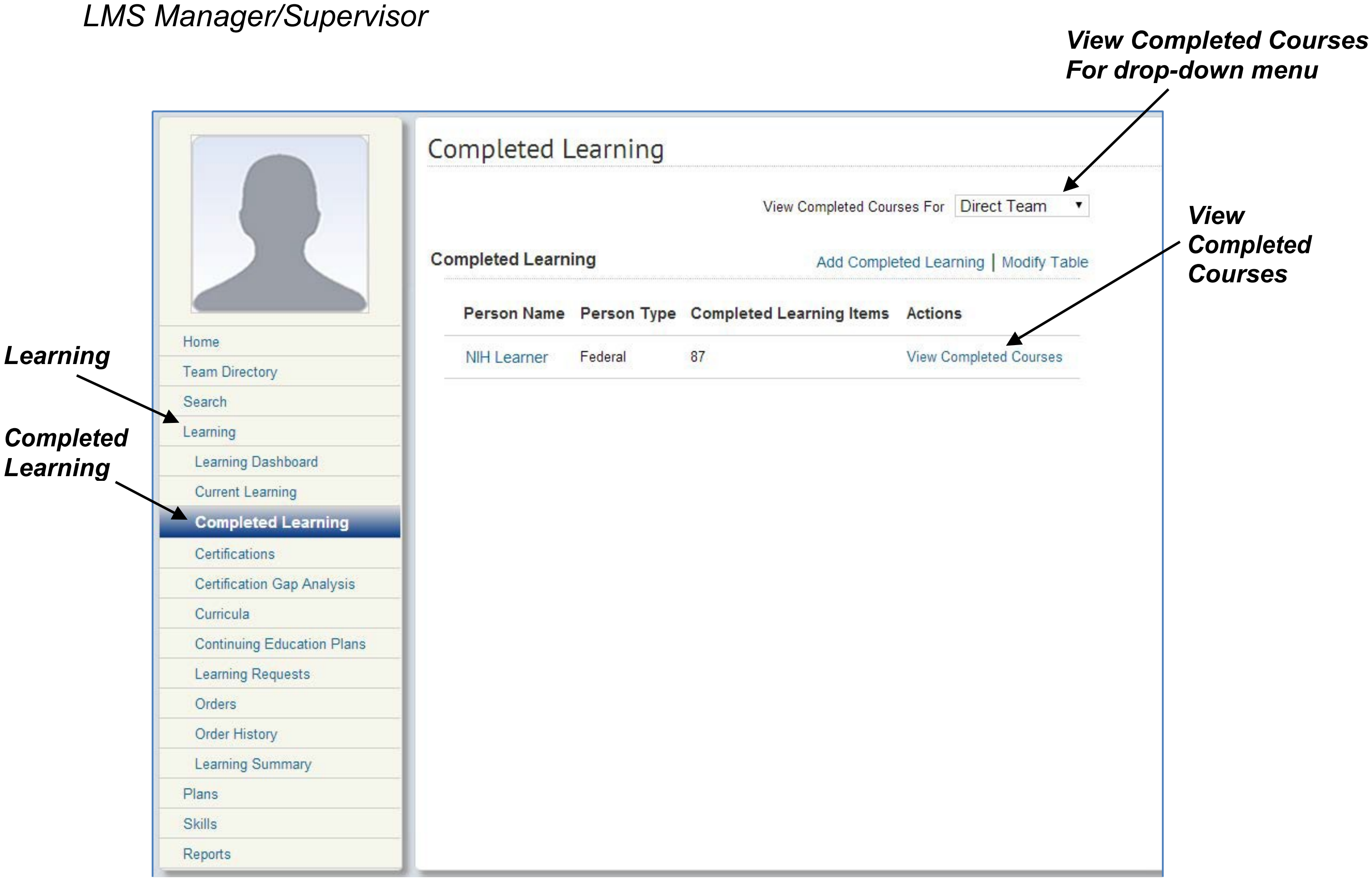
   

   NOTE: If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at. https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click the **Learning** link on the left menu.

4. Click **Completed Learning** from the left menu.

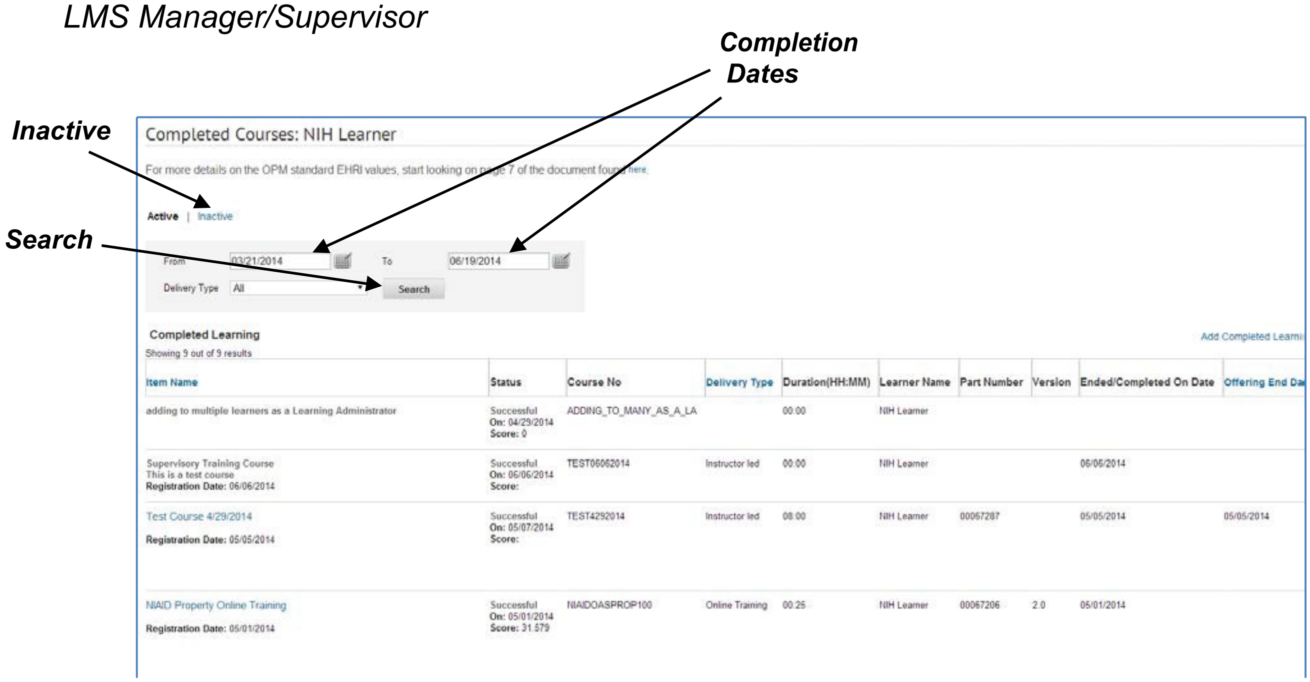
   NOTE: You may toggle between your direct team and alternate team by clicking the View Completed Courses For: drop-down menu.



5. Click the **View Completed Courses** link associated with the desired team member.

6. You will now see the team member's transcript. (By default the <u>last 3 months is displayed.)</u>

   NOTE: You may view a larger/smaller range of transcript history by changing the **Completion Dates** and clicking **Search**. Also, you may view inactive transcript items by clicking the **Inactive** link.



REGISTER TEAM MEMBERS FOR COURSES

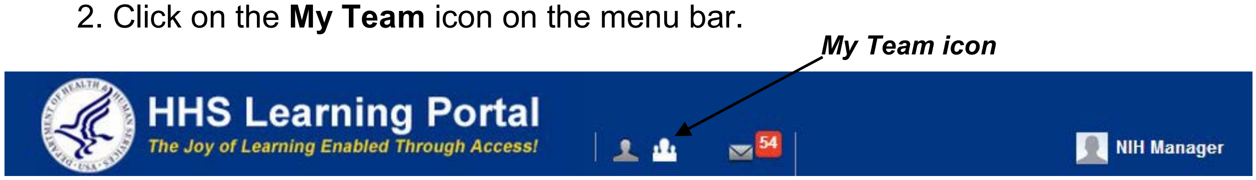
STEP-BY-STEP (SEARCH THE LMS CATALOG AND REGISTER TEAM MEMBERS)

As a supervisor, you have the ability to register your team members for training.

1. Log on to the LMS.

NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

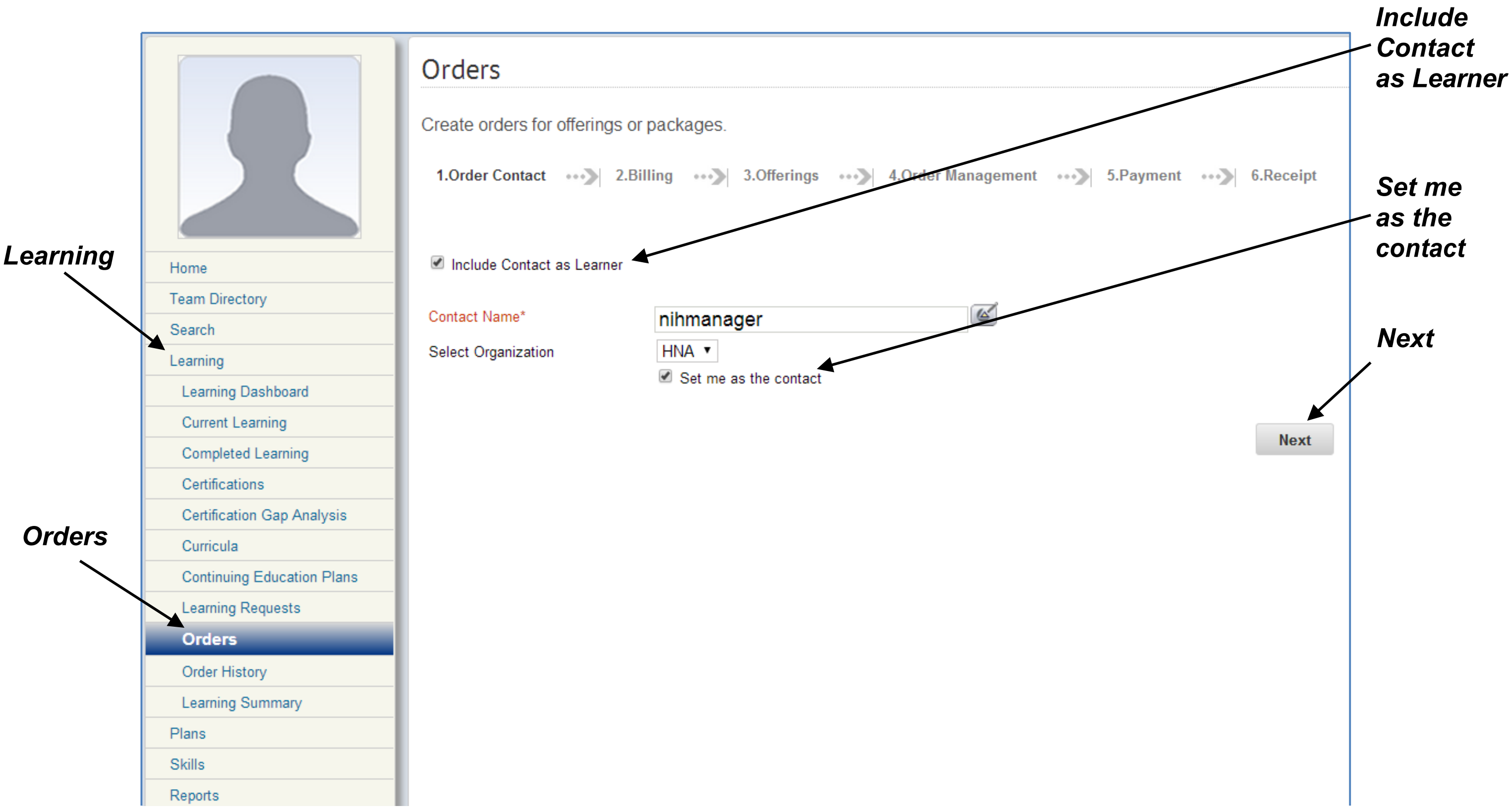
2. Click on the **My Team** icon on the menu bar.



NOTE: If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH LMS administrators can be found at. https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click the **Learning** link on the left menu.

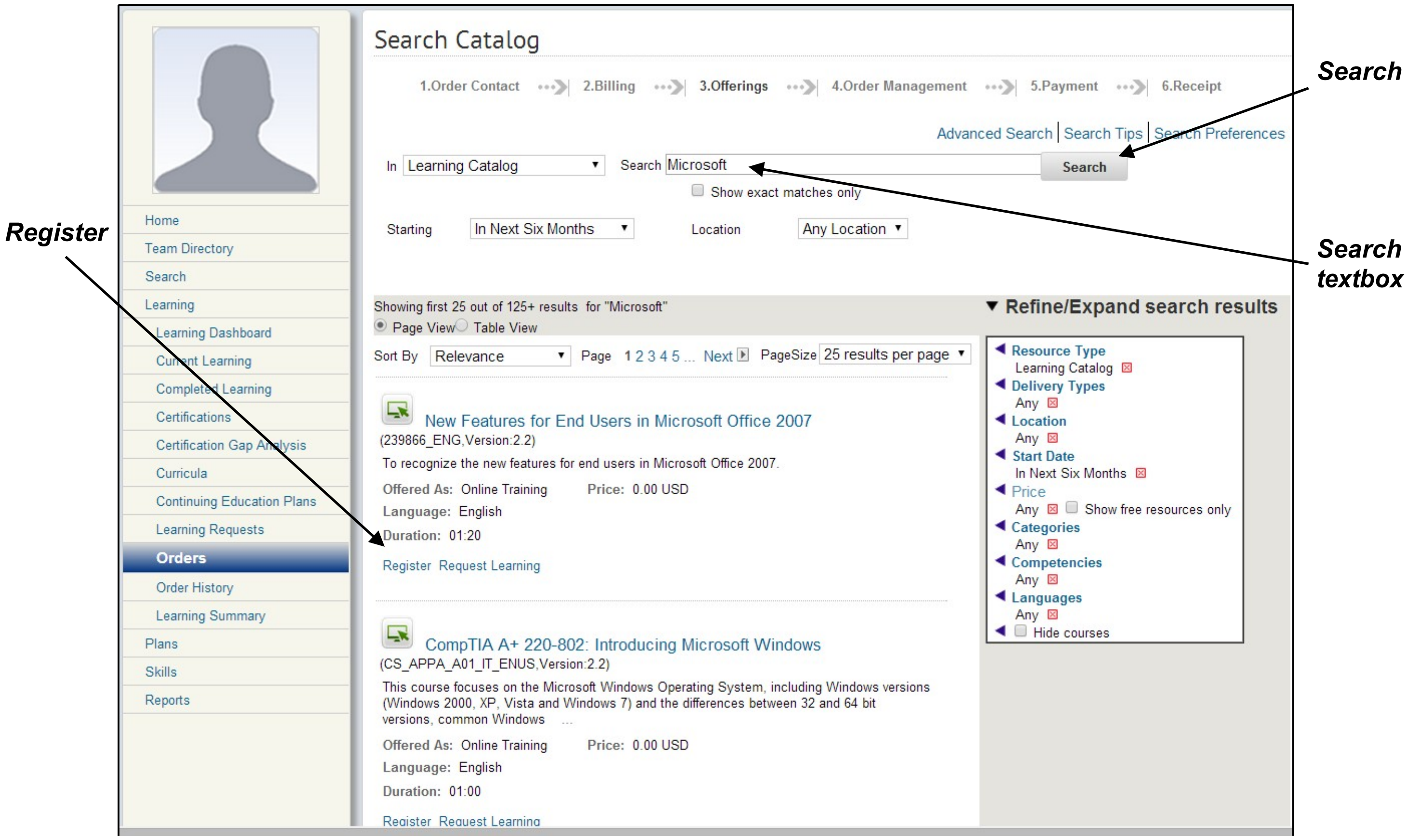
4. Click the **Orders** link on the left menu.



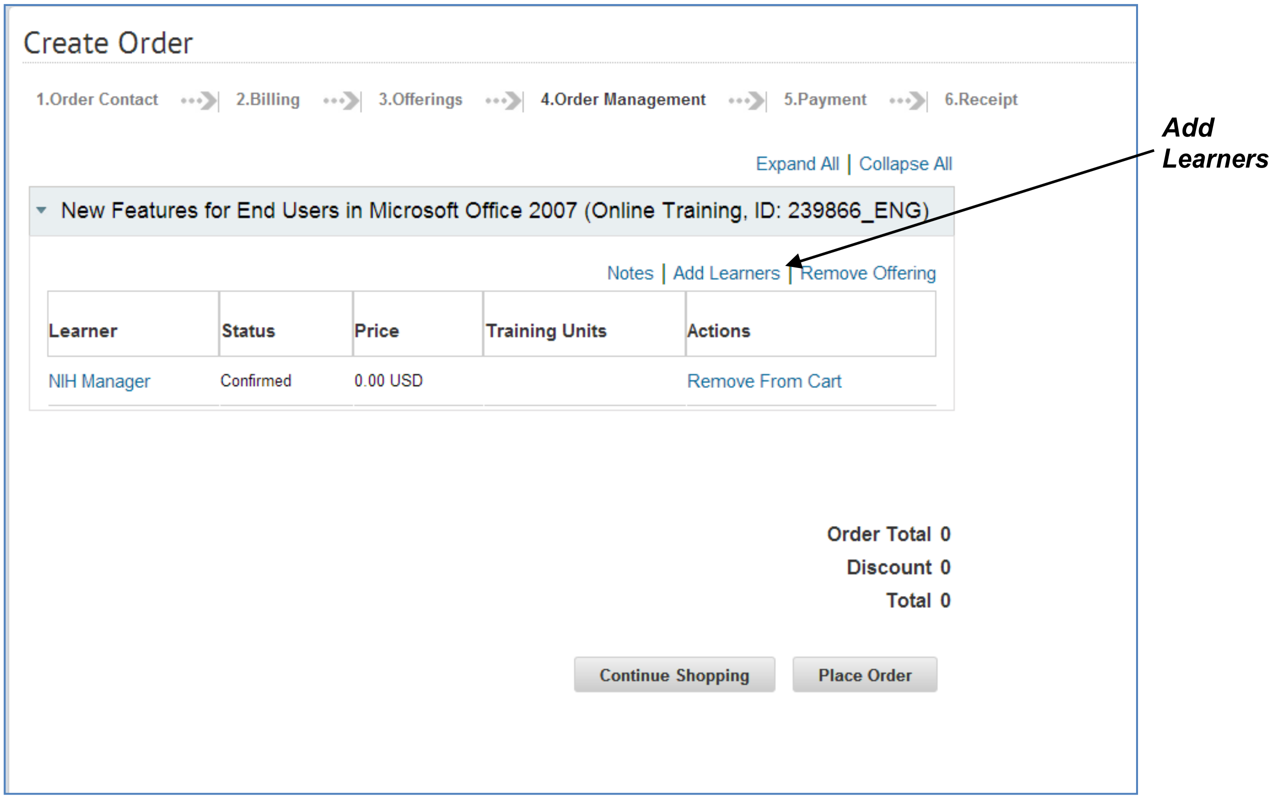
Note: If you want to be the contact for the order leave the **Set me as contact** checkbox checked. If not click on it to uncheck the checkbox and add a new contact for the order.

Note: If the Contact is the same as the Learner leave the **Include Contact as Learner** checkbox checked. If not, click on it to uncheck the checkbox.

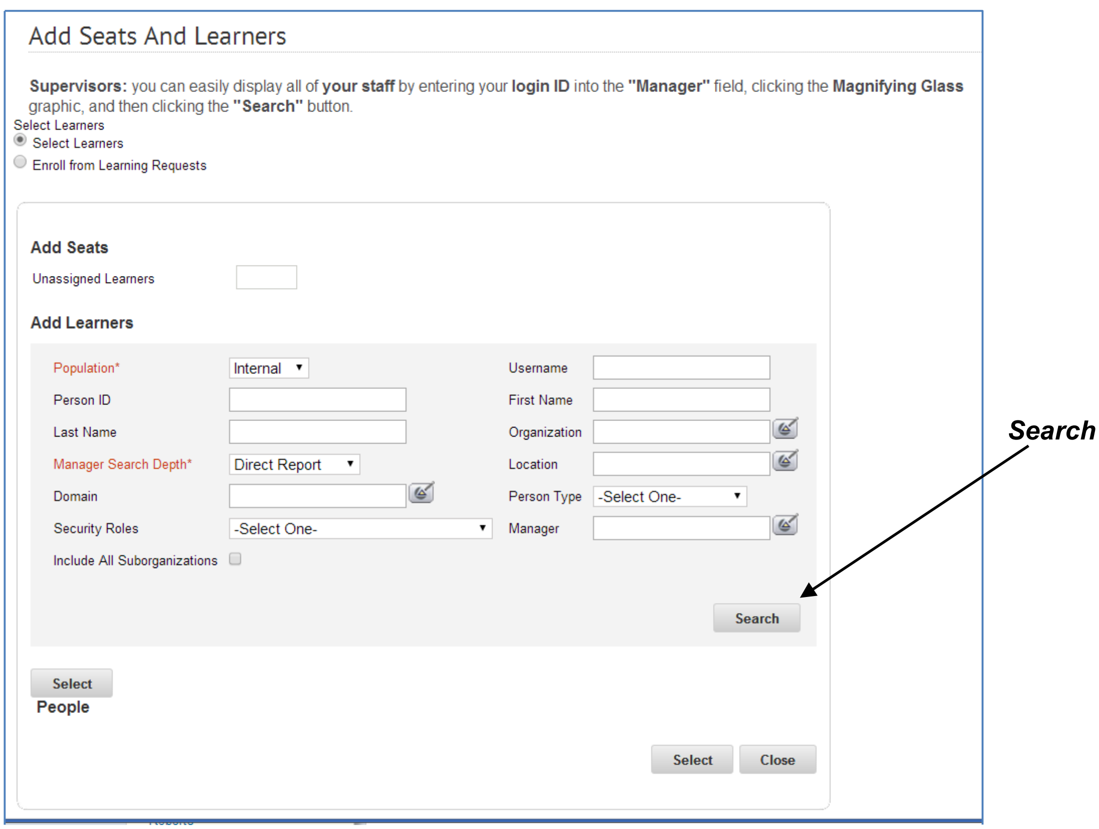
5. Click **Next.**
6. Enter the name of the course you want to find in the **Search** textbox.
7. Click **Search.**
8. Click **Register** associated with the offering.



9. Click **Add Learners**.



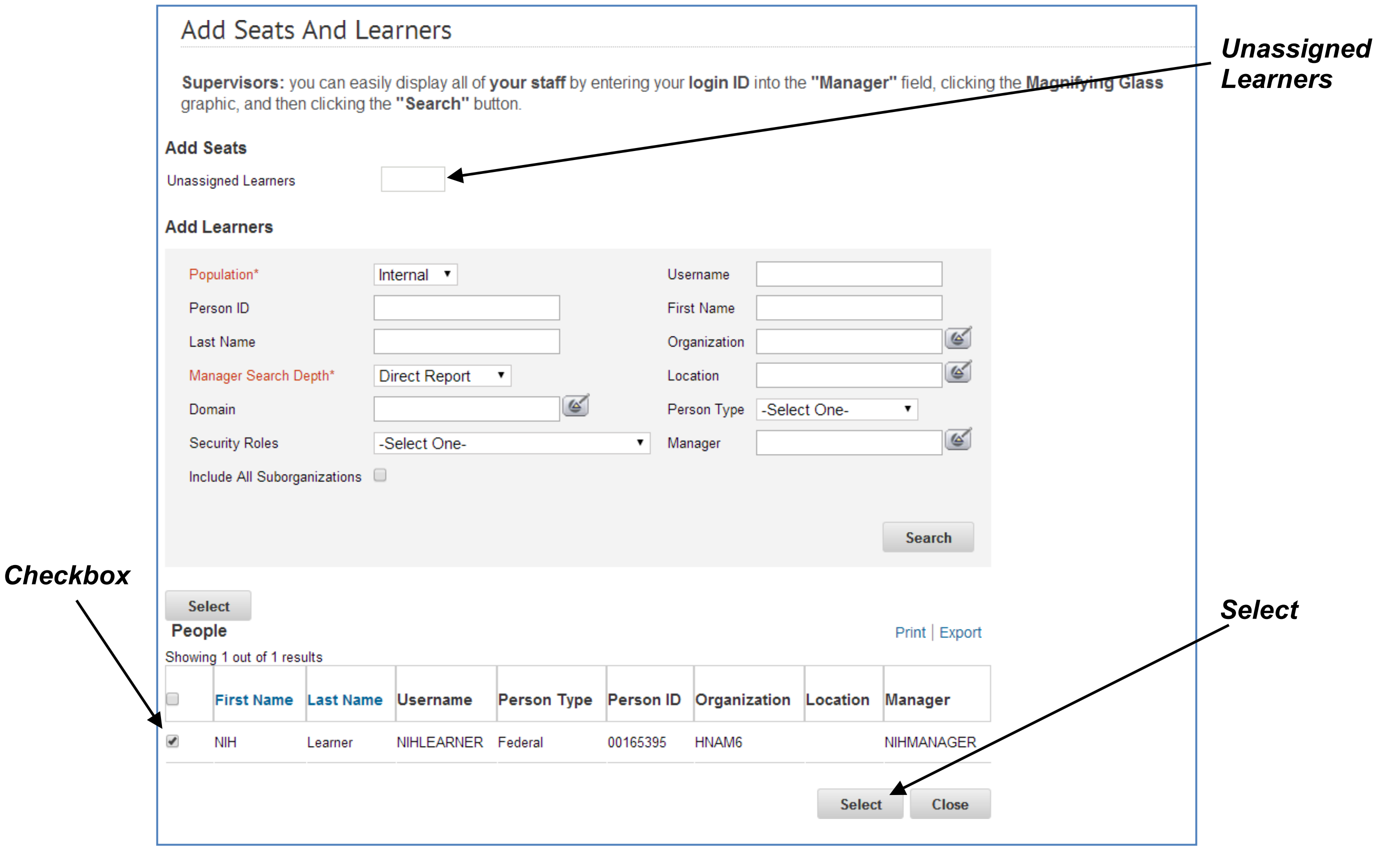
10. Enter search criteria for the team member then click **Search**.



NOTE: Clicking **Search** without entering any criteria will display all of your team members.

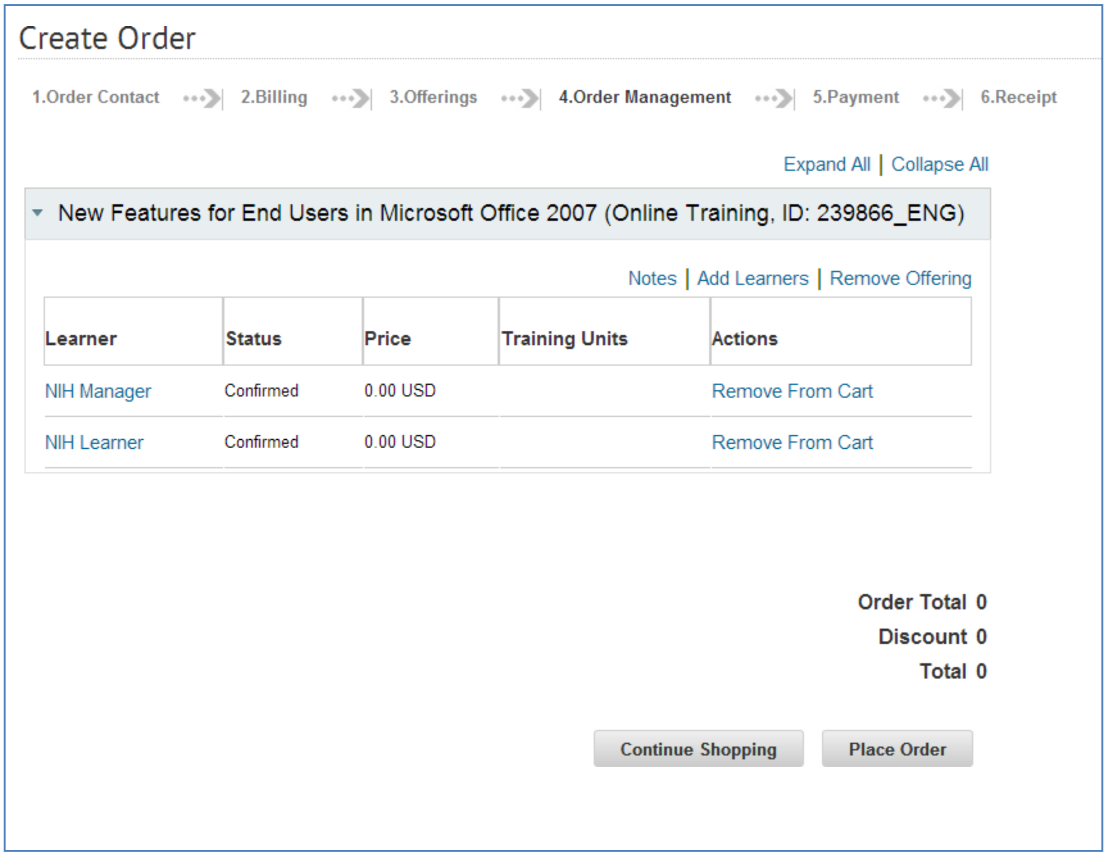
11. Click the **Checkbox** associated with each team member you wish to register.

12. Click **Select**.



NOTE: If you want to hold seats in the offering for your staff and you do not know which person(s) will be attending, you can enter a number in **Unassigned Learners**.

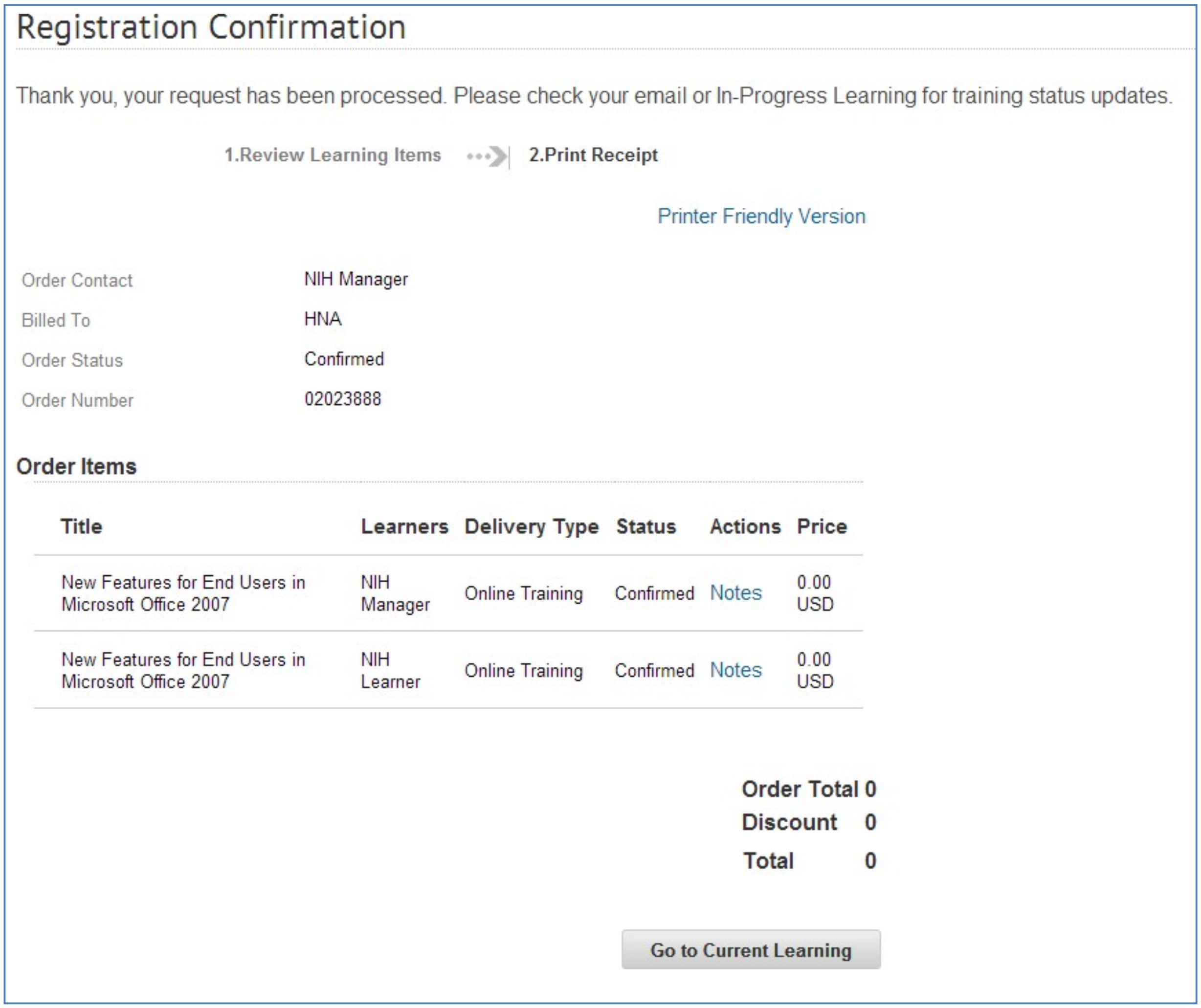
13. You will now be taken back to the **Create Order** screen.



Note: You can repeat Steps 9-12 to add more Learners.

14. Click **Place Order**

15. The **Registration Confirmation** screen will be displayed. You may print this screen for your records; however, this information can be retrieved at any time.



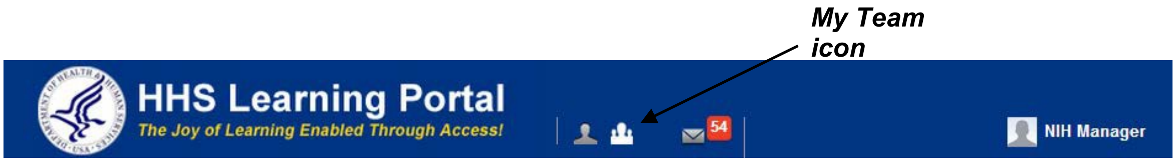
Important: NIH Training course offerings **that have tuition must contain a valid CAN** to ensure the proper obligation of funds in NBS.

VIEW TEAM ORDER HISTORY

STEP-BY-STEP (VIEW TEAM ORDER HISTORY)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at:
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.



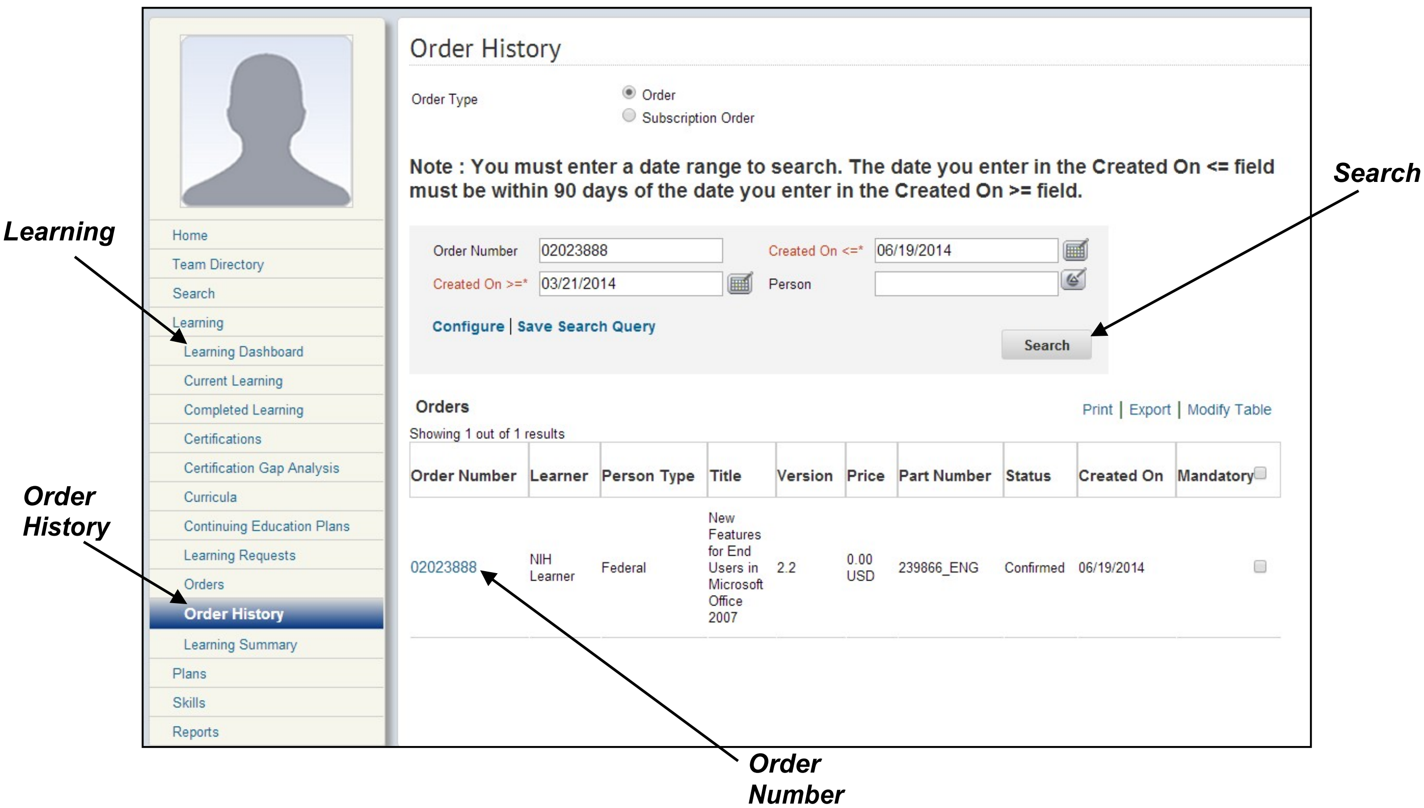
NOTE: If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH LMS administrators can be found at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click the **Learning** link on the left**.**

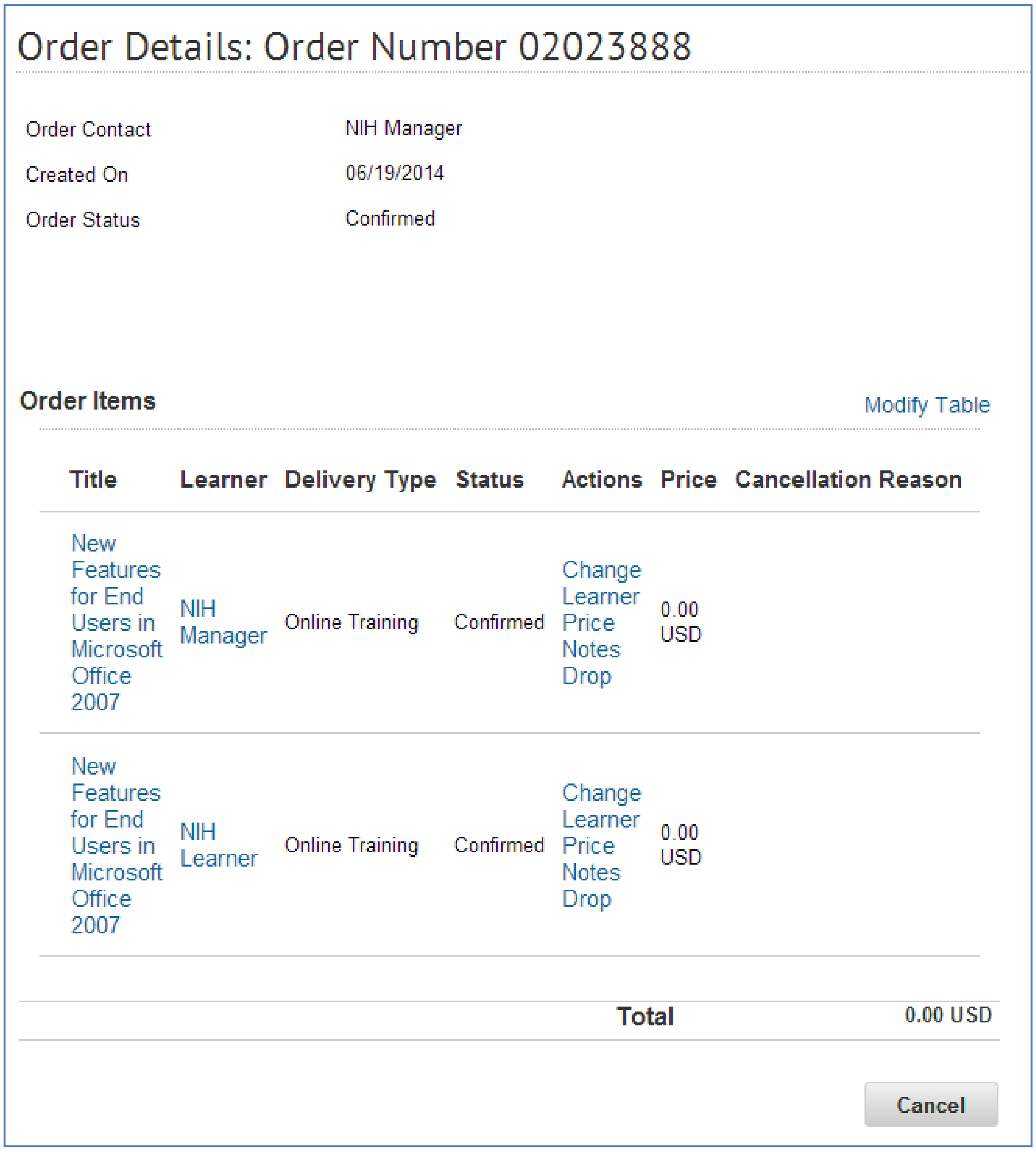
4. Click the **Order History** link on the left.

5. Enter search criteria for the order then click **Search**.

6. Click the **Order Number** you wish to view.



7. You will now see the Order Details screen.



Order Details: Order Number 02023888

Order Contact	NIH Manager
Created On	06/19/2014
Order Status	Confirmed

Order Items

Modify Table

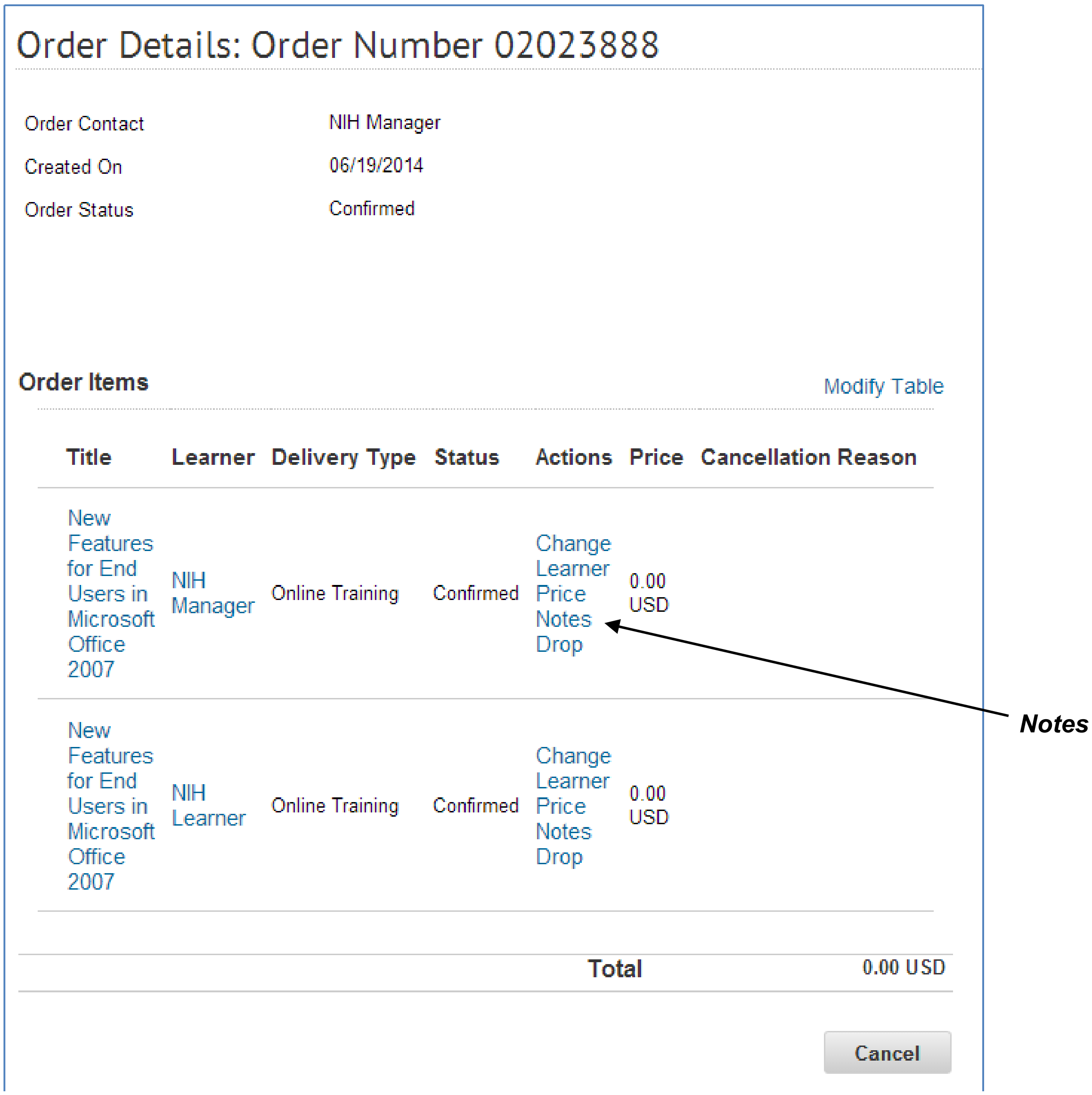
Title	Learner	Delivery Type	Status	Actions	Price	Cancellation Reason
New Features for End Users in Microsoft Office 2007	NIH Manager	Online Training	Confirmed	Change Learner Price Notes Drop	0.00 USD	
New Features for End Users in Microsoft Office 2007	NIH Learner	Online Training	Confirmed	Change Learner Price Notes Drop	0.00 USD	

Total 0.00 USD

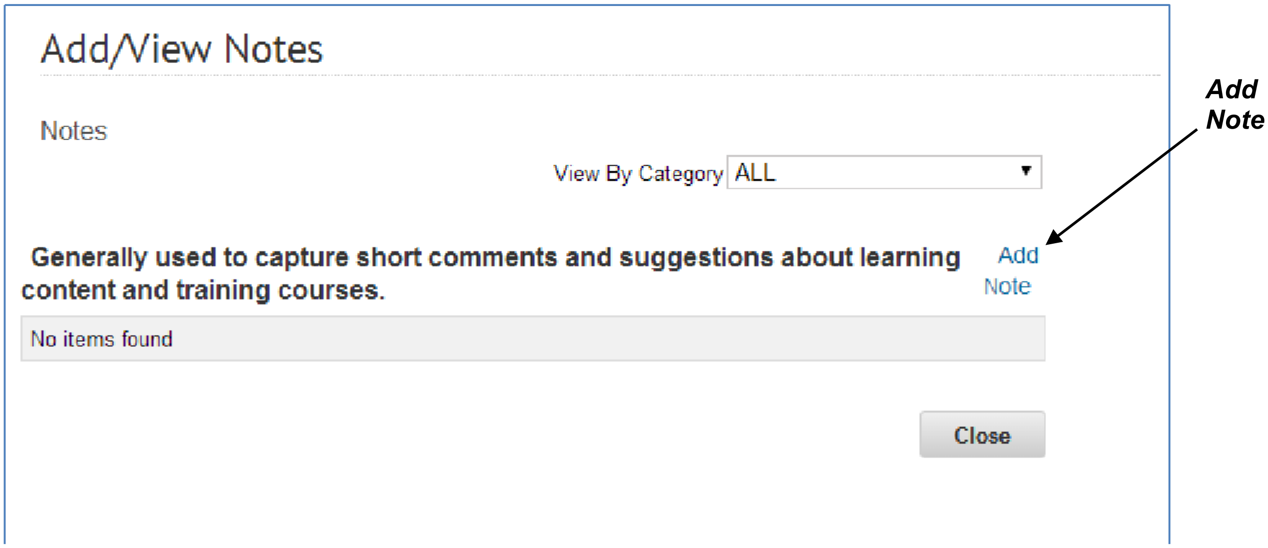
Cancel

STEP-BY-STEP (ACTIONS: ADD THE CAN TO AN ORDER)

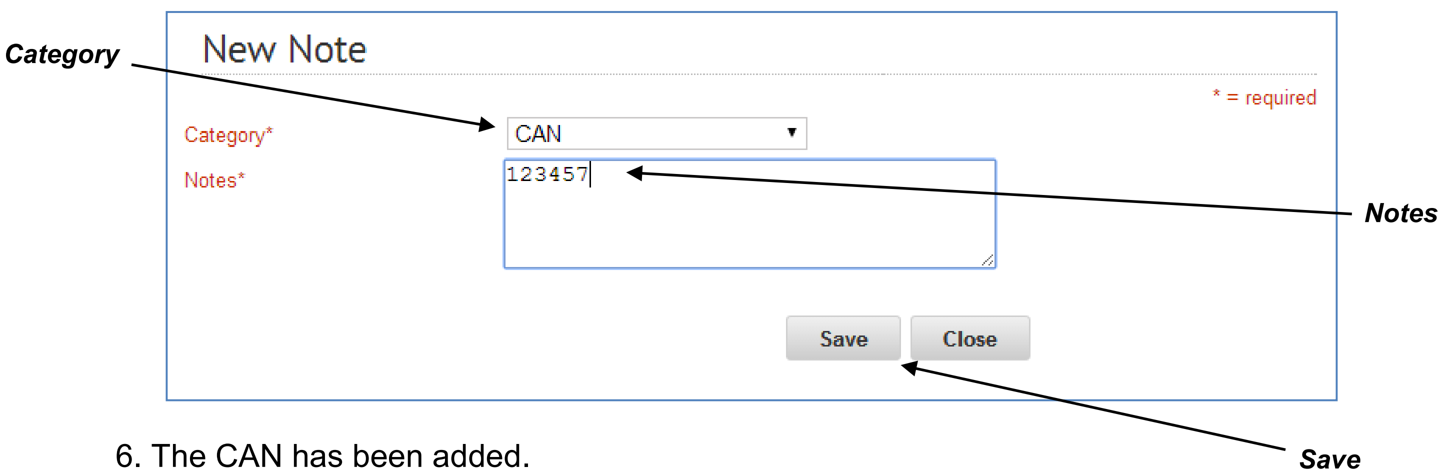
1. View the order for the learner. (See View Team Order History instructions above for details)



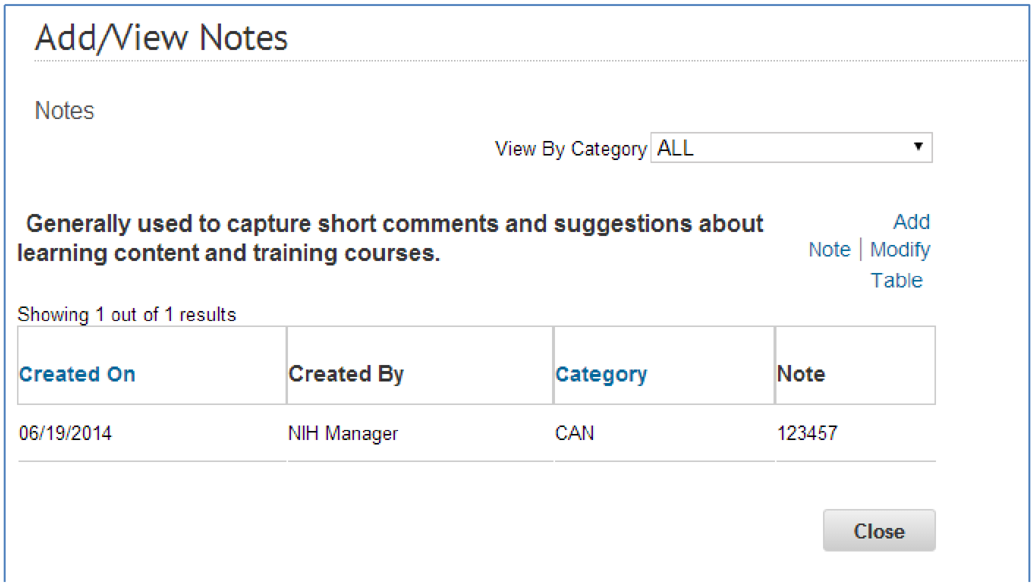
2. Click the **Notes** link.



3. Click the **Add Note** link.
4. Select **CAN** from the **Category drop down** list and enter the CAN number on the **Notes** section.
5. Click **Save**.



6. The CAN has been added.



Note: The CAN field only accepts the 7 digits CAN. Fiscal year information is not necessary. The CAN number used in this example is for instructional purposes only and is not a real/valid CAN number.

MANAGING CERTIFICATIONS

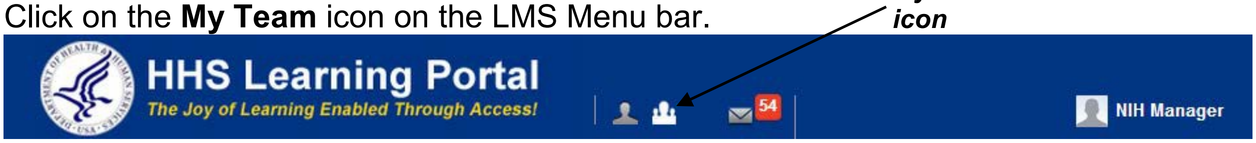
STEP-BY-STEP (VIEW TEAM MEMBER CERTIFICATIONS)

1. Log on to the LMS.

   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: hhttps://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.

   My Team icon

   NOTE: If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at. https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf.

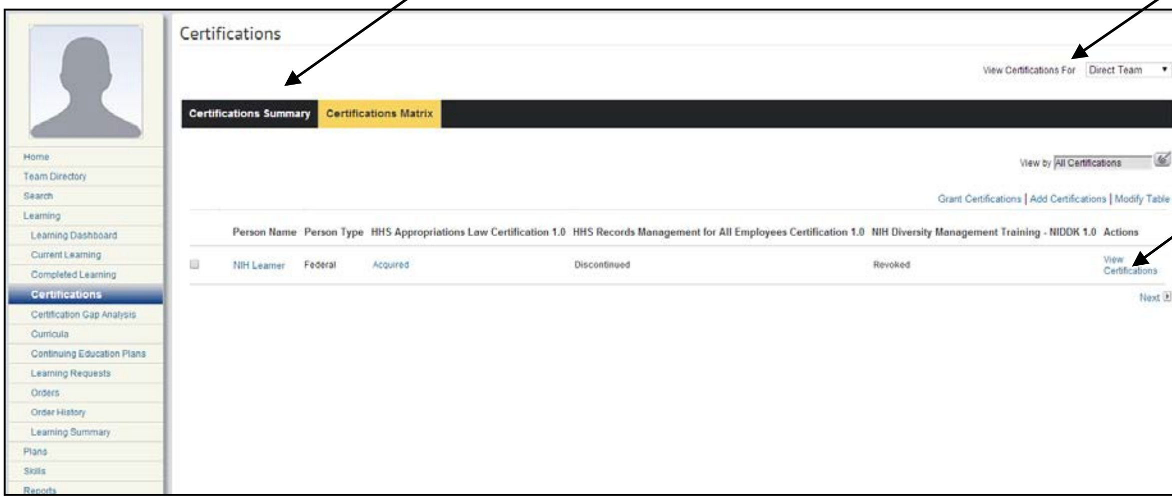
3. Click the **Learning** link on the left.

4. Click the **Certifications** link on the left.

NOTE: You may view team members on your alternate team by clicking the **View Certifications for** drop-down menu and selecting Alternate Team.

NOTE: To view a summary of your team's certifications, click the **Certifications Summary** tab.

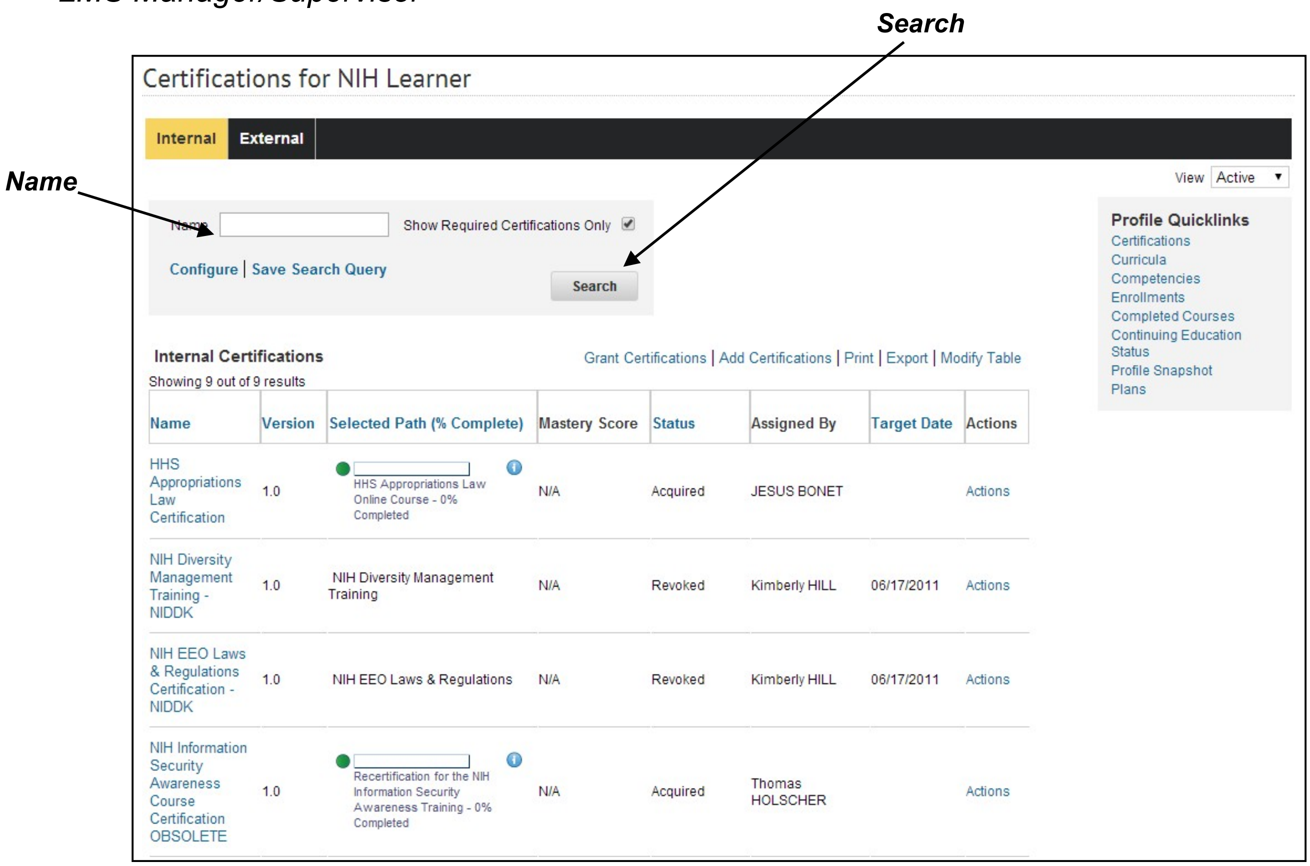
5. Click **View Certifications** in the **Actions** column on the same line as the team member.



6. You will now see a list of certifications for your team member.

   NOTE: No Items Found will be displayed if the team member is not enrolled in a certification.

   NOTE: If the list is long, you may enter the name of a certification in the **Name** field then click **Search** to quickly find and view the certification status.

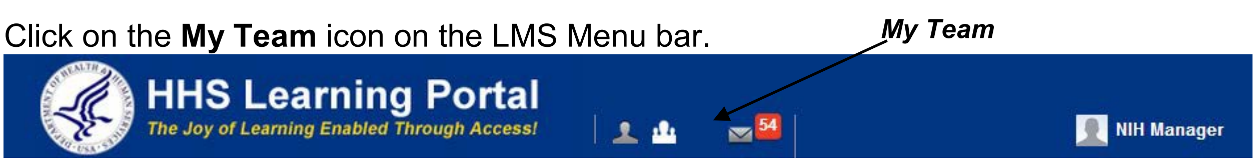


7. You can now view the status and percent complete for the certification path.

STEP-BY-STEP (ADD CERTIFICATIONS TO TEAM MEMBERS)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at:
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.



   NOTE: If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at.
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

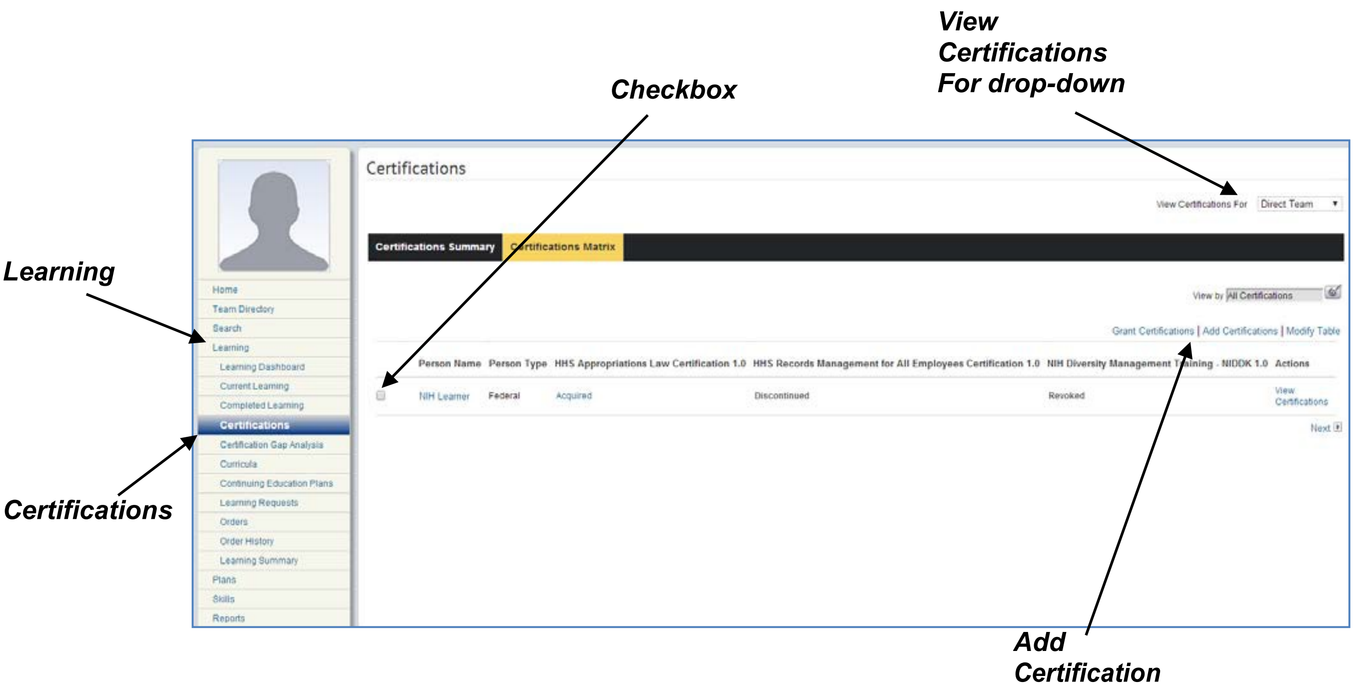
3. Click the **Learning** link on the left.

4. Select **Certifications** from the left menu.

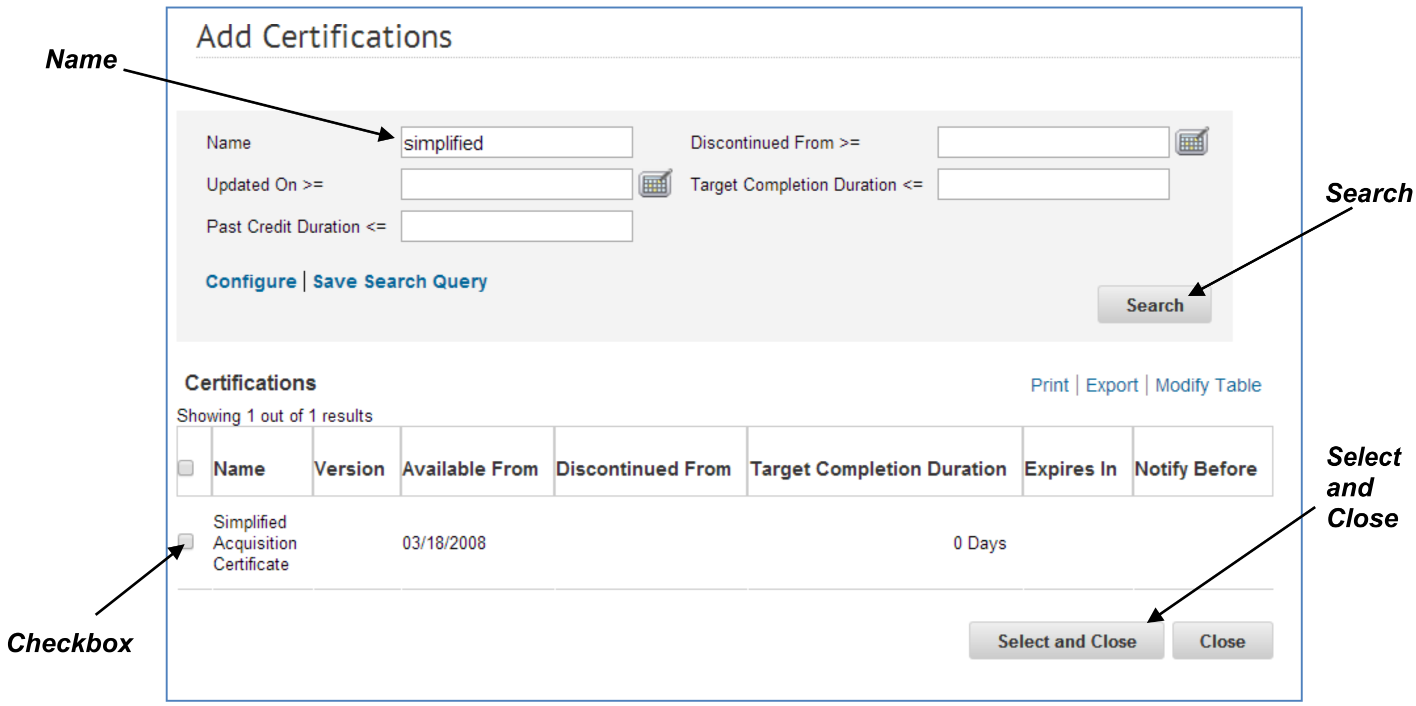
NOTE: You may view team members on your alternate team by clicking the **View Certifications for** drop-down menu and selecting Alternate Team.

5. Select the **checkbox** to the left of your team member's name.

6. Click the **Add Certification** link.



7. Type the name of the certification in the **name** field then click **Search**.



8. Click the checkbox to the left of the Certification name and click **Select and Close.**

9. The certification will now be added to the team member's learning plan.

COMPETENCIES

A competency is a skill, knowledge, or behavior that can be measured, calculated, acquired, specified, or tested. Examples of competencies include "Java Programming", "Written Communications", "Product Knowledge", and "People Skills". A competency consists of one or more proficiency levels, which represent the scale on which the competency is measured. Examples of proficiency levels used at NIH include "Fundamental Awareness", "Novice", "Intermediate", "Advanced", and "Expert".

For general information about competencies and how to use them for your team's professional development, visit http://hr.od.nih.gov/workingatnih/competencies/default.htm.

The LMS allows you to assign competencies to your team members that you want them to work on. You may assess your team member's competency proficiency levels and find training to improve their skills and knowledge.

STEP-BY-STEP (VIEW COMPETENCY ROLLUP ACROSS TEAM)

1. Log on to the LMS.

   NOTE: For instruction about logging on, see the QRG-LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.

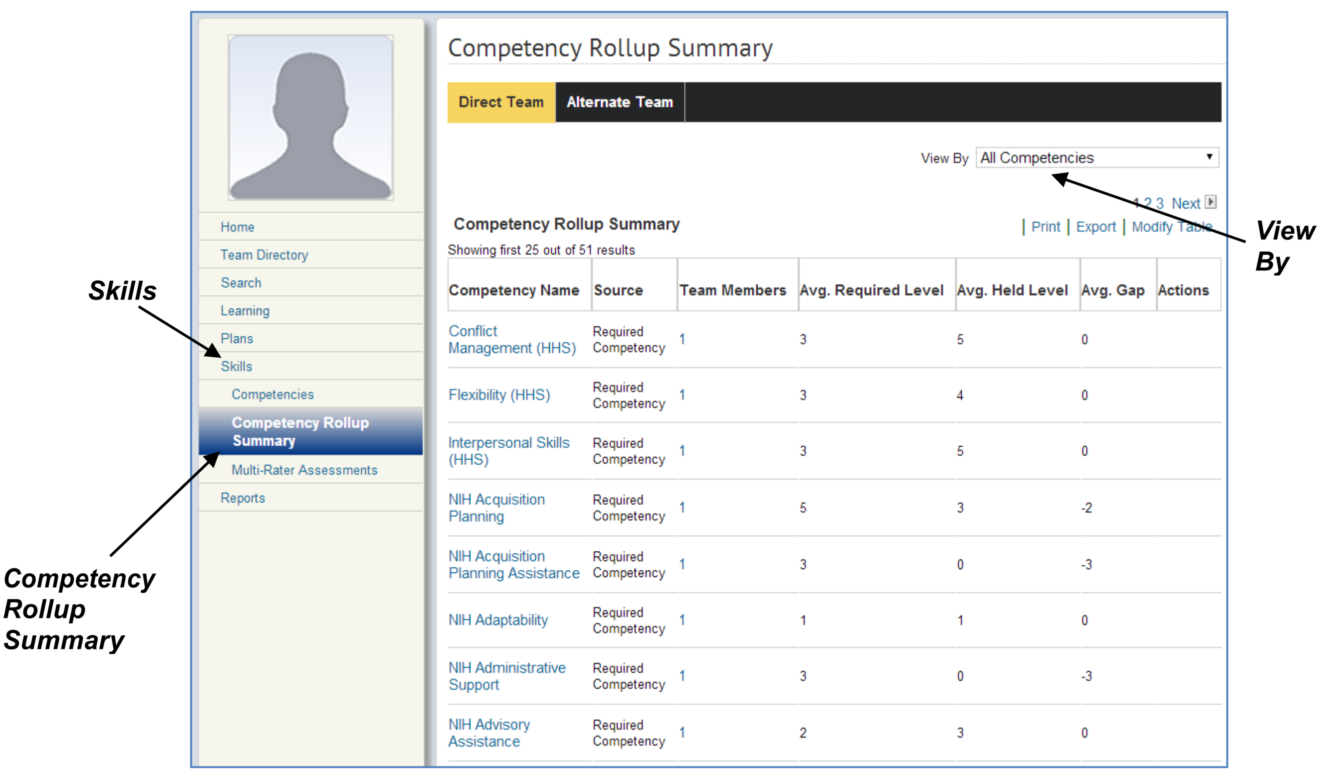
NOTE: If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH LMS administrators can be found at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click the **Skills** link on the left.

4. Click the **Competencies** link.

5. Click **Competency Rollup Summary** from the left menu.

NOTE: You may click the **Alternate Team** tab to view your alternate team members. Also, you may change which competencies you wish to view by selecting an option from the **View by** drop-down menu.



STEP-BY-STEP (VIEW TEAM MEMBER COMPETENCIES SUMMARY)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at:
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.

My Team icon

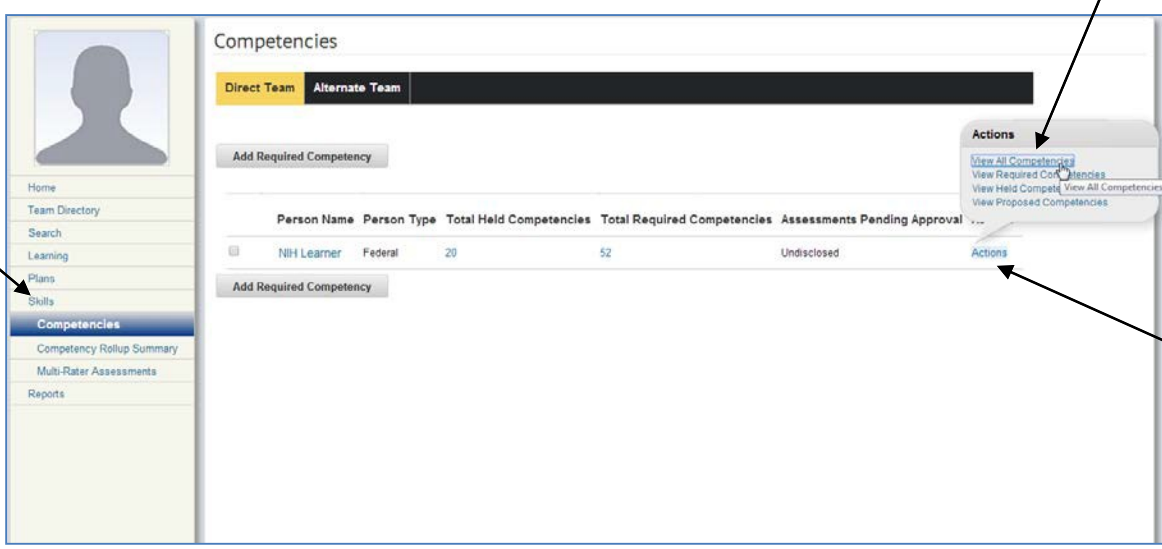
   NOTE: If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at.
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click the **Skills** link on the left.

4. Click **Actions** for the desired team member.

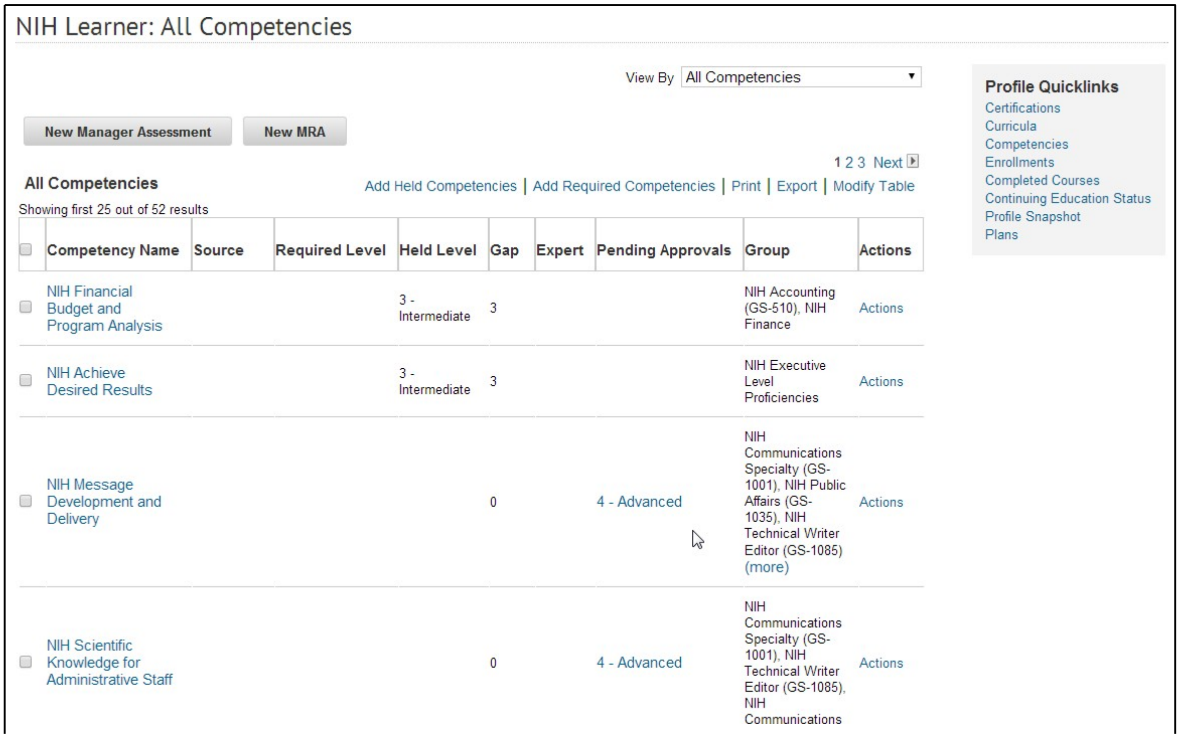
View All Competencies

Skills



Actions

5. Click **View All Competencies**.



	Competency Name	Source	Required Level	Held Level	Gap	Expert	Pending Approvals	Group	Actions
	NIH Financial Budget and Program Analysis			3 - Intermediate	3			NIH Accounting (GS-510), NIH Finance	Actions
	NIH Achieve Desired Results			3 - Intermediate	3			NIH Executive Level Proficiencies	Actions
	NIH Message Development and Delivery				0		4 - Advanced	NIH Communications Specialty (GS-1001), NIH Public Affairs (GS-1035), NIH Technical Writer Editor (GS-1085) (more)	Actions
	NIH Scientific Knowledge for Administrative Staff				0		4 - Advanced	NIH Communications Specialty (GS-1001), NIH Technical Writer Editor (GS-1085), NIH Communications	Actions

6. You will now see a summary of all required competencies for the team member.

STEP-BY-STEP (ACTIONS: DELETE A REQUIRED COMPETENCY)

1. Log on to the LMS.

   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.

My Team icon

NOTE: If there isn't a **My Team** icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at. https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click on the **Skills** link on the left.

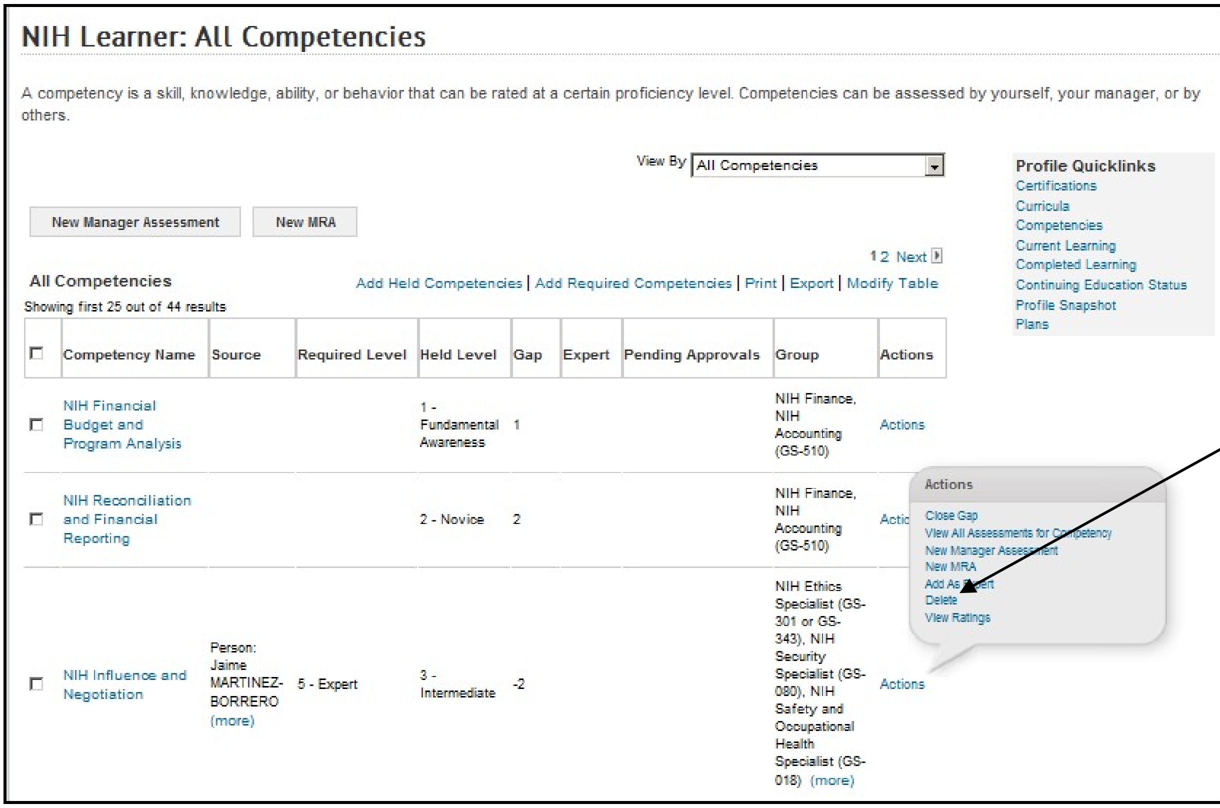
4. Click **Competencies** from the vertical navigation on the left side of the page.

5. Click Actions and then View All Competencies

6. Follow instructions to **View Team Member Competencies Summary** (Previous Section).

7. Click the **Actions** link in the row of the competency you want to delete.

8. Click **Delete**.



Delete

9. **Select** the source assigned to the competency.

Select

Remove

10. Click **Remove**.

11. Click **Ok** on the confirmation pop-up.

12. You will see a confirmation message that the competency was removed.

STEP-BY-STEP (ADD A REQUIRED COMPETENCY)

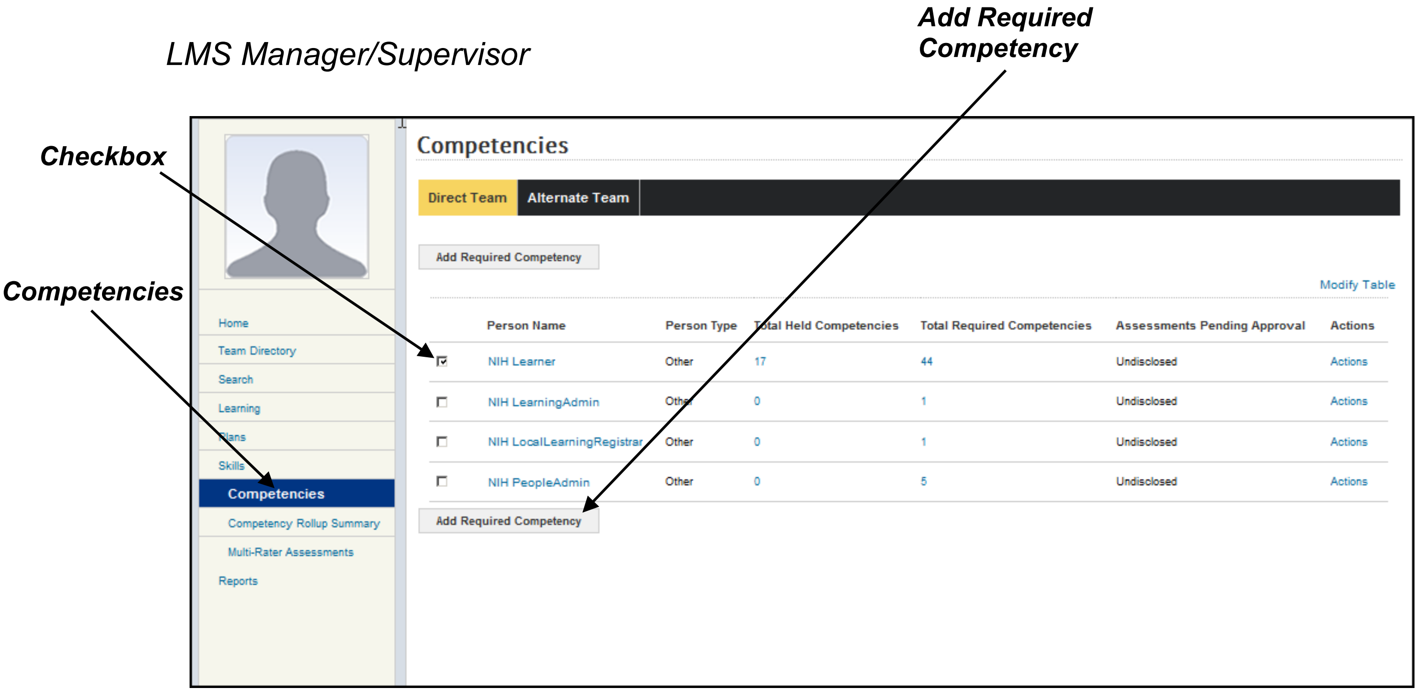
1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar..
   NOTE: If there isn't a drop down list, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at.
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf
3. Click on the **Skills** tab.

4. Click **Competencies** from the vertical navigation on the left side of the page.

5. Click the **checkbox** next to the name of one or more team members.

6. Click **Add Required Competency**.



7. Enter the name of the competency you wish to add in the **Name** field.

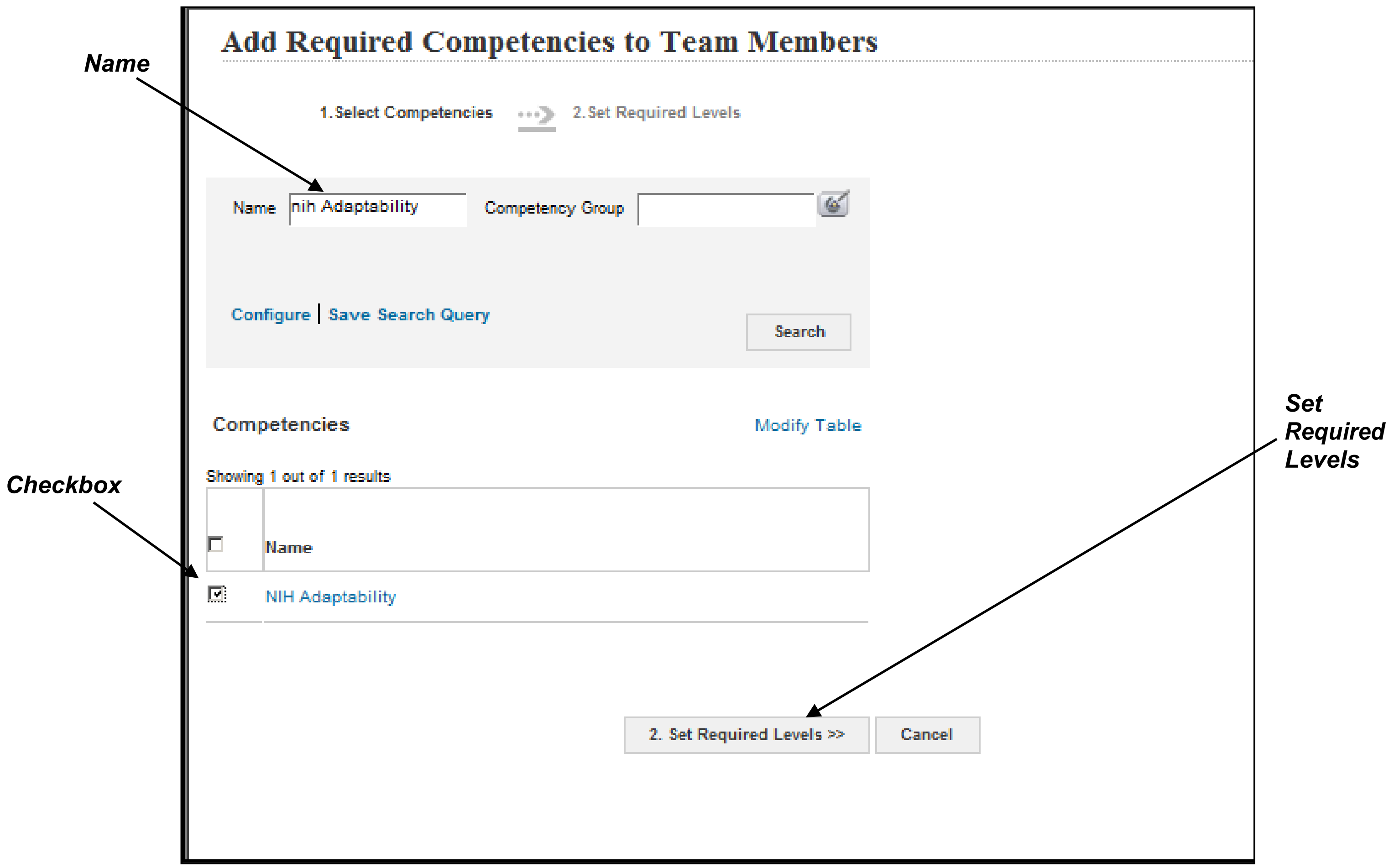
   NOTE: NIH competencies are prefixed with NIH.

8. Click **Search**.

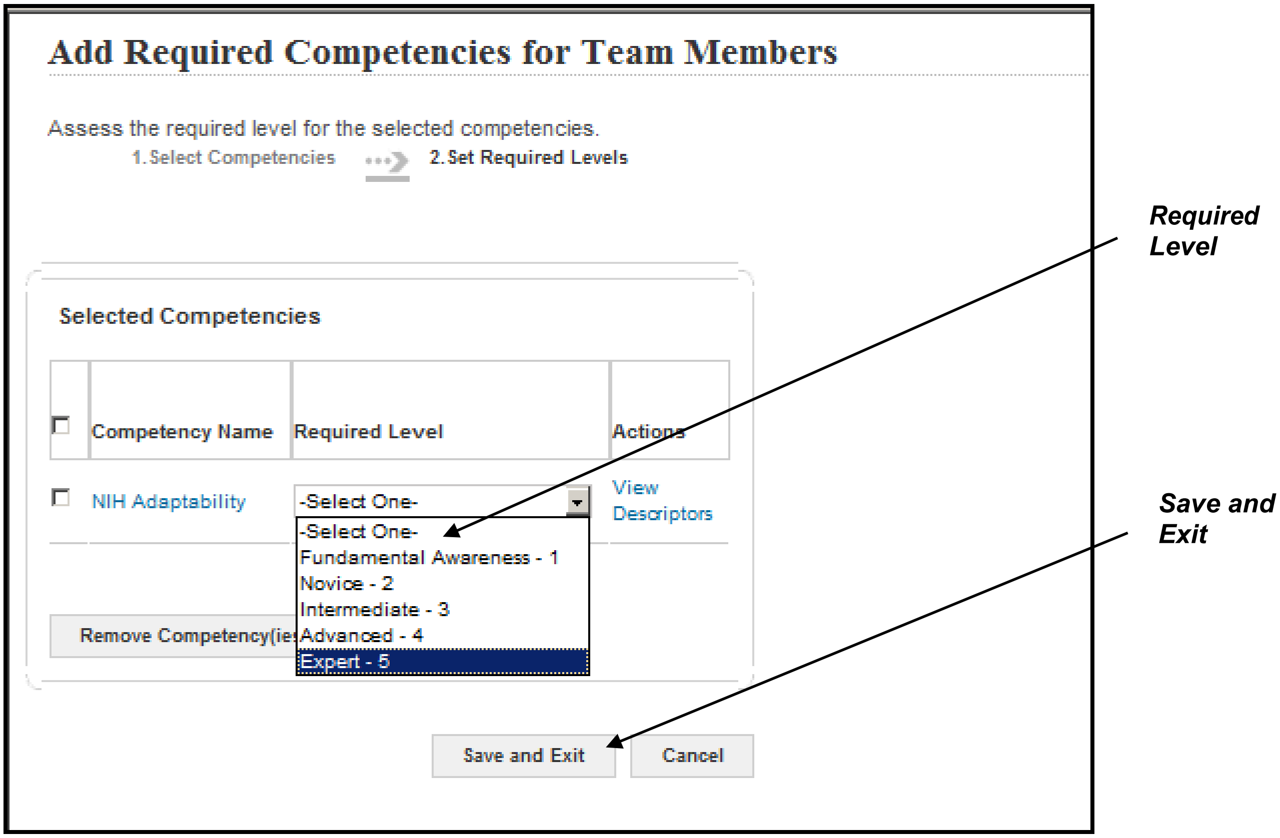
   NOTE: Clicking search without entering a competency will show all competencies in your search results.

9. Select the **checkbox** for the competency you wish to add.

10. Click Set Required Levels.



11. Select the **Required Level** you wish the team member to attain by selecting a level from the drop-down menu.



12. Click **Save and Exit**.

13. The competency will now be required by the team member.

STEP-BY-STEP (VIEW TEAM MEMBER ASSESSMENTS)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.
   NOTE: If there isn't a **My Team** icon, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click on the **Skills** tab.

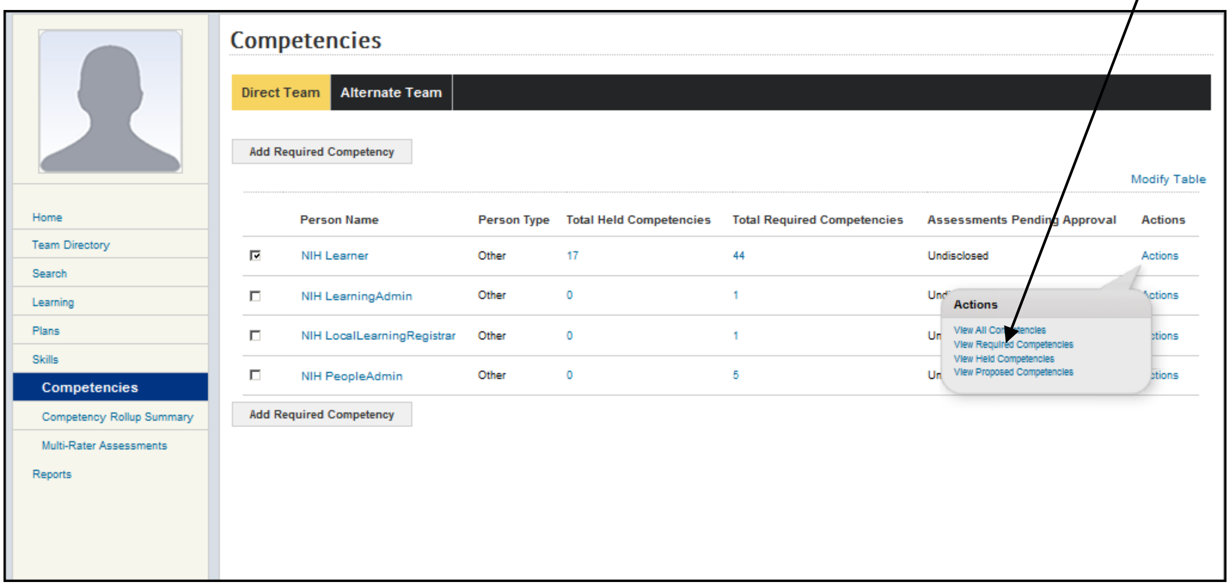
4. Click **Competencies** from the vertical navigation on the left side of the page.

5. Click the **Actions** link in the row of the team member whose assessments you want to view.

6. Click **View Required Competencies** for the desired team member.

   NOTE: Only competencies that have been assessed will yield results.

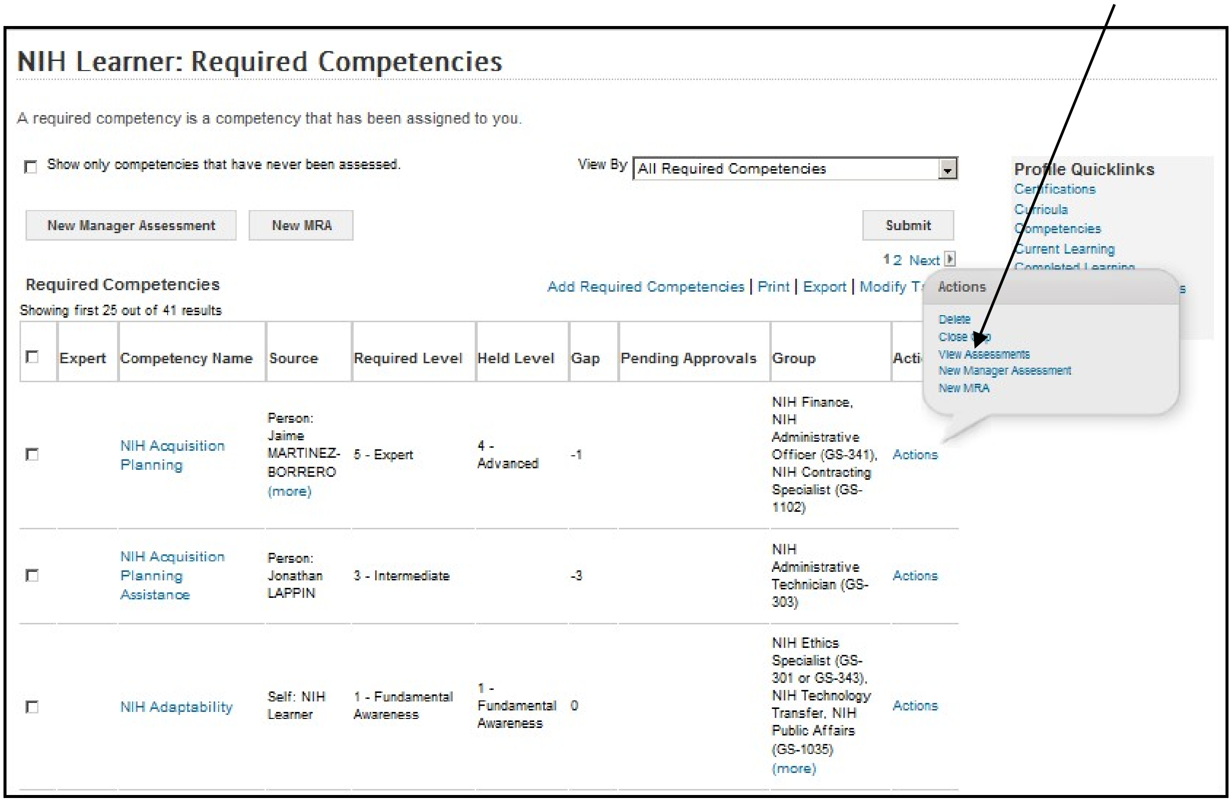
View Required Competencies



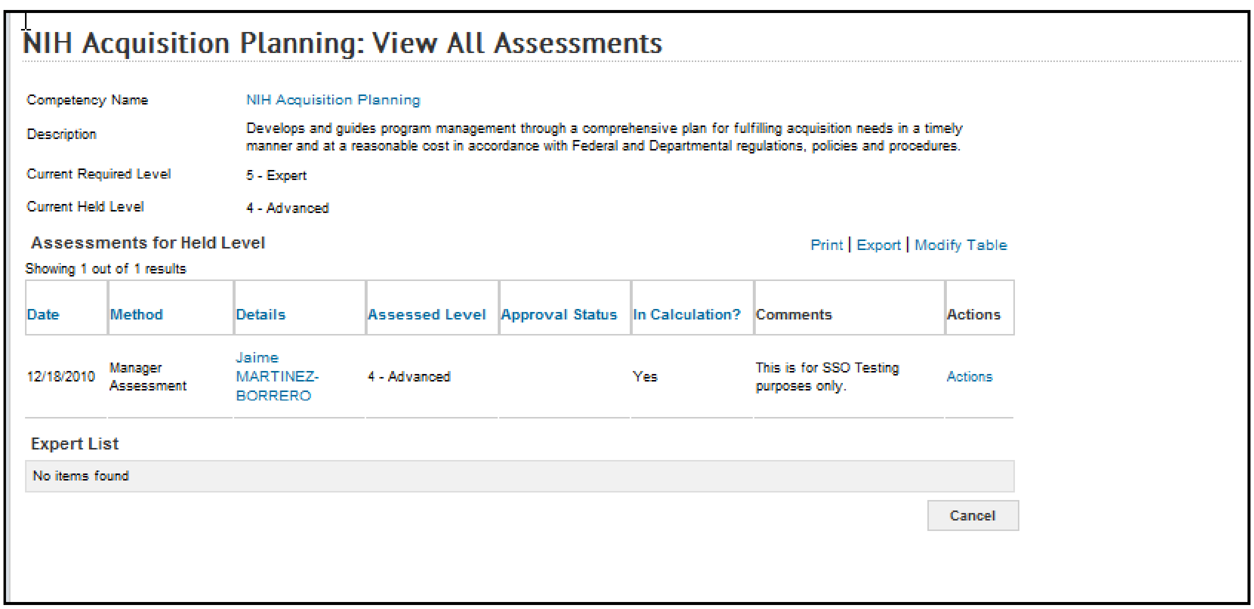
7. Click the **Actions** link in the row of the competency for which you'd like to view the assessment.

8. Click **View Assessments**.

View Assessments



9. You will now see the results of the assessment for the competency you selected.



STEP-BY-STEP (CREATE NEW MANAGER ASSESSMENT)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at:
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

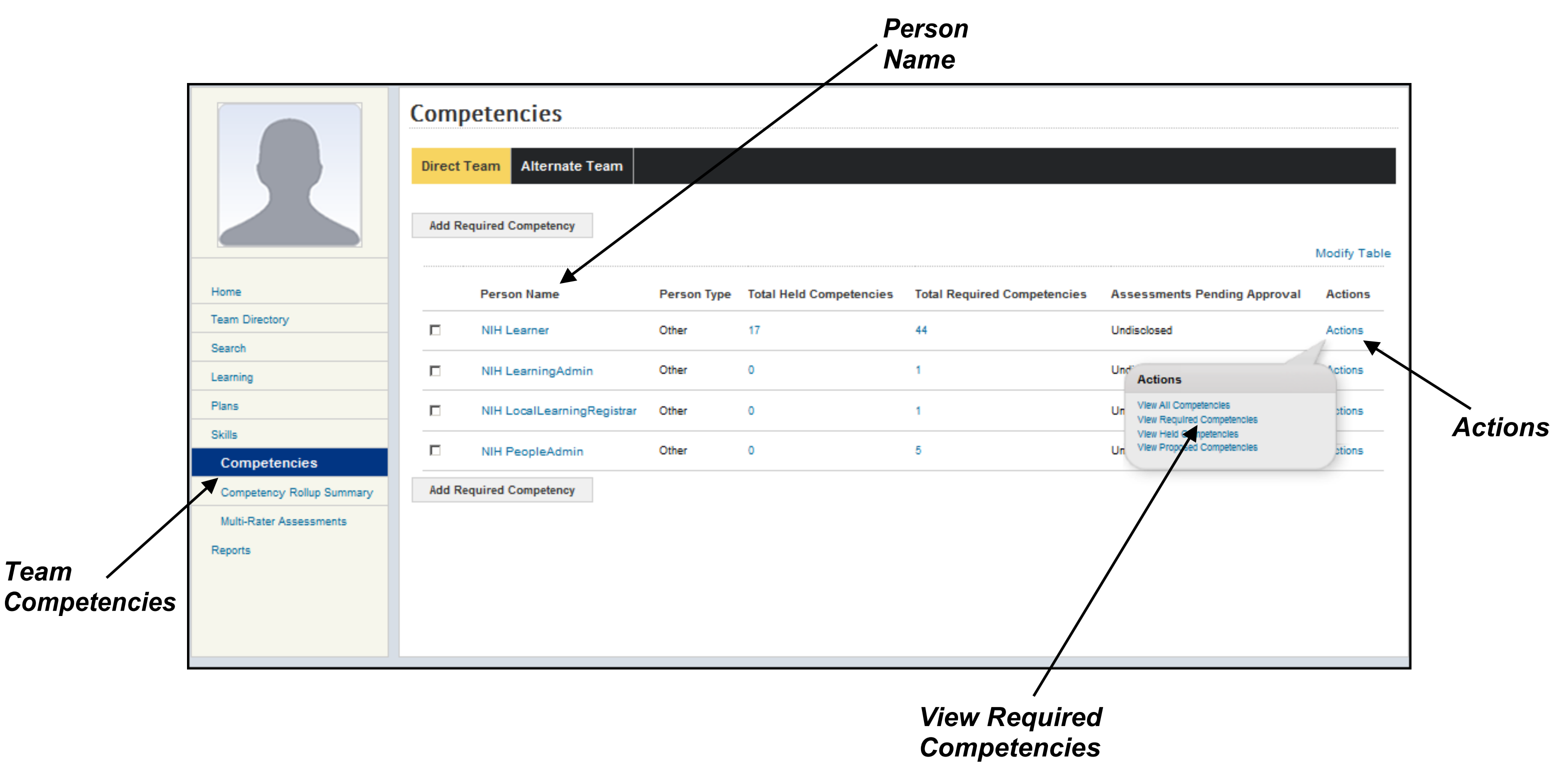
2. Click on the **My Team** icon on the LMS Menu bar..
   NOTE: If there isn't a **My Team** icon, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at
   https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

3. Click on the **Skills** tab.

4. Click **Competencies** from the vertical navigation on the left side of the page.

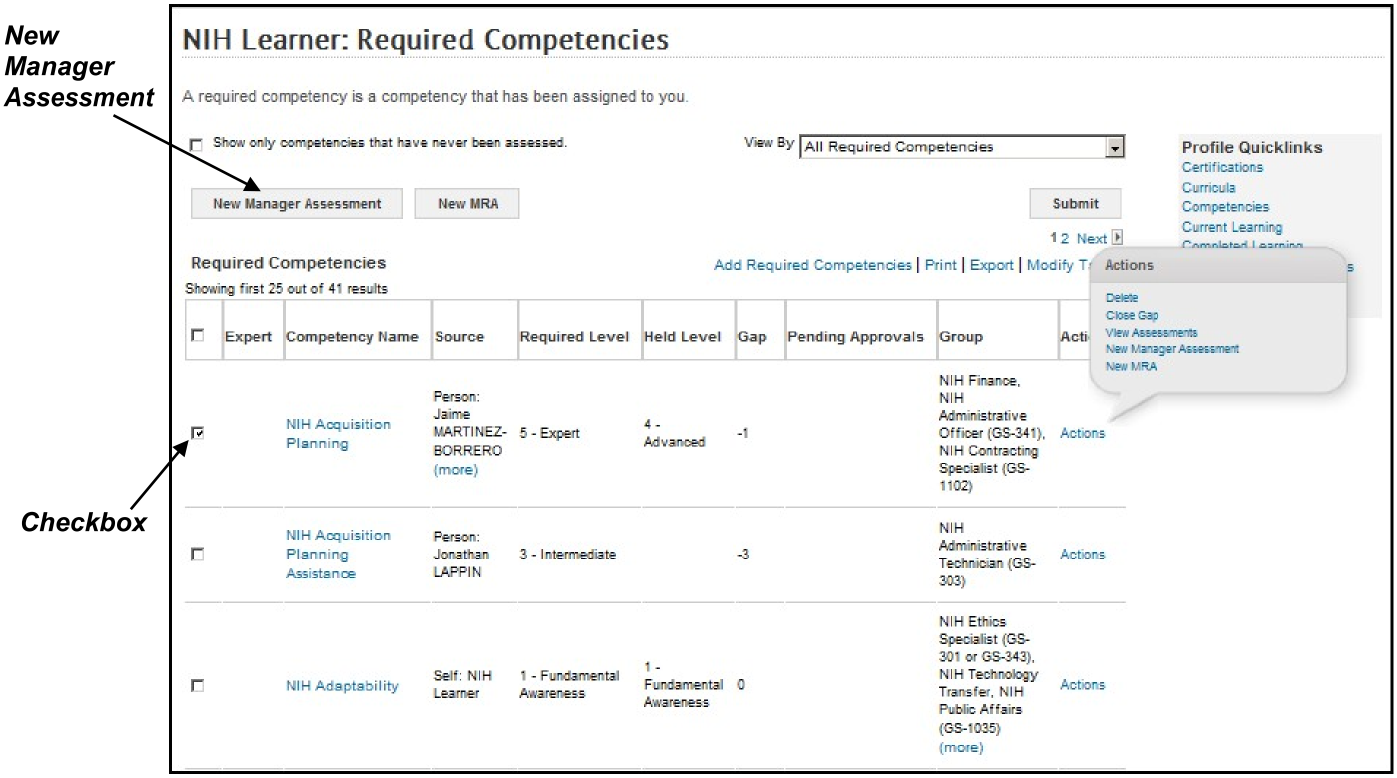
5. Click the **Action** link in the row of the team member for whom you want to create a new manager assessment.

6. Click **View Required Competencies**.

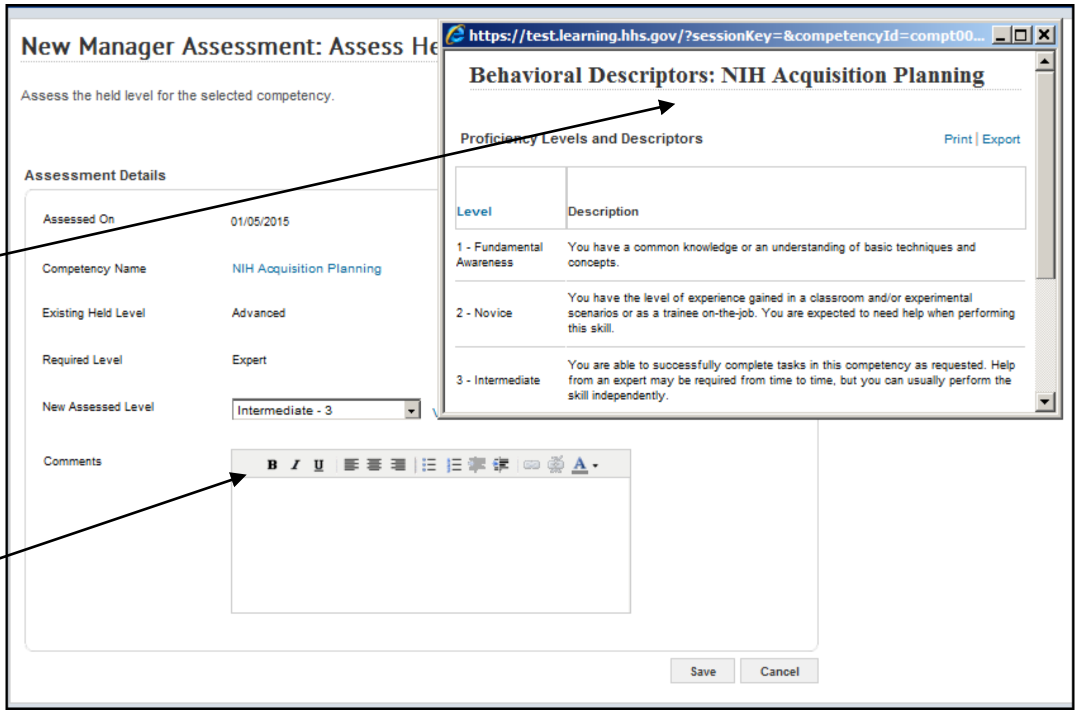


7. Click the **checkbox** next to the competencies that you want to create a new manager assessment.

8. Click New Manager Assessment tab.



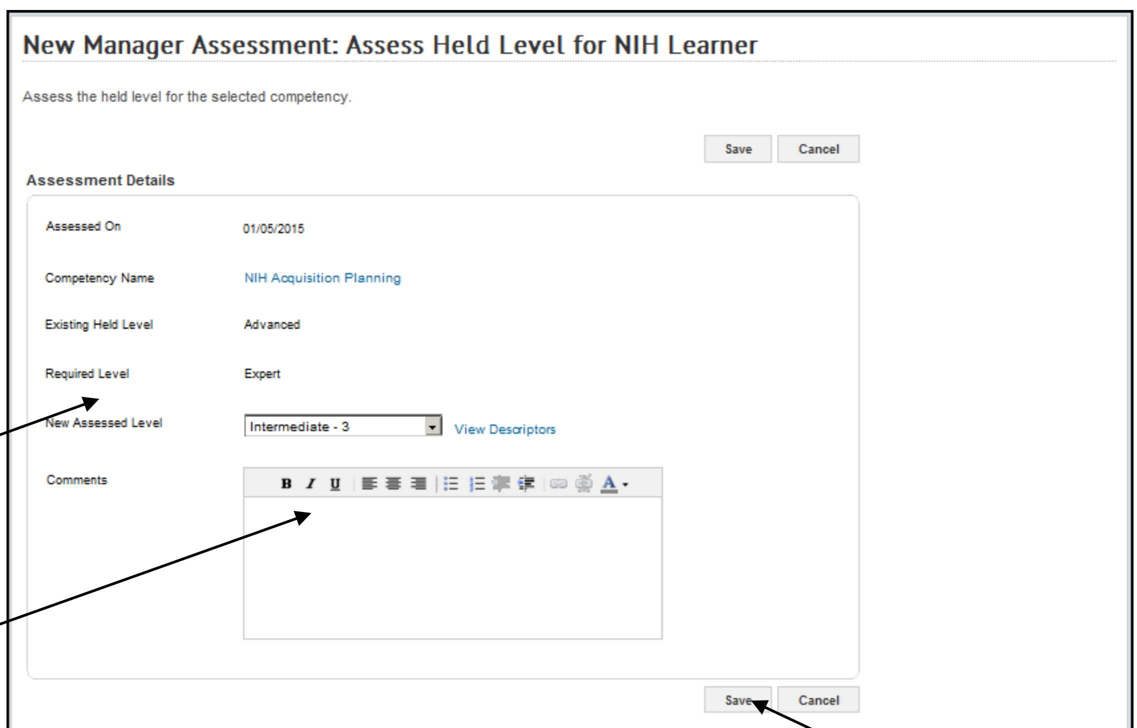
9. Select the **New Assessed Level** from the drop down menu.



NOTE: To view the descriptors for the levels, click the **View Descriptors** link.

11. Add **Comments** as needed.

12. Click **Save**.



13. The team member will now hold the new level for the competency.

REPORTS FOR THE MANAGER

RUNNING REPORTS

Under the **Reports** tab on the Team Home page, the manager/supervisor has access to a variety of reports in the LMS. Reports can be generated, exported, printed, emailed and subscribed to if desired. Below you will find instructions on how to work with reports in the LMS.

STEP-BY-STEP (GENERATE A REPORT)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.
   NOTE: If there isn't a **My Team** icon, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

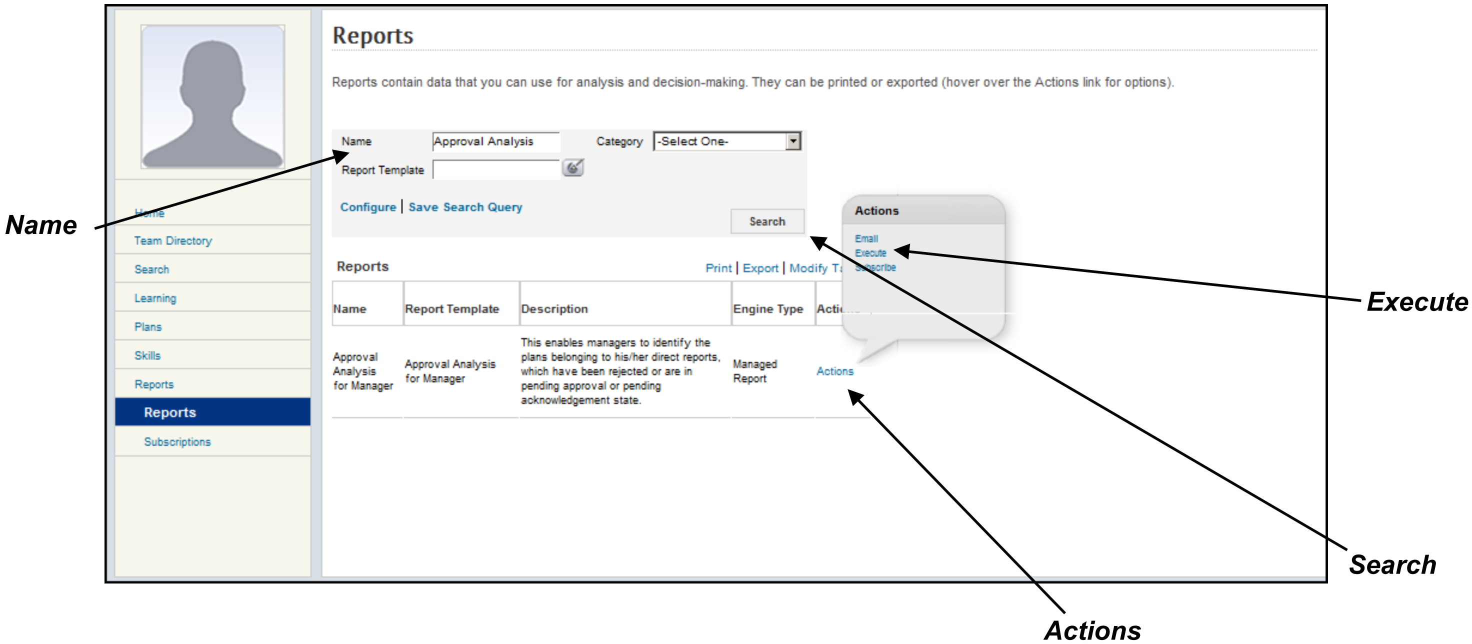
3. Click **Reports**.

4. Enter the name of the report which you wish to view into the **Name** field.

5. Click **Search**.
   NOTE: If click **Search** without completing the search fields, all available reports will be displayed.

6. Click the **Actions** link.

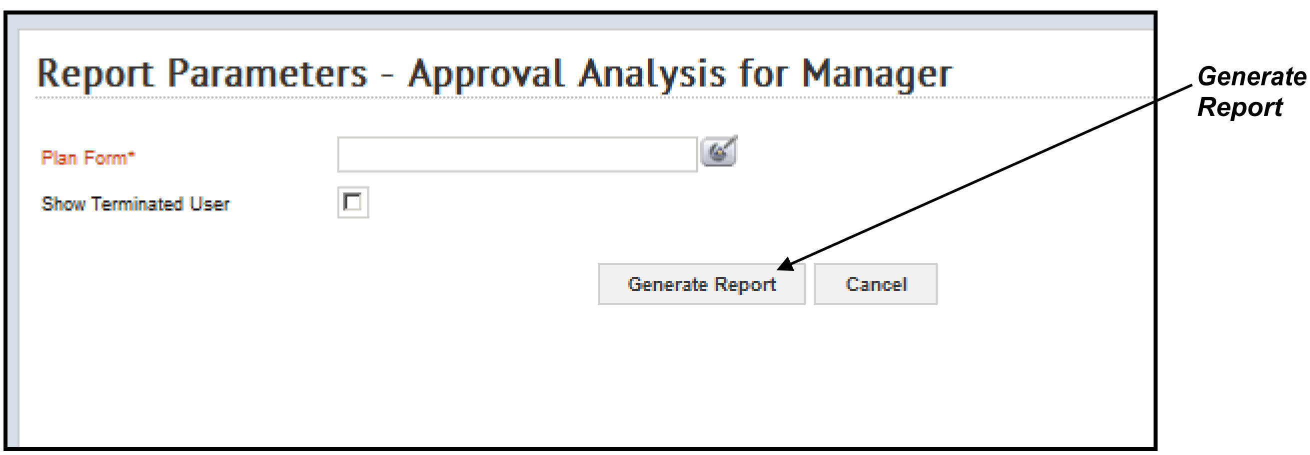
7. Click **Execute**.



8. Enter values for all **required fields**.

   NOTE: Required field names are displayed with red letters and must contain a value to run the report. All other fields are optional.

9. Click **Generate report** when you are finished entering in report parameters.



10. You will now see the report on your screen.

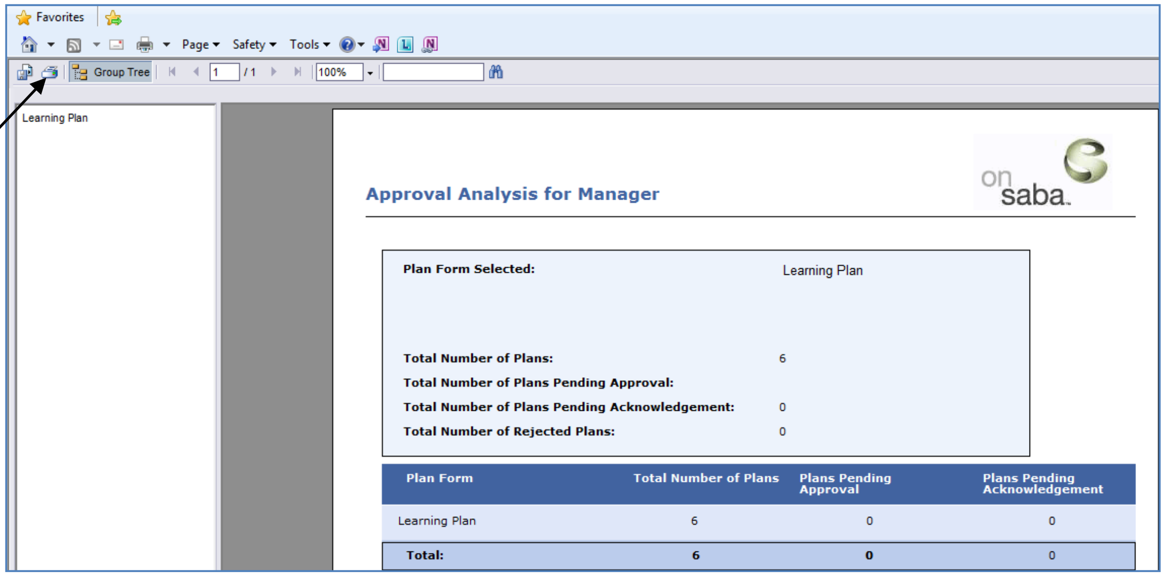
    NOTE: The time it takes the report to generate will be determined by a number of variables such as the report parameters entered, users concurrently using the system, and your internet connection speeds. If no results are found, try changing your parameters or call the help desk for assistance.

STEP-BY-STEP (PRINT A REPORT)

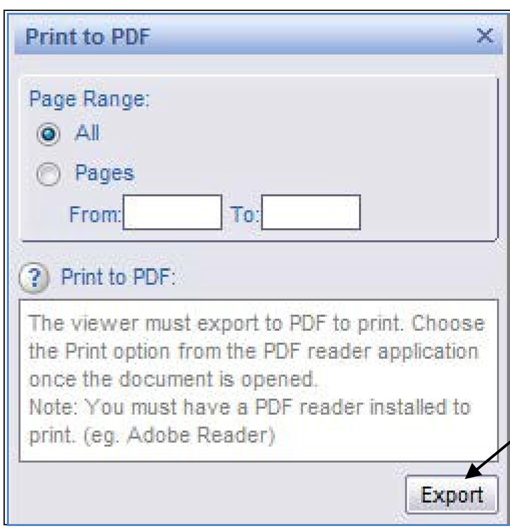
1. Generate a report. (For instructions on generating reports see the Step-By-Step directions above (Generate Report)

2. Click the **Print icon** in the upper left corner of the report.

Print icon



3. Indicate the **Page Range** you want, and click **export**.



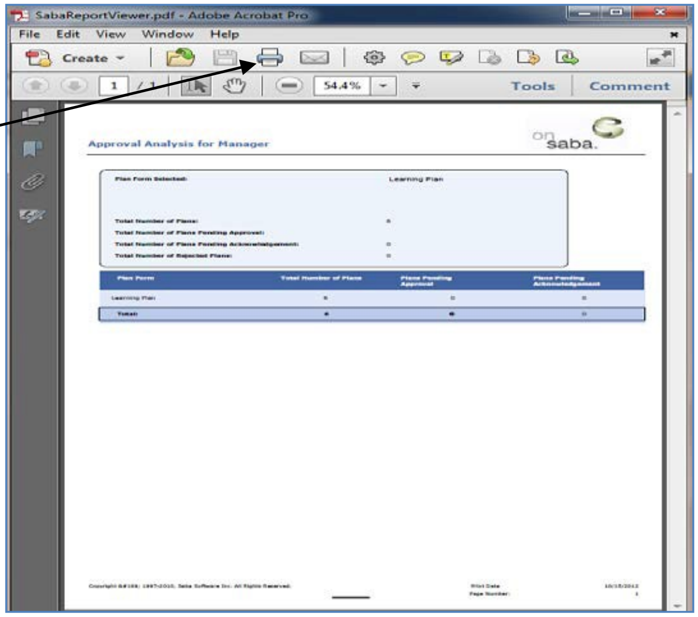
Export

4. You will be prompted to open or save the file. Click **Save**.

5. Locate where you want to save the file and give it a meaningful name; click **Save**.

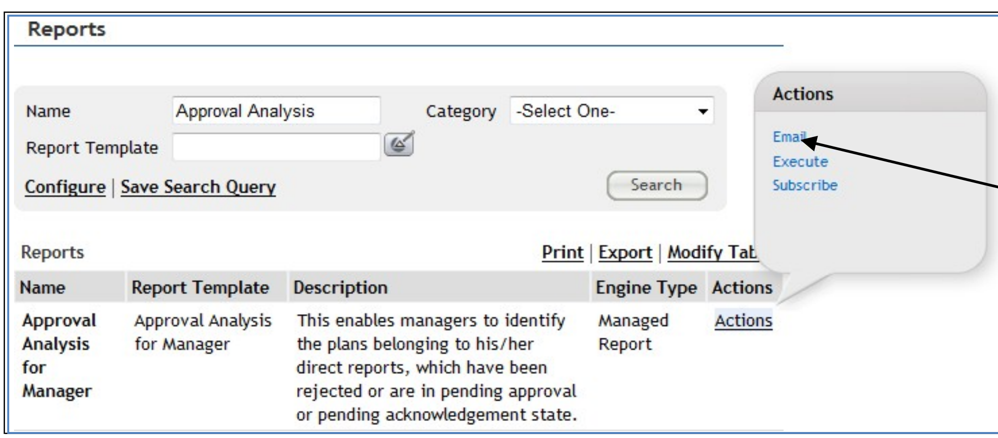
6. You will receive a prompt when the download is complete. Click **Open** to open the report file you just downloaded in Adobe Reader and click the Adobe Reader **Print** icon to send the report to your printer.

Print



STEP-BY-STEP (EMAIL A REPORT)

1. Search for a report. (For instructions on searching for reports see the Step-By-Step instructions above (Generate Report)
2. From the Reports Page, click the **Email** link from the Actions Pop Up Menu.

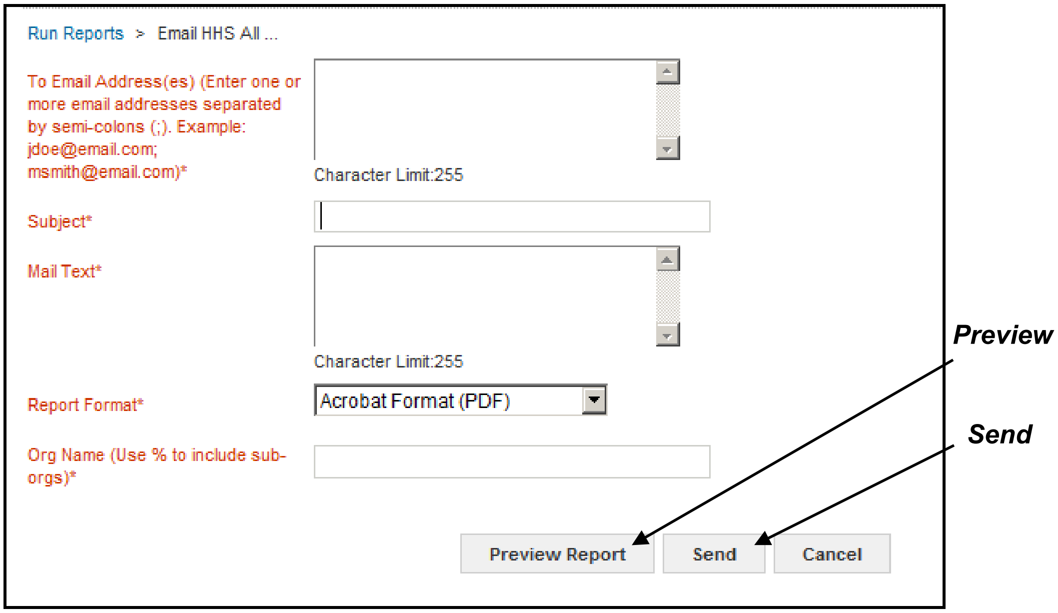


Email

3. Enter one or more recipient email addresses in the **To Email Address(es)** field.
4. Modify the **Subject** and **Mail Text** fields to appear as you want them in the email.
5. Choose a **Report Format** from the drop-down choices.

To Email Address(es)

6. Select a **Plan Form**.



IMPORTANT: All fields in red with an asterisk (*) require data in order to save changes.

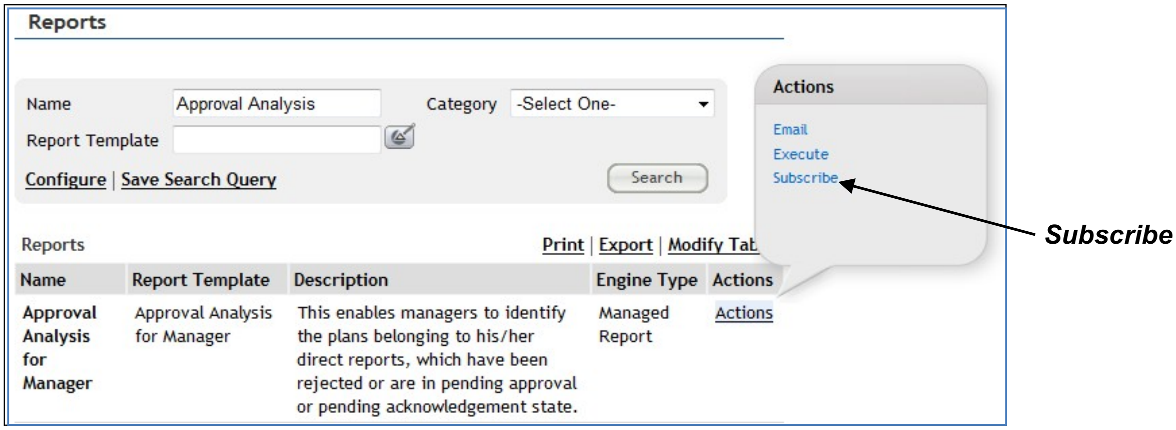
7. Click **Preview Report** to see the report as it will appear with the parameters you entered.

8. Review the report and click the **Send button** to send the report to the email recipients.

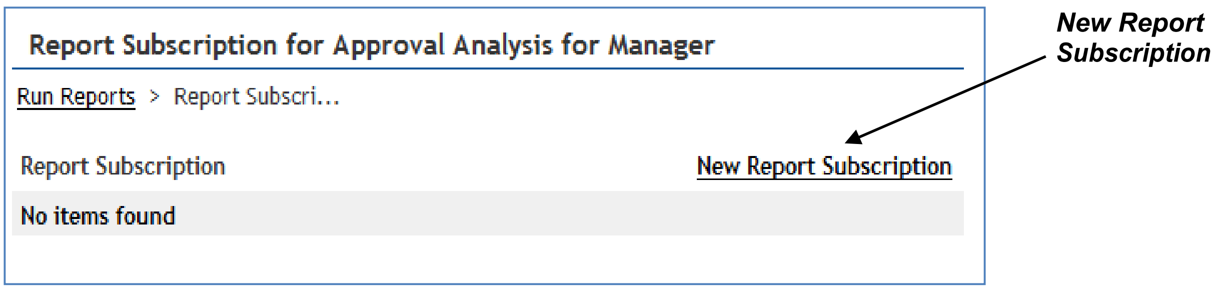
STEP-BY-STEP (SUBSCRIBE TO A REPORT)

1. Search for a report. (For instructions on searching for reports see the Step-By-Step instructions above (Generate Report)

2. From the Reports Page, click the **Subscribe** link from the Actions Pop Up Menu.



3. Click the **New Report Subscription** link on the right.



4. Enter a **Name** for the report subscription and a meaningful **Description**.

   NOTE: The fields required beyond this point **will vary depending upon the report you are running.** Complete all required fields listed in red.

5. Select the **Plan Form**.

6. Enter an email address into the **To** field.

7. Modify the **Subject** and **Mail Text** fields to appear as you want them in the email.

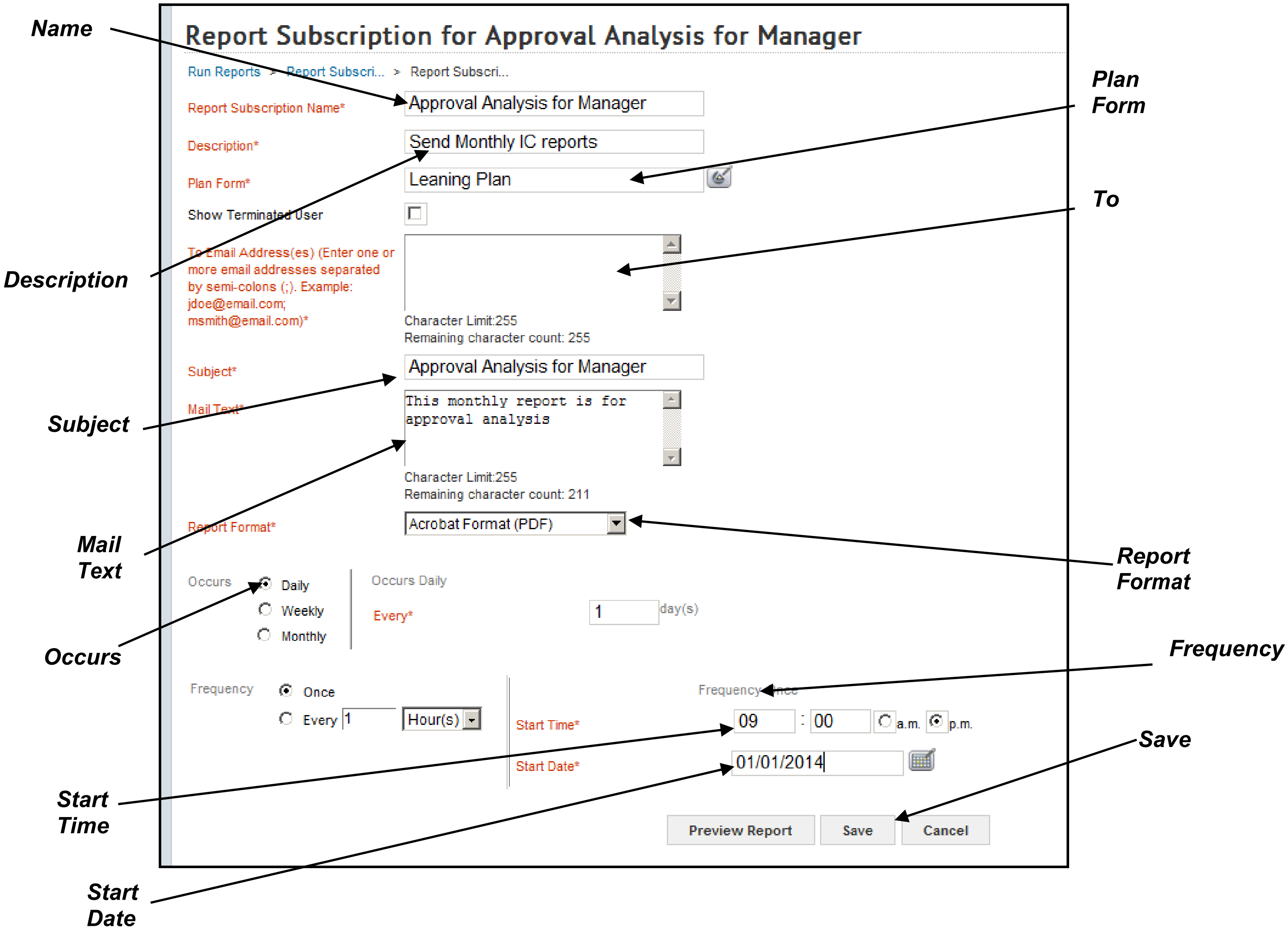
8. Choose a **Report Format** from the drop-down choices.

9. Select how often the report generation Occurs: **Daily**, **Weekly**, or **Monthly**, and indicate the number for each.

10. Set corresponding options for **Frequency**.

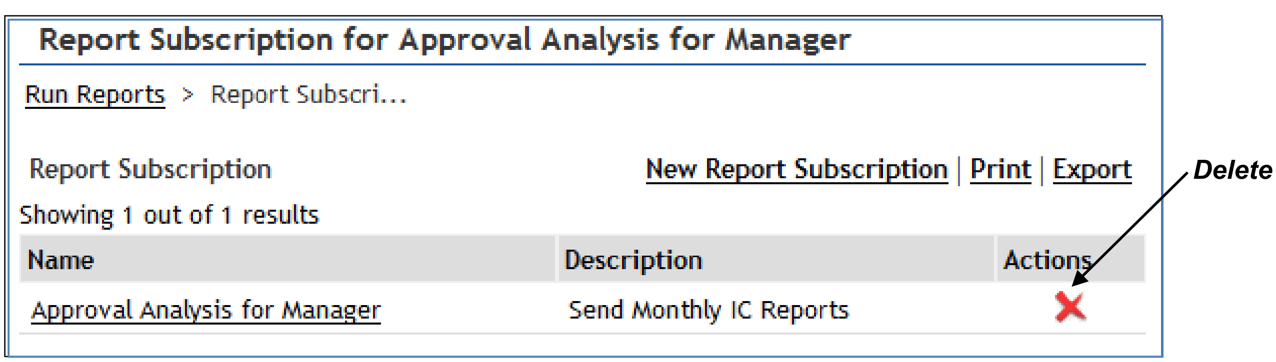
11. Click **Preview** to see the report as it will appear.

12. Click **Save** to activate the report subscription. The report will send at the times you designated, to email recipients you entered.



IMPORTANT: All fields in red with an asterisk (*) require data in order to save changes.

13. Click the subscription title to edit details, or click the red **X** to delete the subscription.



LEARNING PLANS

Under the **Plans** link on the Team Home page, the manager/supervisor can view, add, and edit the activities that are on their team's current learning plans.

MANAGING YOUR LEARNING PLAN

STEP-BY-STEP (VIEW ACTIVITIES FOR A TEAM MEMBER IN TEAM PLANS)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.
   NOTE: If there isn't a drop down list, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

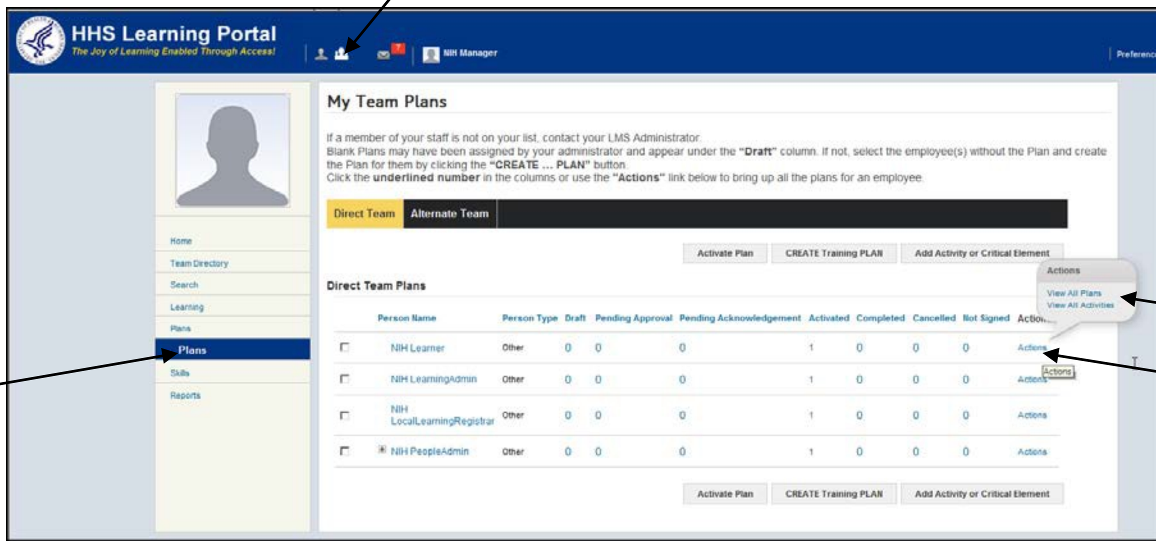
3. Click on **Plans**.

4. Click **Actions** to view the Actions pop-up window.

5. Click **View All Plans** in the Actions pop-up window.

LMS Manager/Supervisor

My Team Icon

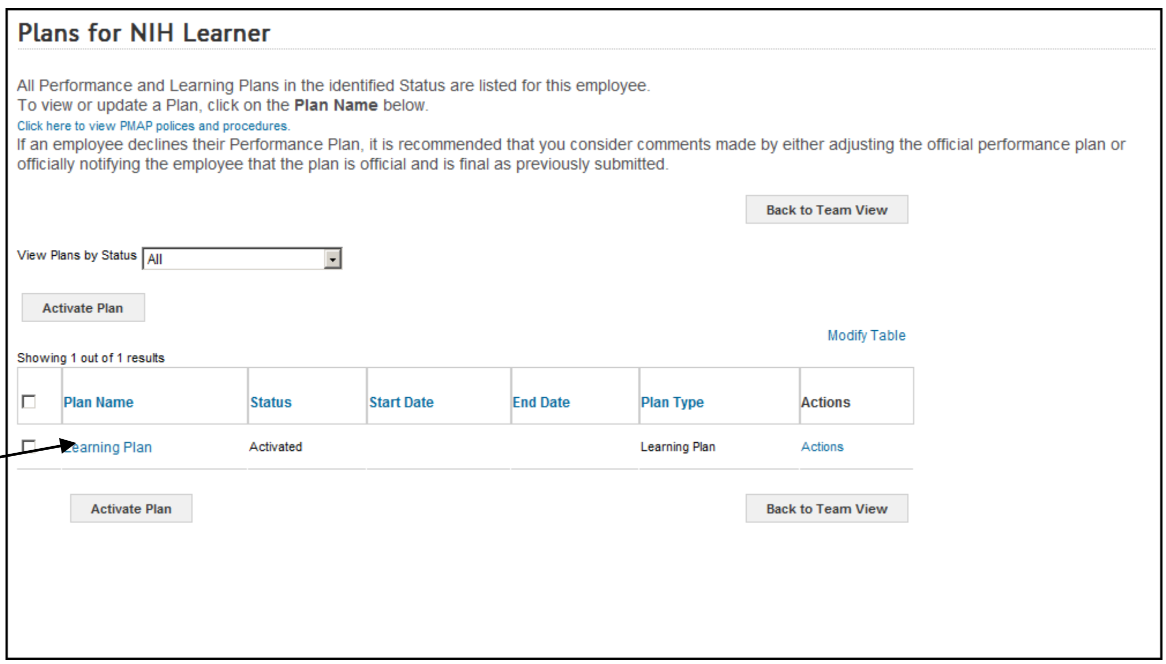


Plans

View All Plans

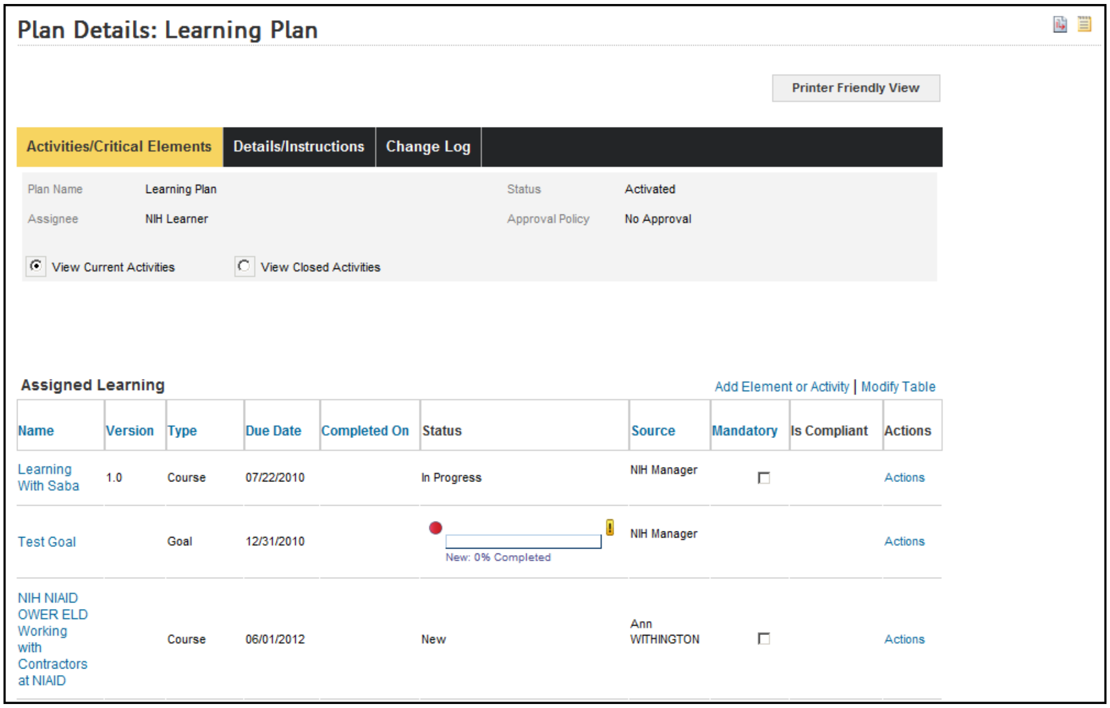
Actions

6. Click on **Learning Plan** under the Plan Name column.



Learning Plan

7. You will now view that team member's learning plan.



STEP-BY-STEP (ADD ACTIVITY TO A TEAM MEMBER IN TEAM PLANS)

1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

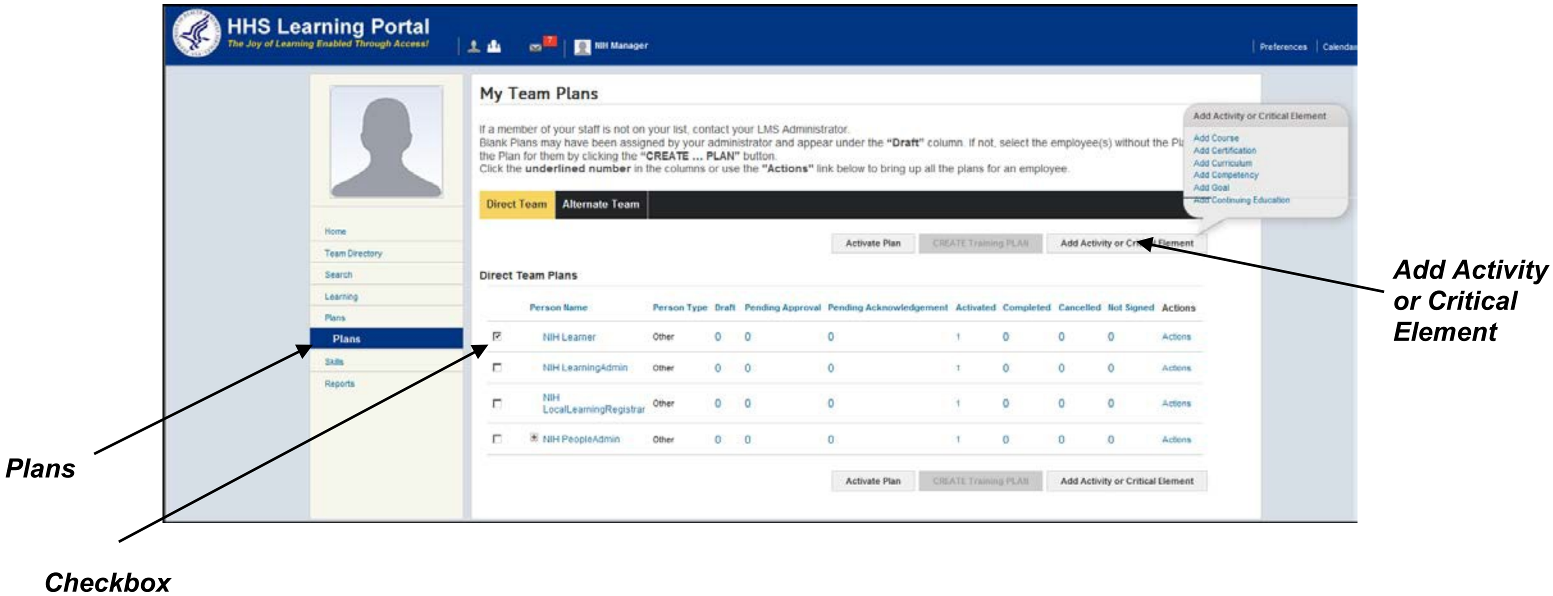
2. Click on the **My Team** icon on the LMS Menu bar.
   NOTE: If there isn't a drop down list, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf
3. Click on the Click on **Plans**.

4. Select the **checkbox** associated with the team member you want to add an activity for.

   NOTE: You may select more than one team member at a time.

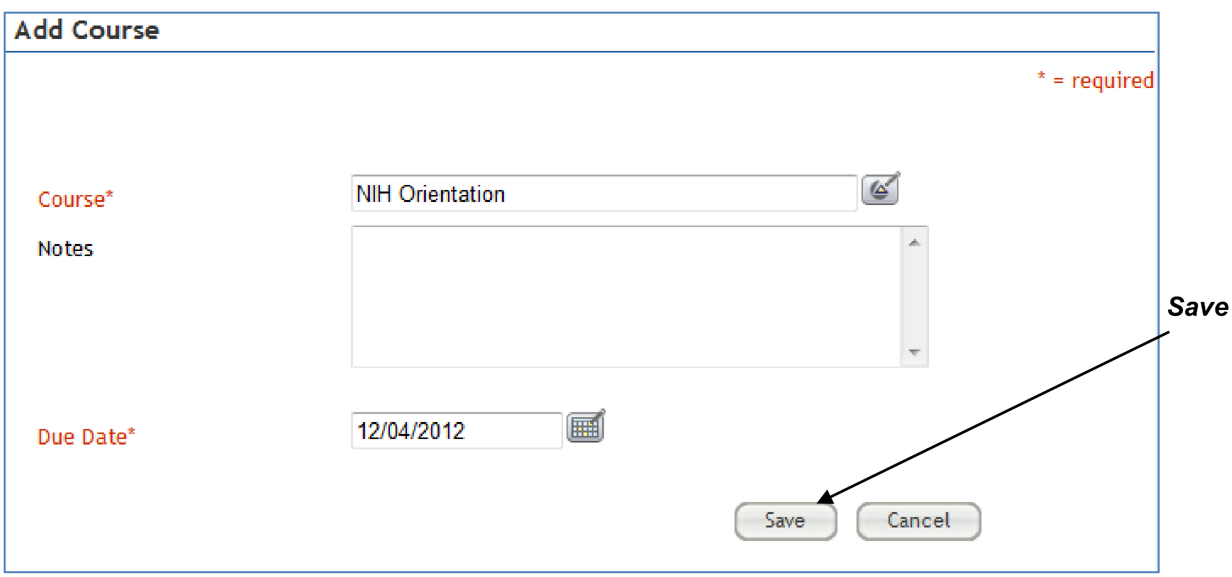
5. Click Add Activity or Critical Element.

6. Select the activity or element you wish to add from the popup menu.



7. Fill in the required information and then click **Save**.

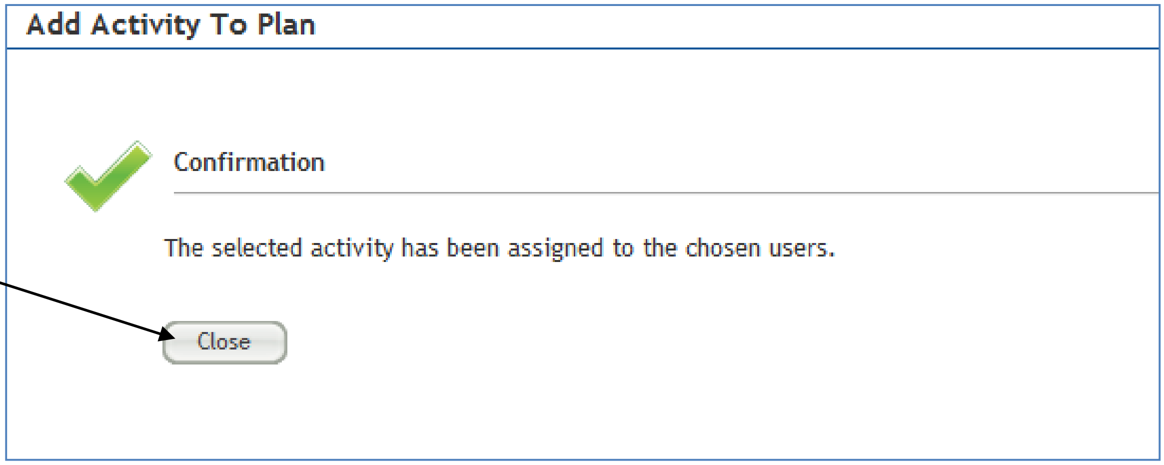
   IMPORTANT: All fields in red with an asterisk (*) require data in order to save changes.



8. The item will be added to the team member's learning plan.

9. Click **Close**.

Close



STEP-BY-STEP (DELETE AN ACTIVITY IN A TEAM MEMBER'S PLAN)

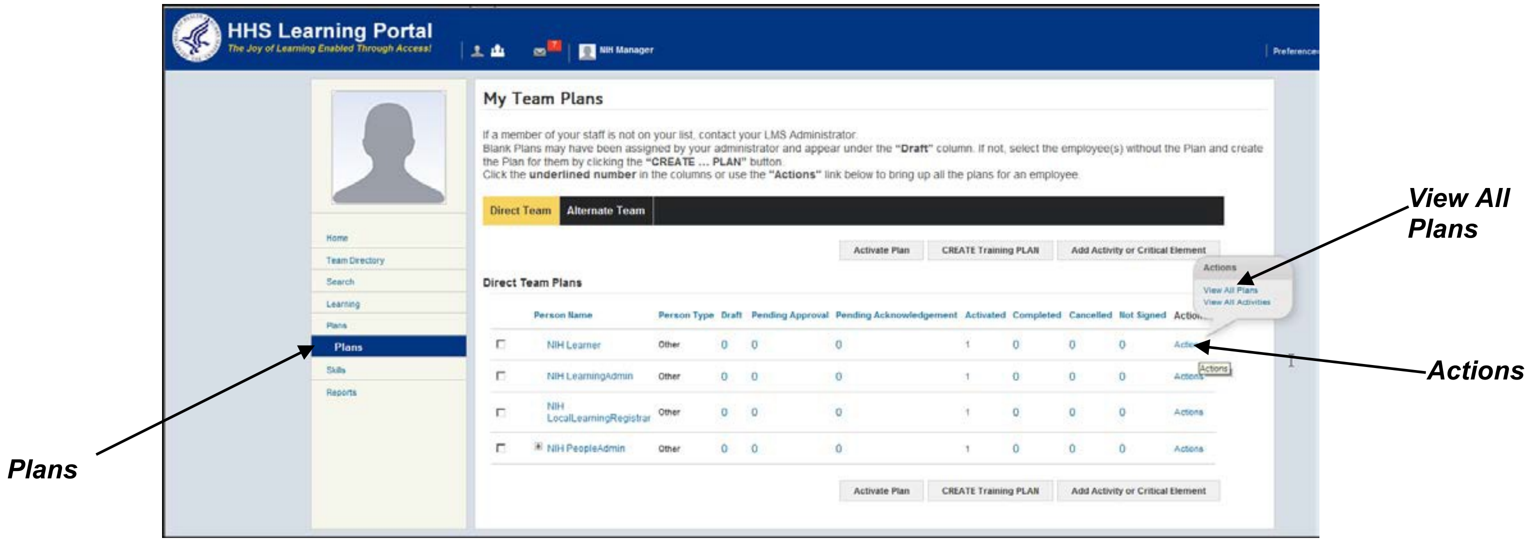
1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.
   NOTE: If there isn't a **My Team** icon, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

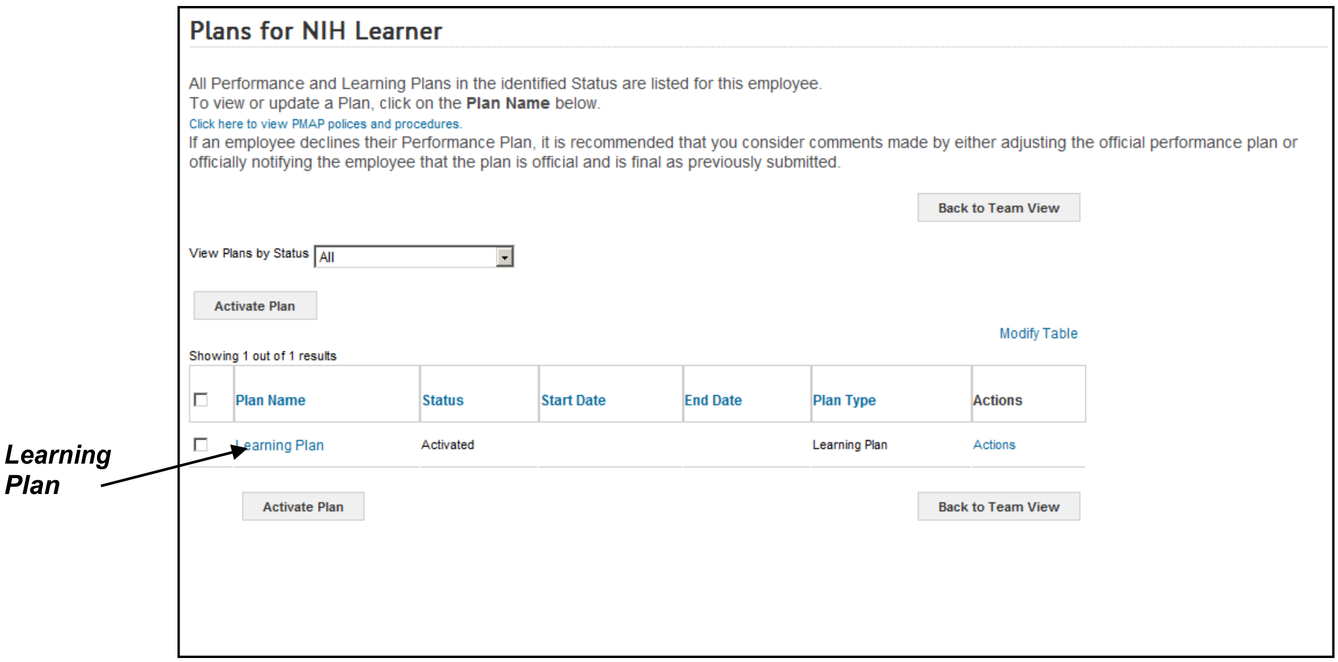
3. Click on the **Plans** tab.

4. Click **Actions** to view the Actions pop-up window.

5. Click **View All Plans** in the Actions pop-up window.

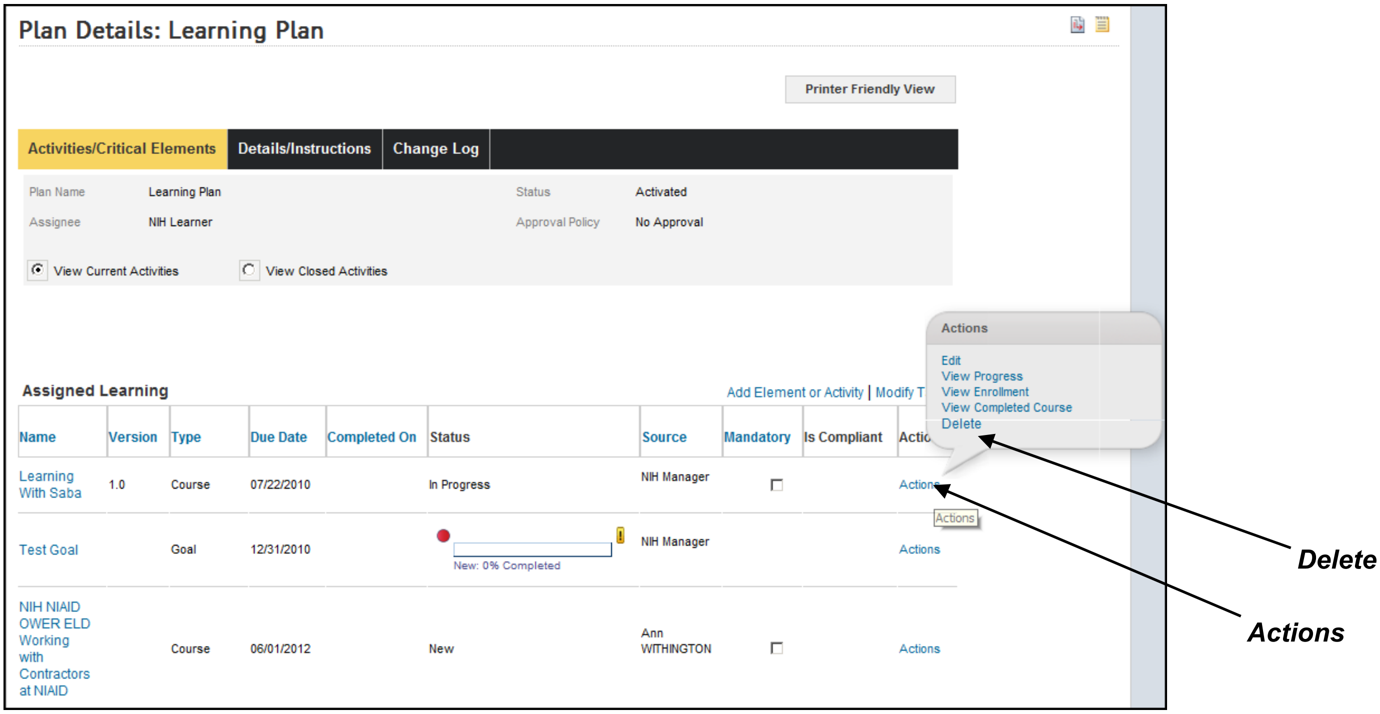


6. Click on **Learning Plan** under the Plan Name column.

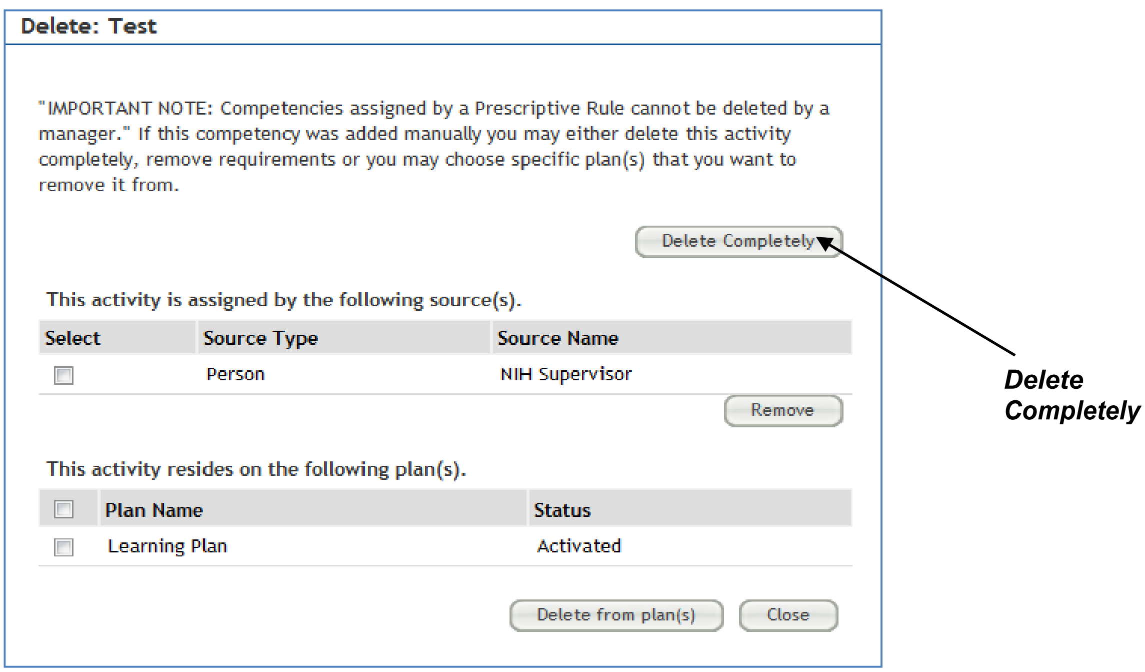


7. Click **Actions** on the line associated with the activity you wish to delete.

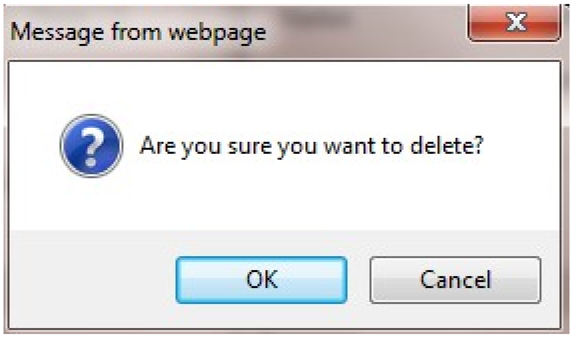
8. Click **Delete** from the Actions pop-up window.



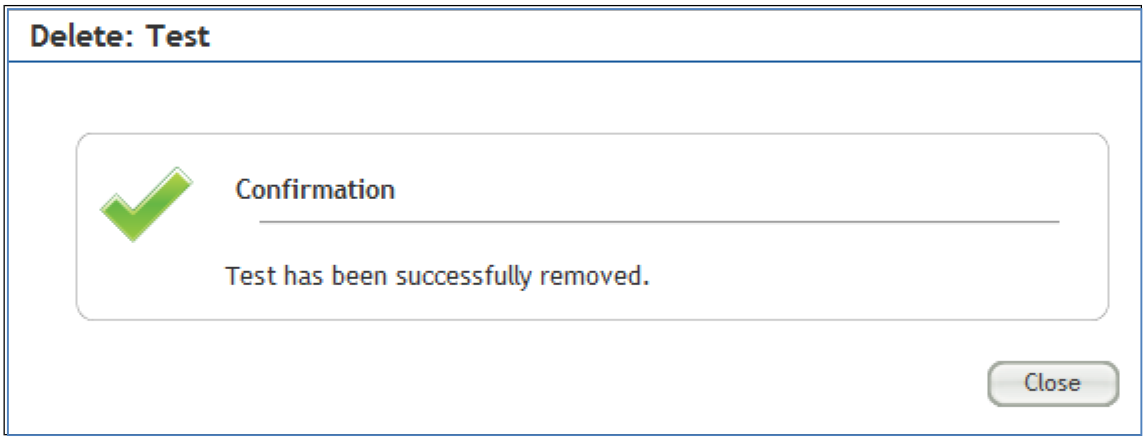
9. Click **Delete Completely** when you see this next screen.



10. Click **OK.**



11. The activity is now deleted. Click **Close**.



STEP-BY-STEP (REGISTER A TEAM MEMBER FOR TRAINING FROM A LEARNING PLAN)

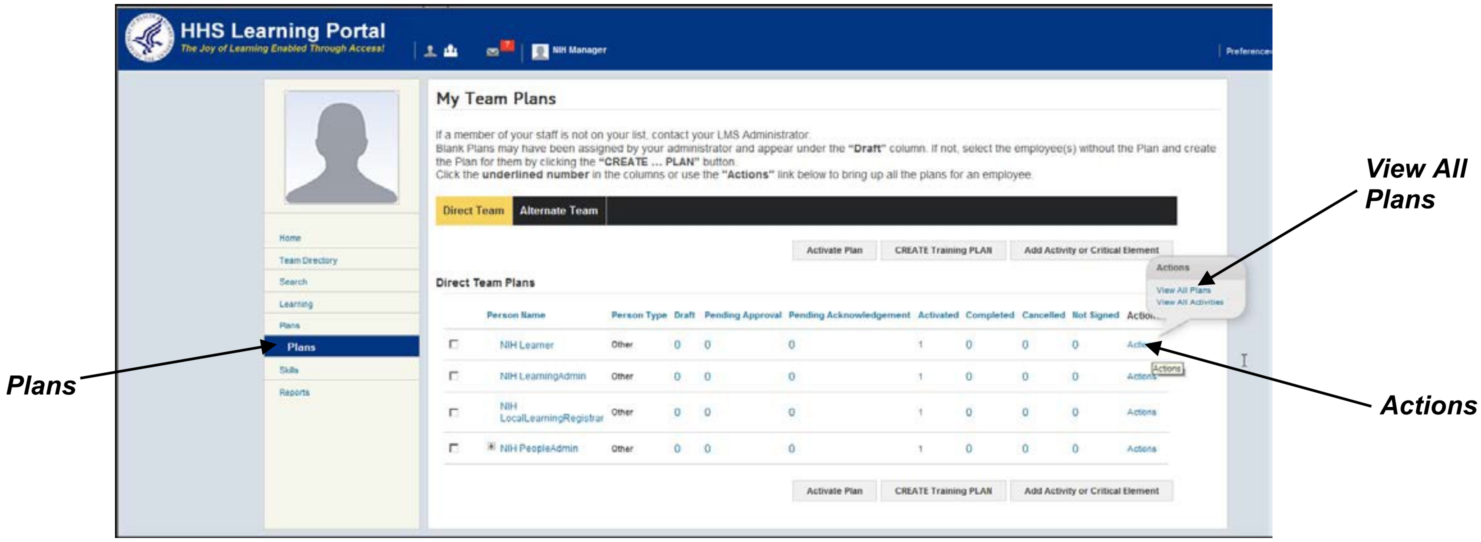
1. Log on to the LMS.
   NOTE: For instruction about logging on, see the QRG- LMS Log on Instructions at: https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf

2. Click on the **My Team** icon on the LMS Menu bar.
   NOTE: If there isn't a drop down list, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

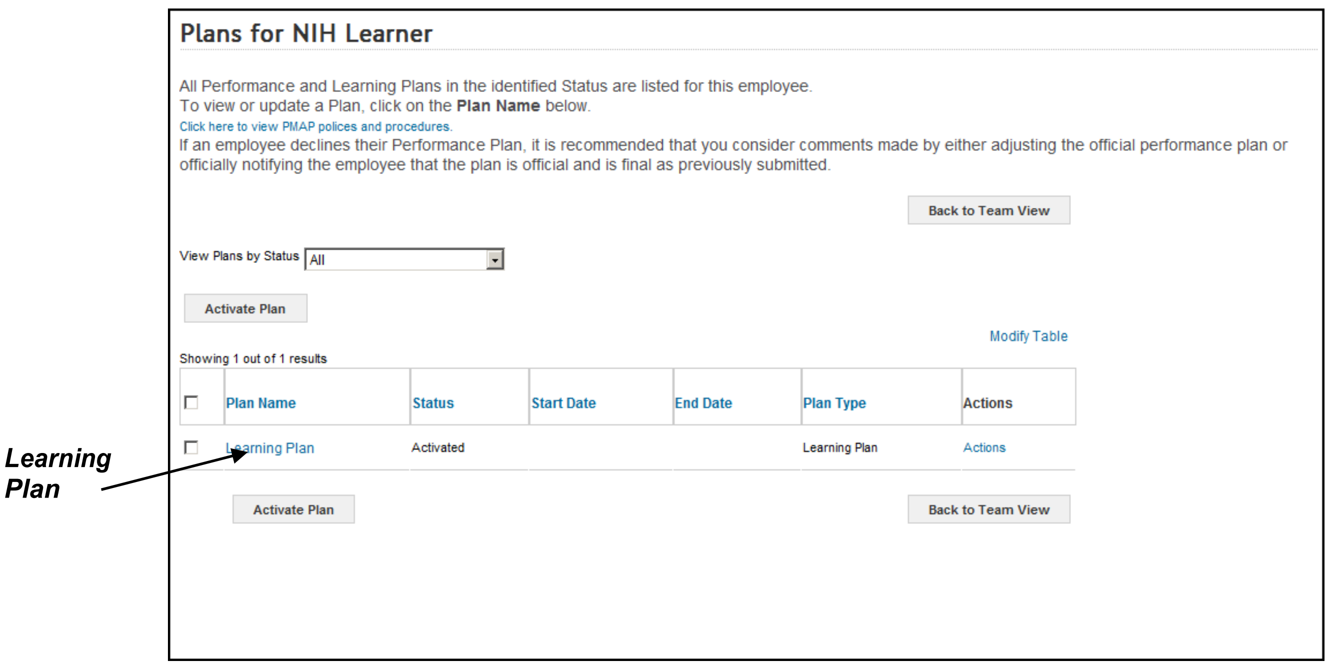
3. Click on the **Plans**.

4. Click **Actions** to view the Actions pop-up window.

5. Click **View All Plans** in the Actions pop-up window.

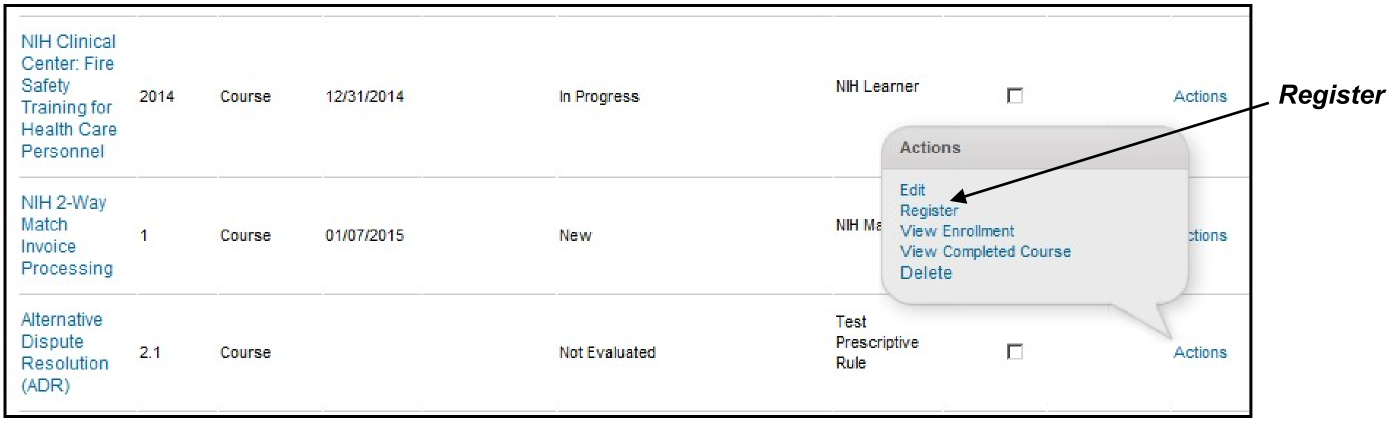


6. Click on **Learning Plan** under the Plan Name column.



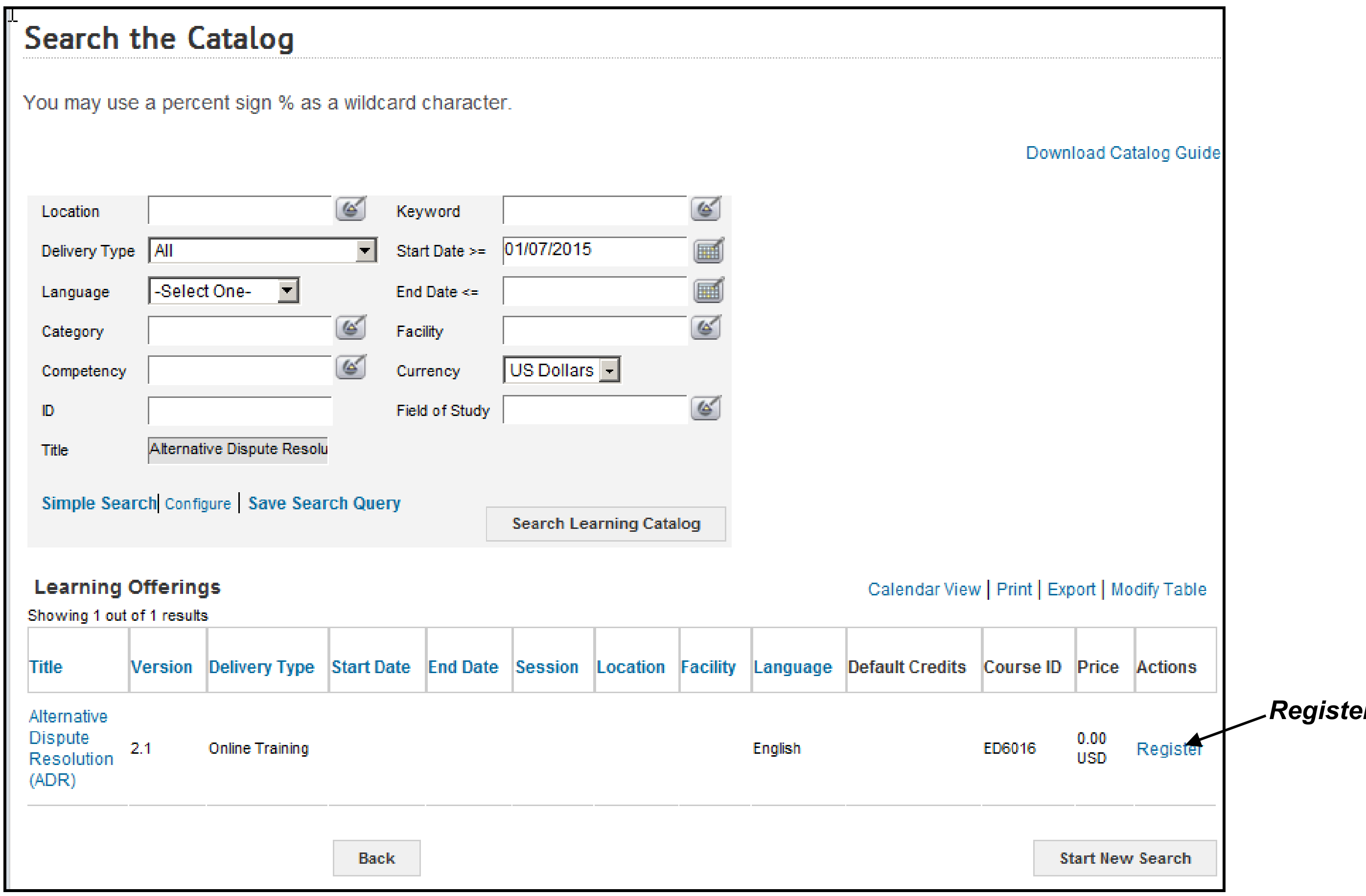
7. Click the **Actions** link in the row with the learning you want to register for.

8. Click **Register** in the Actions pop-up window.



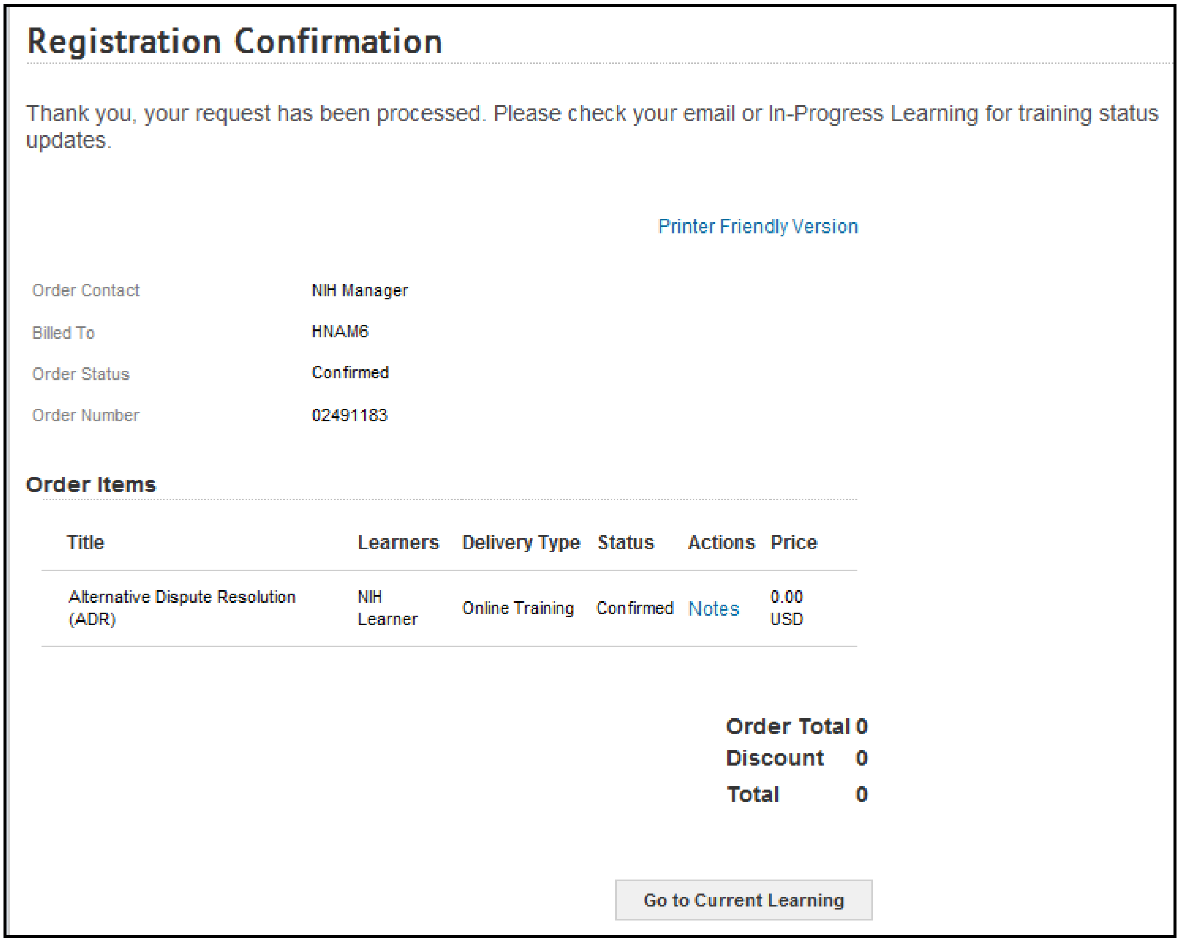
9. The Learning Catalog now appears.

10. Click on the **Register** link for the offering that you would like to register your team member for.



IMPORTANT! Offerings with tuition must have a CAN to make the registration official.

11. You will now see a registration confirmation page.



HELPFUL INFORMATION

HHS Learning Portal log on page

https://lms.learning.hhs.gov

NIH LMS Help Desk

Submit your LMS Help Desk Tickets to:
https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx

NIH Training Center web site

http://trainingcenter.nih.gov

NIH LMS Information and support information

http://trainingcenter.nih.gov/lms_courses.html

https://hr.nih.gov/hr-systems/lms

LMS Administrators in the ICs

https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf

NIH CIT Help Desk

http://itservicedesk.nih.gov/