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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: http://intrahr.od.nih.gov/helpdeskform.htm

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
http://hr.od.nih.gov/hrsystems/benefits/lms/lmssupport.htm

Tip Sheets for Manager/Supervisor tasks are located at:
http://hr.od.nih.gov/hrsystems/benefits/lms/managertipsheets.htm
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 AMS, please refer to the NIH-specific log on instructions found at: http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.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 Help 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.

Delivery Type – A delivery type is the method through which the course content will be delivered to learners. Some examples of delivery types are: Online Training, Traditional Classroom, Books, Video, and Webcast.

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

Facility – A facility is the physical building at a specific location. An example would be Building 31, which is part of the NIH Main Campus location.

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 Catalog – The Learning Catalog is a list of all the learning items in the LMS, such as courses, offers, certifications, and curricula.

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.

Offering – An offering is the specific date and time a course will be presented to learners. In most cases, offerings are limited to specific dates, times, locations, facilities, and rooms. Offerings are often referred to as classes. The exception would be self-paced courses, such as online training, where the offering is available to the learner at any time.

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

Prescriptive Rule – A prescriptive rule is a process the LMS can perform to dynamically assign performance goals or learning (offerings, courses, competencies, certifications, curricula, etc.) to people who meet specific criteria.

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 ratee is the 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.

**Room** – A room is a designated space, such as a conference room, classroom, or auditorium, found within a specific facility. An example would be Conference Room A in Building 31.

**Security Role** – A security role is a set of privileges assigned to a user who assumes that job role. A user can be a person, a manager, an alternate manager, a registrar, an instructor, or an administrator. The permissions granted to a user through a security role apply to the specified domain.

**Session Template** – A session template is a general format used to show the learner when a course is being offered. Session templates should contain the day and time the offering will be held. Examples of session templates are:

1. Mon 9 – 11
2. Mon - Wed 9 – 5
3. Mon, Wed, Fri 1 – 4:30

**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 at the far right you will always see a Welcome message with your account name.

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

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

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.

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.

Proxies can be established on the Proxy Settings tab. The LMS allows users to function as a proxy for another user when given the permission. A proxy will then have all of the permissions of the other user when they select the proxy mode.

Help: The help section introduces and describes how to use the learning interface. It provides a high-level discussion of the business processes and individual tasks that can be performed in the LMS.

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

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:** For instruction about logging on, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

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

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

3. Click on the **Preferences** tab. (Default)
**Home Dashboard Configuration** - you can select the portlets that are displayed on the home page by placing a check in the box.

**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]

**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:
LMS Manager/Supervisor

- 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 team 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 Tip Sheet- LMS Log on Instructions at: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf)

2. Select **Team Home** in the drop-down **Go To** menu.

   ![Team Home](image)

   **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 [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf)

3. You will be taken directly to the Team Home page.
THE TEAM HOME PAGE

The 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 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.

Manager Welcome

To get an overview of what is available to you as a manager/supervisor, search for the "Managing Team Learning" online course in the course catalog. Click here to access the course and register.

The Team Catalog Search allows the manager to search the LMS catalog and register team members for training offerings.

Team Catalog Search

Search: [Search field]  Go

Advanced Search  Browse by Category

The NIH Team Navigational Links portlet allows you view your team’s enrollments, transcripts, certifications and competencies.
The **Team Video Announcements** portlet allows you to view any announcements which have been posted via video.

The **Team Announcement** portlet allows you to view any announcements which have been posted by the Department.
THE MY TEAM TAB

The My Team tab 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 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 Tip Sheet- LMS Log on Instructions at:

2. Select the Team Home role in the drop-down Go To menu.

   **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:

3. Click on the My Team tab.
4. In the View/Edit Column of the Direct Team Table, place your cursor over the **Actions** link of the team member profile you wish to view.

5. **Click** Profile.

6. You will now see the user's profile.
The Team Learning tab provides quick access to the major components of your team’s learning in one location. From the Team Learning tab you have access to the following:

- **Team Enrollments** – view your team’s enrollments.
- **Team Transcripts** – view your team’s transcripts.
- **Learning Requests** – create learning requests for your team members.
- **Certifications** – view your team members’ certifications.
- **Team Curricula** – view your team’s curricula.
- **Catalog** – search the Learning Catalog and register your team members for course offerings.
- **Order History** – view the orders for your team members.
- **Continuing Education** – view the continuing education credits of your team members.

**Enrollments**

As a supervisor, you may manage your team members’ enrollments. When a team member is registered for a course, the LMS creates an enrollment. An enrollment 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 enrollment altogether.
Step-By-Step (Approving Pending Registrations for Team Members)

1. Log on to the LMS.
   
   **NOTE:** For instruction about logging on, see the Tip Sheet- LMS Log on Instructions at: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf)

2. Select the **Team Home** role in the drop-down **Go To** menu.

   **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: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf)

3. Click the **Team Learning** tab.

   ![Team Learning tab](https://example.com/image.png)

   **IMPORTANT!**: Do not click on the **Approve All** button at the bottom of the screen.

4. Place your cursor over the **Actions** link of the enrollment you wish to approve, reject or drop.
5. 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.

To view all team registrations, select **Team Registrations** from the menu on the left.

**Note:** The number of enrollments needing your approval is displayed in the **Pending Approval** column.

**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 Tip Sheet- LMS Log on Instructions at: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf)

2. Select the **Team Home** role in the drop-down **Go To** menu.

**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: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf)

3. Click the **Team Learning** tab.

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

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

**NOTE:** Click the **View Curricula for:** drop-down menu to toggle between your direct team and alternate team.

**NOTE:** Click the **View by:** drop-down menu to cycle through the views All Curricula, curricula by Job, curricula by Role.
NOTE: Click the **Curricula Summary** tab to view the summary view of your entire team’s curricula.

6. Click View Curricula link under Actions for the Team member you want to see.

7. 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.

8. Place your cursor over the **Action** 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 Tip Sheet- LMS Log on Instructions at: http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf

2. Select the Team Home role in the drop-down Go To drop-down menu.
   **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 http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf

3. Click the Team Learning tab.

4. Select Team Curricula 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 Curriculum link.
7. Enter the name of the curriculum you wish to add in the Name field.

8. Click Search.

9. Click the Select Button associated with the curriculum you wish to add.

10. 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 Tip Sheet- LMS Log on Instructions at: http://hr.od.nih.gov/hrsystems/staffing/lms/documents/EmployeeLogOn.pdf

2. Select the Team Home role in the drop-down Go To drop-down menu.

   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. http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf

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

4. Click Team Transcripts from the left menu.

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

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

   **NOTE**: You may view a larger/smaller range of transcript history by changing the Completion Dates and clicking Search.

   **NOTE**: You may view and print a certificate of completion by clicking Print Certificate of Completion.

   **NOTE**: You may view inactive transcript items by clicking the Inactive tab.
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 Tip Sheet- LMS Log on Instructions at: http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf

2. Select the **Team Home** role in the drop-down **Go To:** drop-down menu.

   **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. http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf

3. Click the Team **Learning tab**.

4. Select **Catalog** from the vertical navigation on the left side of the page.
5. Enter the name of the course into the **Search** field.

6. Click **Search Learning Catalog**.

7. Click **Register** associated with the offering.
8. Click **Add Learners**.

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

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

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

11. Click **Select**.
12. You will now be taken back to the **Add Seats and Learners** screen.

   **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. Click **Register Seats and Learners**.
14. 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 Tip Sheet- LMS Log on Instructions at: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf)

2. Select the **Team Home** role in the drop-down **Go To** drop-down menu.
   
   **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: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf)

3. Click the Team **Learning tab**.

4. Select **Order History** from the vertical navigation on the left side of the page.

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.

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 **Notes**.
LMS Manager/Supervisor

3. Click the **Add Note** link.

4. Select CAN from the **Category** drop-down menu.

5. The CAN has been added.

**Note:** The CAN field only accepts the 7 digits CAN. Fiscal year information is not necessary and will generate an error. The CAN number used in this tip sheet 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 Tip Sheet- LMS Log on Instructions at:

2. Select **Team Home** from the Go To: drop-down menu.

   **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.

3. Click the Team **Learning** tab.

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.

   **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 Tip Sheet- LMS Log on Instructions at:

2. Select **Team Home** from the Go To: drop-down menu.

   **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:

3. Click the Team **Learning tab**.
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.

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

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 Tip Sheet-LMS Log on Instructions at:

2. Select Team Home from the Go To: drop-down menu.

   **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:

3. Click the Team Skills tab.

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

5. Click Team Summary Rollup from the left menu. (Default)

   **NOTE:** You may click the Alternate Team tab to view your alternate team members.

   **NOTE:** 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 Tip Sheet- LMS Log on Instructions at:

2. Select Team Home from the Go To: drop-down menu.
   
   **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:

3. Click the Team Skills tab.

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

5. Click Team Competencies.

6. Click Actions for the desired team member.
7. Click View All Competencies

8. 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 Tip Sheet- LMS Log on Instructions at: http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf

2. Select the Team Home role in the drop-down Go To menu.

   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: http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf

3. Click on the Team Skills tab.

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

5. Click Team Competencies.

6. Click View All Competencies

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

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

9. Click Delete.

10. Select the source assigned to the competency.
11. Click **Remove**.

12. The competency will no longer be required.

---

**Step-By-Step (Add a Required Competency)**

1. Log on to the LMS.

   **NOTE:** For instruction about logging on, see the Tip Sheet- LMS Log on Instructions at:
   

2. Select the **Team Home** role in the drop-down Go To menu.

   **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:
   

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

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

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

7. Click Add Required Competency.

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

   **NOTE:** NIH competencies are prefixed with NIH.

9. Click Search.

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

10. Select the checkbox for the competency you wish to add.

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

13. Click **Save and Exit**.

14. 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 Tip Sheet- LMS Log on Instructions at:

2. Select the **Team Home** role in the drop-down **Go To menu**.

   **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 [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf)

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

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

5. Click **Team Competencies** from the left menu.

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

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

   **NOTE:** Only competencies that have been assessed will yield results.
8. Click the **Actions** link in the row of the competency for which you’d like to view the assessment.

9. Click **View Assessments**.

10. 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 Tip Sheet- LMS Log on Instructions at: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf)

2. Select the **Team Home** role in the drop-down Go To menu.

   **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 [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf)

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

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

5. Click **Team Competencies** on the left menu.

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

7. Click View Required Competencies.
8. Click the checkbox next to the competencies you want to create a new manager assessment for.

9. Click New Manager Assessment.
10. 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.

The following are the current reports for manager/supervisors. Others may be added in the future.

<table>
<thead>
<tr>
<th>Name</th>
<th>Report Template</th>
<th>Description</th>
<th>Engine Type</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Analysis for Manager</td>
<td>Approval Analysis for Manager</td>
<td>This enables managers to identify the plans belonging to his/her direct reports, which have been rejected or are in pending approval or pending acknowledgment state.</td>
<td>Managed Report</td>
<td></td>
</tr>
<tr>
<td>Certification Dashboard By Manager</td>
<td>Certification Dashboard By Manager</td>
<td>This report enables a manager to see all certification-related information.</td>
<td>Managed Report</td>
<td></td>
</tr>
<tr>
<td>Compliance/Exception Report By Manager</td>
<td>Compliance/Exception Report By Manager</td>
<td>Learner Status By Manager</td>
<td>Managed Report</td>
<td></td>
</tr>
<tr>
<td>Course Dashboard for Manager</td>
<td>Course Dashboard for Manager</td>
<td>This report shows a manager all completed courses-related information about learners directly reporting to the manager</td>
<td>Managed Report</td>
<td></td>
</tr>
<tr>
<td>Curriculum Dashboard By Manager</td>
<td>Curriculum Dashboard by Manager</td>
<td>This report enables a manager to see all curriculum-related information.</td>
<td>Managed Report</td>
<td></td>
</tr>
<tr>
<td>Enrollment Dashboard for Manager</td>
<td>Enrollment Dashboard for Manager</td>
<td>This report displays all learner enrollments for a given Manager’s direct reports</td>
<td>Managed Report</td>
<td></td>
</tr>
<tr>
<td>HHS All Approvers by Org Report</td>
<td>HHS All Approvers by Org Report</td>
<td>This report returns all the learners in an org and lists their Manager, Additional Approver on Orders and Alternate Manager(s).</td>
<td>Managed Report</td>
<td></td>
</tr>
</tbody>
</table>
Step-By-Step (Generate a Report)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the Tip Sheet- LMS Log on Instructions at:
LMS Manager/Supervisor

2. Select the Team Home role in the drop-down Go To menu.

   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 http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf

3. Click the Reports tab.

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.

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

3. Enter one or more recipient email addresses in the To 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.

6. Select a Plan Form.
**LMS Manager/Supervisor**

**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 **Send** 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.
LMS Manager/Supervisor

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 Team Success Plans tab on the Team Home page, the manager/supervisor can view, add, and edit the activities that are on their teams current learning plans.

Step-By-Step (View Activities for a Team Member in Team Success Plans)

1. Log on to the LMS.

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

2. Select the Team Home role in the drop-down Go To menu.

   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
   http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf

3. Click on the Team Success 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. You will now view that team member’s learning plan.
Step-By-Step (Add Activity to a Team Member in Team Success Plans)

1. Log on to the LMS.

   **NOTE:** For instruction about logging on, see the Tip Sheet- LMS Log on Instructions at:

2. Select the **Team Home** role in the drop-down **Go To** menu.

   **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

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

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.

```
Add Activity To Plan

Confirmation

The selected activity has been assigned to the chosen users.

Close
```

**Step-By-Step (Delete an Activity in Team Success Plans)**

1. Log on to the LMS.

   **NOTE:** For instruction about logging on, see the Tip Sheet- LMS Log on Instructions at:

2. Select the **Team Home** role in the drop-down **Go To** menu.

   **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

3. Click on the **Team Success 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.

<table>
<thead>
<tr>
<th>Step-By-Step (Register a Team Member for Training From Learning Plan)</th>
</tr>
</thead>
</table>
| 1. Log on to the LMS.  

**NOTE:** For instruction about logging on, see the Tip Sheet- LMS Log on Instructions at: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf)  

2. Select the **Team Home** role in the drop-down **Go To** menu.  

**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 [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf)  

3. Click on the **Team Success 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 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.
11. A Please read screen may appear.

![Please read screen](image1)

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

12. You will now see a registration confirmation page.

![Registration confirmation page](image2)
HELPFUL INFORMATION

HHS Learning Portal log on page

https://lms.learning.hhs.gov

NIH LMS Help Desk

Submit your LMS Help Desk Tickets to:

http://intrahr.od.nih.gov/helpdeskform.htm

NIH Training Center web site

http://trainingcenter.nih.gov

NIH LMS Information and support information

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

http://hr.od.nih.gov/hrsystems/benefits/lms/lmssupport.htm

LMS Administrators in the ICs


NIH CIT Help Desk

http://itservicedesk.nih.gov/