National Institutes of Health


<table>
<thead>
<tr>
<th>Version Number</th>
<th>Revision Date</th>
<th>Approved By</th>
<th>Approval Date</th>
<th>Description of Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>12/10/2009</td>
<td>NIH LMS Program Manager</td>
<td>12/10/2009</td>
<td>Initial publication</td>
</tr>
<tr>
<td>2.0</td>
<td>01/03/2011</td>
<td></td>
<td></td>
<td>5.5 Revisions</td>
</tr>
<tr>
<td>3.0</td>
<td>03/11/2013</td>
<td>NIH Team Lead</td>
<td>03/11/2013</td>
<td>5.5 Updates</td>
</tr>
<tr>
<td>3.1</td>
<td>07/03/2013</td>
<td>NIH Team Lead</td>
<td>07/03/2013</td>
<td>URL updates</td>
</tr>
</tbody>
</table>

Please submit your LMS Help Desk Tickets to:

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

LMS Introduction ............................................................................................................................ 7
  Preface: About This Guide ........................................................................................................ 7
  Intended Audience .................................................................................................................... 7
  How to Get Help ........................................................................................................................ 7
  Additional Notes ......................................................................................................................... 7
LMS Fundamentals ......................................................................................................................... 9
  Learner Profile .......................................................................................................................... 9
  Domains .................................................................................................................................. 10
  Security Roles ............................................................................................................................ 10
LMS Terms and Definitions .......................................................................................................... 11

Overview of the LMS User Interface ......................................................................................... 14
  The Login Page ........................................................................................................................ 14
    Step-By-Step (Logging Into AMS using a piv card or nih credentials to access the learning portal) ...................................................................................................................... 14
  The Menu Bar ............................................................................................................................ 16
    Step-By-Step (Access the LMS Calendar) ............................................................................. 16
    Step-By-Step (Change Your Home Dashboard Configuration) ........................................ 18
    Step-By-Step (Access Online Help) .................................................................................... 20
My Learning Home Dashboard (The Home Tab) ..................................................................... 21
  Home Page Tabs ....................................................................................................................... 21
  Home Page Portlets .................................................................................................................... 21
Managing Your Learning (The Learning Tab) .......................................................................... 23
  in-progress learning .................................................................................................................. 23
    Step-by-Step (Using the in-progress learning activities Portlet) ........................................ 24
    Step-By-Step (View My in-progress learning) .................................................................... 25
    Step-By-Step (Launch an Online Course from Your Enrollments) .................................. 25
    Step-By-Step (Drop an Enrollment) .................................................................................... 26
    step by step (Learning Requests) ......................................................................................... 27
    step by step (Request approval) ......................................................................................... 29
Transcript ..................................................................................................................................... 31
  Step-By-Step (View Transcript) ............................................................................................ 31
  Step-By-Step (Review a Completed Online Course from Transcript) ............................ 32
  Step-By-Step (Print a Certificate of Completion) ................................................................. 33
  Step-By-Step (Export your Transcript) .................................................................................. 36
LMS INTRODUCTION

PREFACE: ABOUT THIS GUIDE

INTENDED AUDIENCE

This guide is intended for all NIH staff using the HHS Learning Portal/LMS. By default, everyone with an LMS account is a ‘Learner.’ At NIH, everyone with an NIH Enterprise Directory (NED) and an Active Directory accounts should also have an LMS account. As a Learner, you can find and take training in the LMS and use several professional development tools and resources the system has to offer.

HOW TO GET HELP

If you encounter technical difficulties logging on to the LMS or performing any tasks in this user guide, please submit a ticket to the HR Systems Support Help Desk at: http://intrahr.od.nih.gov/helpdeskform.htm.

ADDITIONAL NOTES

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://ithelpdesk.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://ithelpdesk.nih.gov/.

SKILLSOFT COURSES

If you plan to take one of the many free online Skillsoft courses in the LMS, you can test your computer for compatibility at this link- http://browser.skillport.com/bh/default.asp. You will need to enter a valid email address to run the checker and receive the results via email. Please provide the report to your local IT support if any problems are noted.

BROWSER INFORMATION

LMS works best with Internet Explorer but if you are using a MAC you should view online courses with the Safari browser, not Firefox.
Learner

LMS INFORMATION
Additional information and resources for the HHS Learning Portal/LMS can be found at:

NIH Training Center website: [http://trainingcenter.nih.gov/lms_courses.html](http://trainingcenter.nih.gov/lms_courses.html) or

HR Systems Support website: [http://hr.od.nih.gov/hrsystems/benefits/lms/lmssupport.htm](http://hr.od.nih.gov/hrsystems/benefits/lms/lmssupport.htm)

The HHS Learning Portal/LMS is among a list of HHS systems that are accessed via the Access Management System (AMS). The log on screen can be found at [https://iam.hhs.gov/opensso/SimpleLogin.jsp](https://iam.hhs.gov/opensso/SimpleLogin.jsp)
LMS FUNDAMENTALS

HHS Learning Portal/LMS: The terms HHS Learning Portal and LMS are used interchangeably and refer to the same system. The Learning Management System (LMS) is a Department-wide system for managing, accessing, and tracking training. As a Department-wide system, the overall LMS is managed at the HHS level – hence the name HHS Learning Portal. Following are concepts and terms that should be understood before beginning to perform tasks in the LMS.

LEARNER PROFILE

The Learner Profile contains information about the learner, such as employee status, start date, name, and organization. The profile does not contain personally identifiable information such as the employee’s social security number or date of birth.

The Learner Profile receives data from the following sources on a nightly basis:

- NIH Enterprise Directory (NED)
- Capital HR
- Commissioned Corps Personnel Database

Anyone given an NIH Enterprise Directory (NED) and an Active Directory account will automatically be given an LMS account. The information in the Learner Profile comes from one or more of the Human Resources system interfaces listed above.

The Learner Profile fields you should be most concerned with are:

**E-mail:** Accurate email addresses in the LMS will ensure learners receive system generated notifications. The email in your LMS profile is populated by a data feed from NED. If it is incorrect, please check your NED profile and update it as needed. The update will come to the LMS through the data feed by the following day.

**Manager:** Having the correct manager / supervisor listed will allow supervisors to view their direct reports and access training and development information. The manager field for Federal employees in the LMS is populated with the last ITAS timecard approver by a data feed. It will remain that way until the next pay period, and will change if a different person approves the timecard. The manager field for non-Federal employees can be updated by an LMS administrator, and is not affected by a data feed.

**Organization:** People are grouped in the LMS according to Organization/SAC Code. (See Appendix A.) This code is used to build audience types (which restrict access to courses), narrow the scope of reports, etc. This code must be correct or learners will neither show up in reports correctly nor have access to the correct training opportunities. If this is incorrect, please check your NED profile and notify your Administrative Officer (AO).
DOMAINS

Domains (a.k.a. Security Domains) in the LMS are used to segment users into hierarchical groups of people who should all have the same basic security permissions.

NIH has its own domain to ensure that all NIH employees and contractors have access to NIH-specific training resources. Having an NIH domain also prevents users in other domains (other agencies within HHS) from viewing and accessing NIH-specific training resources.

SECURITY ROLES

Every user in the LMS has the security role of Learner. If you are designated as the Manager in someone’s Learner Profile, you will automatically have the role of Manager/Supervisor as well.

NIH staff who have attended LMS administrator training may have various administrator roles in the system. For a list of people in your IC who have active administrator privileges in the LMS, please go to:

http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofCLMSAdministrators.pdf
LMS TERMS AND DEFINITIONS

**Audience Types** - Audience Types are used to group learners in the system. Similarly, Audience Sub-Types allow for the further grouping of learners within an Audience Type. These groups can then be used to control access to learning offerings in the LMS.

**Certification** – A predefined set of courses 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, or behavior that can be measured, calculated, acquired, specified, or tested. Examples of competencies include “Java Programming”, “Written Communications”, “Product Knowledge”, and “People Skills”. Assigned competencies are “required,” and assessed competencies are “held.”

**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 predefined set of courses that have been grouped together. A learner must complete all courses to complete the curriculum.

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

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

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

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

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

**Job Roles** – Roles identify specific skills required to perform a job function. Roles can be shared across multiple jobs. Role definitions may include:

- Competencies — competencies required to perform the function (including criticality of the competency and minimum required proficiency)
- Certifications — certifications required to perform the function.
- Curricula — curricula required to perform the function.
- Attachments — additional information about the job function.
Learner

**Job** – A job is a collection of roles. It inherits the certifications, competencies, and curricula of the associated roles. Job definitions may include:

- Roles — define the functional responsibilities for the job.
- Next career steps — other jobs that represent likely promotion paths for people who hold the job.
- Attachments — additional information about the job functions.

NOTE: In the HHS Learning Portal, jobs are listed according to the OPM job series number.

**Learning Catalog** – The Learning Catalog is a list of all the learning items in the LMS, such as courses, offerings, certifications, curricula, and packages (groups of courses). To view the learning items of your interest and to register for an item, access the Learning Catalog.

**Learning Plan** – Learning plans allow learners to keep track of learning offerings they need to take and other tasks they need to perform as part of their general development. Every learner has a single learning plan. Learners can set or view the progress of each item in their learning plan. In addition, users with certain privileges (like managers) can also view progress on the learning plan items.

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

**Multi-Rater Assessment (MRA)** – A multi-rater assessment (MRA) is a method by which a learner’s competencies are assessed by supervisors, peers, subordinates, and customers.

**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. The exception would be self-paced courses, such as online training, where the offering is available to the learner at any time. Offerings are often referred to as classes.

**Order** – An order is created when a learner, manager, administrator, or registrar assigns an offering to self or to other learners.

**Portlet** – An area, delimited by a border, within the HHS Learning Portal main screen (a.k.a., dashboard) that provides quick access to specific areas of the system, such as a learner's current enrollments, the catalog search, or communities.

**Proficiency Level** – Proficiency levels represent 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** – The employee whose competencies are being rated.

**Rater** – An individual who is completing a competency assessment of someone else.
**Learner**

**Registration** – A registration is created when a learner signs up for an offering.

**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.

**Survey** – 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
OVERVIEW OF THE LMS USER INTERFACE

THE LOGIN PAGE

The HHS Learning portal is accessed thru the Access Management System (AMS). To log in to the AMS, visit: https://iam.hhs.gov/opensso/SimpleLogin.jsp

NIH users can log in to the AMS using only two of the three login options available in AMS: HHS PIV Card or OPDIV Network Credentials (see below)

STEP-BY-STEP (LOGGING INTO AMS USING A PIV CARD OR NIH CREDENTIALS TO ACCESS THE LEARNING PORTAL)

1. To login to AMS using your HHS issued PIV card, insert your PIV card and click the ‘Login’ button under the PIV image on the AMS login page.

2. To login using your NIH Network Credentials, go to the OPDIV Network Credentials, then select NIH from the “Select OPDIV” drop down list. Click the link and you will be redirected to authenticate with the NIH Login System.

Upon successful login into the AMS, you will see the AMS welcome page and a list of your linked applications (Systems).
You should see a hyperlink for the HHS Learning Portal. Click on the hyperlink to access the system. If you do not see HHS Learning Portal link listed, please contact the HR Systems Support Help desk by submitting a helpdesk ticket at: http://intrahr.od.nih.gov/helpdeskform.htm.
THE MENU BAR

Once you log in, you will see a blue menu bar at the top of every page within the LMS. At the far right, you will always see a Welcome message with your name. The menu bar provides access to a Calendar, your LMS Preferences, Help documentation, and a Log Out option. The major functionality of each option is listed below.

Calendar: This option will open a calendar that displays any scheduled (e.g., classroom) classes that you are registered for through 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 LMS calendar.

STEP-BY-STEP (ACCESS THE LMS CALENDAR)

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

The Calendar can be viewed by Month, Week, or Day. You can view offerings you are signed up to take as well as create new appointments

1. Log in to the LMS.
2. Click on Calendar on the top menu bar. Please note the tabs for Month, Week, and Day.

   NOTE: Make sure your web browser does not block pop-up windows.
3. Click **Create Appointment**.

4. To create an appointment for your calendar, fill in the required fields and click **Save**.

**IMPORTANT:** All fields in red with an asterisk (*) require data in order to save changes.
Preferences: This option allows you to change the look and functionality of your dashboard screen (Preferences tab). You will also see a tab for Proxy Settings, a feature particularly useful for managers/supervisors or administrators.

STEP-BY-STEP (CHANGE YOUR HOME DASHBOARD CONFIGURATION)

The Preferences area allows you to change the look and functionality of your Home Dashboard or change your password.

1. Click on Preferences on the top menu bar.
2. Click on the Preferences tab.
3. Under the Home Dashboard Configuration you can select the portlets that are displayed on your home dashboard by checking/unchecking boxes as needed.
4. Do not change settings in the Website Preferences area.
5. Under the Catalog Search Preferences, you can select default search options for the course catalog search feature.

IMPORTANT: If you set Catalog Search Preferences, remember that it could affect your search results later.
6. The following areas are not currently being used at NIH: **Instant Messenger Information**, and **Table Row Display Preferences**. You should not alter the default settings without valid reason.
Learner

7. Click **Save** to save the changes you have made. Click **Save and Close** to save your changes and close the window.

**Help:** This option provides information on how to use the LMS and provides a high-level discussion of the business processes and individual tasks that can be performed in the system.

**STEP-BY-STEP (ACCESS ONLINE HELP)**

1. Log in to the LMS.
   
   **NOTE:** For instruction about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. From the top of any page within the LMS, click **Help** on the top menu bar.
   
   **NOTE:** Make sure your web browser does not block pop-up windows.

3. Use the **Contents** tab to browse the complete list of help topics available to you. Help content will appear on the right side of the **Help** window.

4. Use the **Search** tab to search for a specific help topic.

5. Use the **Favorites** tab to add your currently selected topic into your Favorites List. Make sure you click the add button, this will create a link to your current selected help topic. This makes accessing the information quick and easy, should you need to make use of the Help section again.

**Log Out:** This link logs you out of the system and takes you back to the login page.
MY LEARNING HOME DASHBOARD (THE HOME TAB)

The first screen you see when you log on to the LMS is called the Home Dashboard.

**Note:** If you are a manager/supervisor or administrator in the LMS, you will have other roles available to you as well. You can always return to the Home Dashboard by selecting **Home** in the Go To drop-down menu. (If your only role in the LMS is Learner, you will not see a Go To drop-down menu.)

HOME PAGE TABS

Near the top of the screen, you will see seven tabs: **Home**, **Learning**, **Skills**, **Collaboration**, **Success Plan**, **Profile**, and **Reports**. These all lead to various areas of functionality in the LMS that will be discussed in more detail later in this user guide. The Home tab will always return you to the Home Dashboard view.

HOME PAGE PORTLETS

The LMS home page has a variety of portlets. A portlet provides quick access to specific areas of the system, such as a learner's current enrollments, the catalog search, or communities. Functional areas accessed through the portlets can also be accessed through the tabs and menus if you prefer.

In the NIH Announcements portlet, you will find special notices, updates, and/or quick links to courses just for NIH staff.

To change the appearance of your home dashboard screen, click **Configure This Page** at the top right of the portlets area.
You can select/deselect which portlets show up on your dashboard.

**IMPORTANT**: Be sure to keep the NIH Announcements portlet checked so you do not miss important information for NIH learners.

You may also change the order of your portlets by clicking the blue header bar, dragging, and dropping them into a new position.
MANAGING YOUR LEARNING (THE LEARNING TAB)

Under the Learning tab, the learner can access:

**In-Progress Learning** – Manage course offerings, certifications, curricula, success plan goals with an active registration.

**Transcript** – View your training history.

**Certifications** – Manage your certifications.

**Curricula** – View the curricula that may have been assigned to you.

**Continuing Education** – Manage continuing education credits.

**Order History** – Access orders (registrations) you have placed for LMS training items.

**Search Catalog** – Here you can search through all of the learning items available to you in the LMS.

**Knowledge Center** – Access informational documents available in the LMS.

**Learning Requests** – Submit requests or view your request history.

**Request Approval** – If you have been given the authority to approve offerings for other employees, they will show up in this area.

**Evaluations & Surveys** – Access evaluations and surveys assigned to you.

IN-PROGRESS LEARNING

Your In-Progress Learning area lists all the course offerings, certifications, curricula, and success plan items that you are currently registered for. You can use the enrollments list to launch content, drop, view details, begin registration, or schedule learning items. The Cataloged Learning tab includes all learning items that reside in the HHS Learning Portal. The External Learning tab is not in use at this time, but will eventually list training through outside (not in the HHS Learning Portal) organizations that have been approved and paid for through the LMS.
STEP-BY-STEP (USING THE IN-PROGRESS LEARNING ACTIVITIES PORTLET)

1. Upon successful login to LMS, locate the **In-Progress Learning Activities** portlet in your home dashboard.

2. You may …
   a. Click the title of an enrollment to access more details about the offering;
   b. View details about the offering using **View Details**;
   c. Access the content of an online course using **Launch Content**;
   d. Register for an offering by clicking **Begin Registration**;
   e. Select a method by which to sort the classes in the portlet using a drop-down menu;
   f. Go to **My In-Progress Learning** by clicking either “View All In-Progress Activities” or the portlet title.
**STEP-BY-STEP (VIEW MY IN-PROGRESS LEARNING)**

1. Upon successful login to the LMS, click on the **Learning** tab. **My In-Progress Learning** is the default screen. You will see a list of all courses (online and/or classroom) for which you are currently registered or order offering.

2. You may choose to sort your in-progress learnings by: **By Due date, By Assigned on Date, By Event Start Date, Alphabetically** or **By Registration Date**.

---

**STEP-BY-STEP (LAUNCH AN ONLINE COURSE FROM YOUR ENROLLMENTS)**

1. From the LMS Home page, click on the **Learning** tab. **My In-Progress Learning** is the default screen.

2. To the right of the online courses, you should see **Launch Content**; **click this button** to start the course.

3. Depending on how the course was programmed, you may have to click additional links to reach the course content. Follow the prompts given and proceed to the course content. It is important to make sure your web browser does not block the pop-up window which contains the course content.

4. The “**more actions**” link provides you with the options to view more details about the course and the option to drop the course.
STEP-BY-STEP (DROP AN ENROLLMENT)

1. Upon successful login to the LMS, click on the Learning tab. My In-Progress Learning is the default screen.

2. There are two ways to drop a course:

   a. For online courses, next to the Launch Content button is a hyperlink titled “more actions”. Click this link in order to bring up a small pop-up window which will give you the option to either “View Details” or “Drop” the course. Click on the word “Drop” to drop the selected course. The “Drop Offering” window will open. Scroll down to the button of the page then click on drop button to drop the offering.

   b. For instructor led training you will see a “Drop” button to the right of the offering. The drop Offering window will open, scroll down to the button of the page and click on the “Drop” button to drop the offering.
IMPORTANT: Depending on the organization sponsoring the offering - such as HHS University or the NIH Training Center - and whether tuition was involved, you may still have to pay for the offering. Be sure to check the official drop policy (regardless of whether it is entered in the LMS) for the organization sponsoring the offering.

3. You will be returned to My In-Progress Learning, and the offering you dropped will no longer appear in your list.

STEP BY STEP (LEARNING REQUESTS)

The Learning Requests section found in the Learning tab is where one can make requests for specific types of learning items. These types of learning items include public/private cataloged learning and future-dated external learning.

The “Request History” section allows users to view their previous requests for learning items.

1. From the LMS home page, click on the Learning tab.

2. Locate and click on the Learning Requests link on the upper left side of the screen; Submit Request is the default screen.

3. You may select one of the following options which represent the type of learning you want to request: “new public offering” (Cataloged Learning) or “new private offering” (Cataloged Learning). Click the radio button next to the type of learning you will be requesting and then click the Next button located at the bottom right of the screen to continue.
**Note:** The next screens will vary depending on the type of learning being requested. It is imperative that all fields marked with a red asterisk (*) are filled in with the correct data or the form will not be valid. Please make sure to fill in at the very minimum all of the required fields. After inputting data, click on the appropriate link at the bottom of the page to continue and finalize your request.

4. When selecting the **Request new public offering (Cataloged Learning)** the **Find Course for Learning Request** screen will open. Here you can enter the criteria to find the course you want to request.

5. When selecting the **Request new private offering (Cataloged Learning)** the **Request Private Offering** screen will open.
STEP BY STEP (REQUEST APPROVAL)

The Request Approval section found in the Learning tab is where one would approve a request for training if one is in the approval chain for another learner. This functionality is for making the second level of approval for training orders by the Additional Approver for Orders (AAO). The default tab will be Registrations and should display all registrations pending your approval. You can sort by “Order Item” or by “Person”.

Contact Information
- Contact Person: [Name]

Organization: HNAM424

Course Information
- Course Title: [Title]
- Delivery Type: Traditional Classroom
- Offering Type: Private

Scheduling Information
- Start Date: [Date]
- Session Template: [Template]
- End Date: [Date]
- Site: [Location]
- Location: [Address]
- Facility: [Facility]

Notes: 

Maximum Learners: [Number]
1. Upon successful login to the LMS, click on the **Learning tab**. My In-Progress Learning is the default screen.

2. Click on **Request Approval** from the menu item on the left-hand sidebar.

3. The **Registration Pending My Approval** screen will open.

4. If you have any Registrations waiting for approval just click the **Approve** or the **Reject** link under **Actions** to Approve or Reject the Registration.
TRANSCRIPT

The Transcript area provides a record of trainings that you have completed. You can specify the date range of your transcript items, print certificates of completion, review completed online courses, and export your record from this screen.

IMPORTANT: Not all training history has been migrated to the LMS. Your LMS transcript will only include those training items that are managed or recorded in the system, or has been added to your transcript through a data load or data feed. Training histories from the NIH Training Center's NIHITS system and CIT's Remedy were recorded in the LMS. Some training – such as NIH Ethics – is not yet recorded in the LMS at all.

If you are unsure whether you should be seeing a particular training record in the LMS, please submit a helpdesk ticket at: http://intrahr.od.nih.gov/helpdeskform.htm.

STEP-BY-STEP (VIEW TRANSCRIPT)

1. From the LMS Home page, click on the Learning tab.
2. Click on Transcript from the menu item on the left-hand sidebar. You will see the My Completed Courses screen and a list of training items you have completed. The Active tab is the default view.

   IMPORTANT: The date range of the transcript items viewed defaults to the past three months.

3. If you want to view items from before that, adjust the Completion Date after and Completion Date before dates appropriately. You can also select the specific Delivery Type of the course you are searching for.

4. Click Search.
5. The transcript results list will adjust to include all items completed (or marked complete) within the date range you specified.

**STEP-BY-STEP (REVIEW A COMPLETED ONLINE COURSE FROM TRANSCRIPT)**

The content from an online course you have completed and the course is still available in the catalog; it may be reviewed again from your transcript.

1. From the LMS Home page, click on the **Learning** tab
2. Click on **Transcript** from the menu item on the left-hand sidebar.
3. You can filter by **Completion Date after**, **Completion Date before** and **Delivery Type**
4. Locate the course you want to review, and click **Actions**, then click **View Learning Assignments**.

5. You will see a **Progress Report** screen for the selected course. Click **Launch Content** under the **Actions** column in the table.
6. Follow prompts to access the content as you did when you completed the course the first time. When you are finished, close the course pop-up content window(s) to return to the LMS screen.

STEP-BY-STEP (PRINT A CERTIFICATE OF COMPLETION)
The following steps will allow you to print out a certificate of completion for a training course that you have finished.

1. From the LMS Home page, click on the **Learning** tab.
2. Click on **Transcript** from the menu item on the left-hand sidebar.
3. Locate the course for which you want to print a completion certificate, and click **Print Certificate of Completion**.

4. The certificate will open in a pop-up window.
   **NOTE:** Make sure pop-ups are not blocked by your web browser.

5. Click on the print icon in the upper left corner of the certificate.
6. On the next dialog box, click **Export** to print all pages.

7. If a security message appears, right-click over the yellow bar. Then select **Download File**... You will then have to repeat steps 6 & 7.

   If this banner does not come up, go on to step 9.

8. A **File Download** dialog box will appear. Select whether you want to **Save** or **Open** the completion certificate file.

9. The certificate of completion will open with Adobe Reader. Use the print icon in Adobe Reader to print the certificate.
STEP-BY-STEP (EXPORT YOUR TRANSCRIPT)
The following steps will allow you to export your transcript to a Microsoft ® Excel spreadsheet.

1. From the LMS Home page, click on the Learning tab.
2. Click on Transcript from the menu item on the left-hand sidebar.
3. Click Export.
4. When the **File Download** dialog box appears, click **Save** or **Open** as desired.
CERTIFICATIONS

A certification is a prescribed set of courses that you must complete by a
deadline in order to gain professional recognition that you meet some knowledge
standard or competency to perform a task. Some certifications have to be
renewed periodically as well.

The Certifications area of the LMS allows you to manage certifications that have
been assigned to you by someone else or selected by you. Internal certifications
are those that are set up and administered in the LMS. External certifications are
those that are administered outside the LMS.

You may add external certifications to your LMS training record.

Note: Once a portion of a certification is completed, it can’t be deleted. Also,
certifications assigned via prescriptive cannot be deleted by the learner.

STEP-BY-STEP (VIEW AND MANAGE CERTIFICATIONS)

1. From the LMS Home page, click on the Learning tab.

2. Click on Certifications from the menu item on the left-hand sidebar. If you
   have been assigned certifications to complete, they will be listed here.

3. You may click the title of any certification listed to see detailed information,
   including the percentage complete, required and optional courses, and
   attachments added by administrators. The Complete Progress Report tab
   lists who assigned the certification to you and when.

4. Click on the Back button on the Main tab to return to My Certifications.

5. Hold your cursor over the Actions link next to the appropriate certification to
   see the Actions pop-up menu.
6. Under the **Actions** column you may have options to **View Certification History**, **View Progress for All Paths**, **Begin Registration**, or **View Acquisition History**.

7. **View Certification History** takes you to the same **Complete Progress Report** mentioned in step 4 above.

8. **View Progress for all Paths** gives you a pop-up window displaying the available paths through a certification and your progress for each. If more than one path is available through a certification and you wish to change your path, you could do that here.

9. **Begin Registration** takes you to register for the offering. You can complete registration or cancel.

10. **View Acquisition History** will show you the date certification was acquired and the version if applicable.

---

**STEP-BY-STEP (ADD AN INTERNAL CERTIFICATION)**

As a learner, you may elect to work on certifications in the LMS that have not already been assigned to you. An ‘internal certification’ is one that has been set up for administration through the LMS.

1. From the LMS Home page, click on the **Learning** tab.

2. Click on **Certifications** from the menu item on the left-hand sidebar. The **My Certifications** screen is the default.

3. Click **Add Certification**.
4. If you know the name of a specific certification you are looking for, type it in the **Name** field and click **Search**. Click **Search** with no information in the data fields to get a list of all certifications in the LMS that are available to you.

5. Click the box under the **Select** column to select a certification.

6. The screen will refresh and return you to **My Certifications**, where the certification you just selected will now appear in your list.

**STEP-BY-STEP (DELETE AN INTERNAL CERTIFICATION)**

If you select a certification, you have the ability to delete it later if you decide you no longer want to work on it.

1. From the LMS Home page, click on the **Learning** tab.
2. Click on **Certifications** from the menu item on the left-hand sidebar. The **My Certifications** screen is the default.

3. Hold your cursor over the **Actions** link next to the appropriate certification to see the **Actions** pop-up menu.

4. Under the **Actions** column you have options to **View Certification History**, **View Progress for All Paths**, **Begin Registration**, or **Delete**.

5. You will then receive a pop up window; click on **Delete Completely** to delete the certification.
Learner

6. Click **OK** to confirm you want to delete the certification.

**STEP-BY-STEP (ADD AN EXTERNAL CERTIFICATION)**

If you have earned a professional certification that was managed outside the HHS Learning Portal, you may still add it to your LMS record.

1. From the LMS Home page, click on the **Learning** tab.

2. Click on **Certifications** from the menu item on the left-hand sidebar. The **My Certifications** screen is the default.

3. Select the **External Certifications** tab. Click **Add External Certifications**. The **Add License & Certification** pop-up window will appear.

4. If another learner has entered an external certification and/or accrediting institution in the LMS, you will be able to use the **Pick … from the List** radio buttons, enter search criteria in the field provided, and select the appropriate certification and/or accrediting institution.

**IMPORTANT:** You should always search for the certification and accrediting institution before entering them manually. This helps maintain uniform data in the LMS and prevents having multiple versions of the same certification or accrediting institution due to spelling and abbreviation errors.

5. If you cannot find the certification and/or accrediting institution you are looking for, select the **Enter … manually** radio buttons, and carefully type the complete, official name of the certification and/or accrediting institution in the appropriate fields.
6. Use the calendar picker to choose the date for which you completed the certification (Acquired On Date).

7. If the certification expires, enter the Expiration Date.

8. Click Save.

9. You will be returned to the My Certifications, External Certifications screen where the certification you just added will appear.

10. Hold your cursor over Actions in the Actions column for a pop-up menu that will allow you to Edit Details of the certification if necessary or Delete the certification.

---

**STEP-BY-STEP (DELETE AN EXTERNAL CERTIFICATION)**

If you want to delete an external certification from your record for any reason, follow these steps.

1. From the LMS Home page, click on the Learning tab.
Learner

2. Click on **Certifications** from the menu item on the left-hand sidebar. The **My Certifications** screen is the default.

3. Select the **External Certifications** tab.

4. Click **Delete** from the **Actions** menu.

5. Click **OK** to confirm.
CURRICULA

Curricula are sets of learning offerings that constitute an area of specialization. They are more loosely structured than certifications because they generally do not meet a legal or safety requirement. For example, an education services operation specializing in the software industry could offer curricula in Database Management, Web Design, or Unix-based Programming. Each of these curricula could require a different set of the learning offered by the organization. The main difference between certifications and curricula is that curricula do not expire.

A curriculum can be assigned by yourself, your manager, your people administrator, your registrar, your job type, your role, or a prescriptive rule. After you are assigned a curriculum, you can select your default path and register for that completion path. The registered offerings in that path are added to your My Enrollments page. You then access and complete these offerings to acquire your curriculum.

STEP-BY-STEP (VIEWING YOUR CURRICULA)

The My Curricula page lists all curricula assigned to you, their completion statuses, and the person who assigned each to you, their acquisition date, and their due dates.

1. From the LMS home page click on the Learning tab.
2. Click on Curricula from the menu item on the left-hand sidebar
3. My Curricula is the default page and you can view a list of curricula that have been assigned to you.
Learner

4. Click a curriculum name link.

This will allow you to view the following curriculum details:

- **Name** - The name of the curriculum.
- **Description** - The description of the curriculum.
- **Person Name** - The name of the person who owns the curriculum.
- **Acquired On** - The date on which the curriculum was acquired.
- **Target Date** - The date on which the curriculum must be completed.
- **Assigned On** - The date on which the curriculum was assigned to you.
- **Status** - The curriculum status. This should be In Effect.
- **Assigned by** - The name of the person who assigned the curriculum to you.
5. There are two tabs: the **Main** tab and the **Complete Progress Report** tab.

a. In the **Main tab**, the **Graphical View** and **Detailed Status View** radio buttons are available. You can toggle between both views by clicking any one of the radio button. The graphical view is the default view.

b. In the **Complete Progress Report** tab, the assignment history and curriculum history details are listed.
CONTINUING EDUCATION

Moving down the left menu bar options, the Continuing Education area allows you to view any continuing education credits you have earned by taking courses through the LMS.

An LMS administrator must establish continuing education requirements in the system before they will be available for you to search for them.

Clicking on View Details will show the details for that Plan.
ORDER HISTORY

This area allows you to search for and view orders (registrations) you have placed for LMS training items in the past. It provides a record of your actions and indicates the status of a registration (cancelled, confirmed, billed, etc.).

STEP-BY-STEP (VIEW YOUR ORDER HISTORY)
1. From the LMS Home page, click on the Learning tab.
2. Click Order History from the left menu bar.
3. You can enter an order number to search for a specific order, or leave it blank to see a list of all training orders attributed to you and click Search.

4. From the list returned, you may see the status and other information about past orders.
5. Clicking on the Order Number will display the **Order Details** screen.
SEARCH CATALOG

The Search Catalog area allows you to search for training items in the LMS. Learning items may be found through Simple Search or Advanced Search. The Knowledge Center also allows these searches, but also includes a Browse Catalog link that has the catalog grouped by categories. The Catalog Search portlet also has a Browse: Category option available.

STEP-BY-STEP (USE THE CATALOG SEARCH PORTLET)

1. Upon successful login into the LMS, locate the Catalog Search portlet in your home dashboard.

2. You can use simple search by entering your term in the Search field, specifying where you want to look using the drop-down In field, and clicking Search;
NOTE: Simple search from the Catalog Search portlet returns a view similar to that of the Knowledge Center search area. Go to the Knowledge Center section of this guide for more information.

a. Clicking on the Advanced Search link opens the Advanced Search Screen. Here you can enter your search criteria.
b. Clicking the **Browse by Category** link opens the Browse by Category Screen.
You can click on any of the categories above for a list of offerings.
STEP-BY-STEP (REGISTER FOR TRAINING USING BROWSE BY CATEGORY)

An LMS catalog category was created specifically for NIH and includes several sub-categories. Training administrators should be using these categories to make courses easier for you to find.

1. From the LMS Home page, click on the **Learning** tab.

2. Click on **Knowledge Center** from the menu item on the left-hand sidebar. **Search Catalog** is the default view.

3. Click on **Browse Catalog**, which is a menu item located on the left-hand sidebar, below **Search Catalog**.

4. Note the category **1 - NIH Courses** with several sub-categories.

5. Click any category to see a list of offerings available to you. Click the title of an offering to view more details.

6. Click **Register** to register for the offering or **Launch Content** if the course requires no registration.
7. On the **Registration Confirmation** screen, pay careful attention to any tuition fees, notes, and important information regarding the course. For instance, you may see a screen which informs you that a manager’s approval will be required before successfully registering for a course.
STEP-BY-STEP (REGISTER FOR TRAINING USING SIMPLE SEARCH)

Simple search will allow you to enter part of a title to search courses, offerings, certifications, and curricula in the LMS.

1. From the LMS Home page, click on the **Learning** tab.
2. Click **Search Catalog** from the menu items on the left-hand sidebar.
3. Enter the search criteria you are looking for in the **Search** area and click **Search**.

4. A list of offerings matching your criteria is returned. Click the title of an offering to view more details.

5. On the course details screen, you will have the option to **Launch Content**, add the specific course to your plan (by clicking the **Add to Plan** link), and...
Learner

request a special type of offering for the course (by clicking on the Request Offering link).

STEP-BY-STEP (REGISTER FOR TRAINING USING ADVANCED SEARCH)

Use the Advanced Search option if you are having trouble finding what you are looking for. Be careful not to enter too much specific criteria, which will make your search too narrow.

1. From the LMS Home page, click on the Learning tab.
2. Click on Search Catalog from the menu items on the left-hand sidebar.
3. Click on the Advanced Search link.
4. Notice that you have many more options by which to search for training, including separate search links for Courses, Certifications, Curricula, Packages, Files, Central Recordings, Websites, Experts, Communities, Wikis, Discussions and Q&A. Enter your search criteria and click Search Learning Catalog.

IMPORTANT: Use the criteria carefully and remember that you will only see training items that match ALL the search parameters you specify. If you are unsure about a data element, it is best to leave that parameter field blank.
STEP-BY-STEP (VIEW SEATS AVAILABLE FOR AN OFFERING)

It is possible to view the seats available in an offering before you try to register for it. The following steps will work from any list of offerings returned in an advanced search.

1. From a Learning Offerings search result list, click Modify Table.

2. The Modify Table Display pop-up window appears.

3. Click on the check boxes in the Show column by Current Enrollment and Maximum Enrollment. Then click Save at the bottom of the screen.
4. You will now view the **Current Enrollment** and **Maximum Enrollment** columns. The difference between these values indicates how many seats are still available in the offering.

**NOTE:** Whenever a list of items in the LMS has a **Modify Table** link, feel free to check the additional options you have by showing or hiding data columns. You can choose the order in which columns are presented in the table and whether or not you want a data element to be put in ascending/descending order.
The **Knowledge Center** is much more powerful than the catalog search function. The Knowledge Center searches for content anywhere in the LMS, and includes courses as well as informative documents posted in the Knowledge Base. It allows filters and additional options for your search.

**Note:** If you search from the Catalog Search portlet in the Home Dashboard, you will default to the Knowledge Center search results screen.

**STEP-BY-STEP (SEARCH FOR KNOWLEDGE RESOURCES USING SIMPLE SEARCH)**

1. From the LMS Home page, click on the Learning tab.

2. Click on Knowledge Center from the menu item on the left-hand sidebar. The Search Catalog menu is the default.

3. Enter search criteria in the Search field and click Search.
4. Some basic information is displayed directly on the screen. Click on an item’s title for more information. From the Learning Details screen, you may register for the item or add it to your learning plan.

5. You may also register for an offering by clicking **Register** beneath the course title.

   **NOTE:** If the **Register** link does not appear, it means there are no currently scheduled offerings for that course.

6. If there is no opportunity to **Register**, you may click **Request Private Offering** or **Request Public Offering** to submit a learning request. (Please see the Learning Requests section of this guide for more information.)

7. If you do not want to register now, but want to return to the course at a later time, add it to your learning plan by clicking **Add to Plan**.

8. You can refine your search result by selecting or changing the optional filters on the right hand side of the screen. The one that have hyperlink will allow you to click it and see a pop-up menu of options you may choose to narrow
and refine your search. Uncheck the box by **Show Courses that are not offered** to limit the results to only courses that have currently scheduled offerings. Uncheck the box by **Show free resources only** to see all prices.
9. Other options include …

   a. **Advanced Search** – use this if you are having trouble finding what you are looking for. Be careful not to narrow your search too much by entering too many search criteria.

   b. **Search Tips** – offers some helpful advice about searching.

   c. **Search Preferences** – allows you to pre-set search criteria you use all the time.

   d. Show **All Resources** or only **Learning Catalog** items.

   e. Change the number of items you see per page, or sort by different criteria (Relevance, Alphabetical, Start Date, etc.).

![Search Catalog](image-url)
STEP-BY-STEP (BROWSE CATALOG)

You can browse the catalog by moving from one category of offerings to another, or by moving within a category by going from a higher level to more detailed levels of offerings. Browsing the catalog is a way to search for offerings by group. The top level is shown on the first page, and by clicking the links you can view deeper levels of groups or individual offerings in each group. Offerings appear as titles in a list and may display additional details depending on how your catalog administrator has configured the application. You can search the catalog depending on how your system has been configured by your administrator, which search method you wish to use, and which type of items you wish to find.

Specifically, you can:

1. From the LMS Home page, click on the **Learning** tab.
2. Click on **Knowledge Center** from the menu item on the left-hand sidebar. **Search Catalog** is the default view.
3. Click on **Browse Catalog**, which is a menu item located on the left-hand sidebar, below **Search Catalog**.
4. The catalog is grouped based on categories, areas or competencies. **Note** the category **1 - NIH Courses** with several sub-categories.
STEP-BY-STEP (BROWSE THE KNOWLEDGE BASE)

The Knowledge Base is a repository where LMS administrators can post documents that are not attached to courses or other formal learning items. Use of documents in the Knowledge Base is not tracked, and no training record will be recorded.

1. From the LMS Home page, click on the Learning tab.

2. Click on Knowledge Center, then Browse Knowledge Base from the menu item on the left-hand sidebar.

3. You should see an NIH folder. Click the + in front of NIH to expand the folder.

4. Click on NIH, or any subfolder title to list content stored there.

5. Click a document’s title for more details. Click Launch to open the document in a new browser window where you can print and/or save it to your computer using the browser print and save icons.
LEARNING REQUESTS

Use the **Learning Requests** area to notify an administrator that you would like an existing class to be offered in the future. Although learning requests are submitted and available to LMS administrators, you should contact the organization sponsoring the class you want if you do not hear from them in a reasonable amount of time.

**NOTE:** Learning requests are only for ‘Cataloged Learning,’ which are courses that already exist in the LMS, but with no active offerings. To request training that does not exist in the LMS, contact the appropriate training organization by phone or email.

Learning requests may be submitted for public offerings (available to anyone for registration) or private offerings (available only to a select group of people for registration.)

**STEP-BY-STEP (CREATE A LEARNING REQUEST FOR A PUBLIC OFFERING)**

If the course you need has no scheduled offerings, and you would like the sponsoring organization to schedule another open enrollment class, submit a learning request for a public offering.

1. From the LMS Home page, click on the **Learning** tab.
2. Click **Learning Requests** from the menu item on the left-hand sidebar. The **Select type of Learning Request** screen is the default.
3. Click the radio button **Request new public offering**.
4. Click **Next**.
5. Enter search criteria in the **Find Course for Learning Request** screen and click **Search**.
6. Click on the **Select** box next to the correct course title.
7. Enter the **New Learning Request** information, such as **Delivery Type**, **Requested Start On/After** dates, **Requested End On/Before** dates, **Location**, **Facility**, and/or **Notes**.

8. Click **Save** to submit the learning request.

9. You will be taken to the **Learning Requests** screen, where you should see the new learning request listed.
STEP-BY-STEP (CREATE A LEARNING REQUEST FOR A PRIVATE OFFERING)

If the course you need has no scheduled offerings, and you would like the sponsoring organization to schedule a class just for your organization, submit a learning request for a private offering.

1. From the LMS Home page, click on the Learning tab.
2. Click Learning Requests from the menu item on the left-hand sidebar. The Select type of Learning Request screen is the default.
3. Click the radio button Request a private offering.

4. Click Next.
5. Provide as much information as possible on the Request Private Offering screen, making sure to complete all required fields (red with an *).

6. Click Save at the bottom of the Request Private Offering screen when you are finished.
7. You will be taken to the Learning Requests screen, where you should see the new learning request listed.
**STEP-BY-STEP (VIEW LEARNING REQUEST HISTORY)**

You may view learning requests submitted by you or for you. Do the following in order to check their status or make changes:

1. From the LMS Home page, click on the **Learning** tab.

2. Click **Learning Requests**, then **Request History** from the menu items on the left. You should see the **Learning Requests** screen with a list of your learning requests below the search area. Use the search parameters only if you want to narrow the list displayed.

3. Click the title of any **Course** to access details about it, including a **Register** option.

4. Click **Edit Details** to change the details of the learning request itself.

5. Click **Cancel** to withdraw the learning request. Click **OK** to confirm the cancellation.
EVALUATIONS & SURVEYS

You will only find items in your Evaluations or Surveys area if they have been assigned to you. Evaluations could be attached to courses by administrators, and surveys may be assigned to specific learners or groups.

STEP-BY-STEP (COMPLETE AN EVALUATION)

1. From the LMS Home page, click on the Learning tab.

2. Select Evaluations & Surveys, then Evaluations from the left menu items.

3. If an evaluation was attached to a course you took, it will be listed in the default Current tab. Launch the evaluation and complete it as directed.

4. Evaluations you have finished will be listed under the Completed tab.
STEP-BY-STEP (COMPLETE A SURVEY)

1. From the LMS Home page, click on the **Learning** tab.

2. Select **Evaluations & Surveys**, then **Surveys** from the left menu items.

3. If a survey has been assigned to you, it will be listed in the default **Current** tab.

4. You have the option to **Accept** the survey, **Accept but Anonymously** or **Decline** the Survey.

5. Click **Accept** and you will have the option to **Launch** the Survey.

6. Click **Launch**.
7. **Note:** Be sure you follow the instructions of the survey and complete all the questions.
MANAGING YOUR SKILLS (THE SKILLS TAB)

Under the **Skills** tab, the learner can get to:

**Certifications** – Learners can access **My Certifications** and the **Certification Gap Analysis**. The **DEFAULT** view is **My Certifications**.

**My Competencies** – All competencies is the default. Learners can view all competencies (**Held Competencies, My Required Competencies and Proposed Competencies**)

**Self Assessment History** – Allow learners to view all assessments submitted by the learner

**Multi-Rater Assessments** – Managed Assessments is the default view.

CERTIFICATIONS

STEP-BY-STEP (VIEW AND MANAGE MY CERTIFICATIONS)

1. From the LMS Home page, click on the **Skills** tab.

2. Click on **Certifications** from the menu item on the left-hand sidebar. The **My Certifications** is the default screen. If you have been assigned certifications to complete, they will be listed here
3. You may click the title of any certification listed to see detailed information, including the percentage complete, Description of certification, The Acquired on Date, Assigned on date, Status, Assigned by. The **Complete Progress Report** tab lists who assigned the certification to you and when.

4. Click the **Back** button location on top Right hand side on the **Main** tab to return to **My Certifications**.

5. Under the **Actions** column you have options to **View Certification History**, **View Progress for All Paths**, **Begin Registration**, or **Delete**. Hold your cursor over the **Actions** link next to the appropriate certification to see the **Actions** pop-up menu.

6. **View Certification History** takes you to the same **Complete Progress Report** mentioned in step 4 above.
7. **View Progress for all Paths** gives you a pop-up window displaying the available paths through a certification and your progress for each. If more than one path is available through a certification and you wish to change your path, you could do that here.

8. **Begin Registration** takes you to register for the certification.

9. **Delete** will take you to a delete confirmation page where you can delete the certification by click “Delete from plan(s)” button under activity reside plan(s).
MY COMPETENCIES

The LMS allows you to self-select competencies you want to work on. Your supervisor and your IC administrator can also assign competencies to you. You may assess your competency proficiency level and find training to improve your skills and knowledge.

1. From the LMS Home page, click on the **Skills** tab.
2. Click on **My Competencies** from the menu item on the left-hand sidebar. The **All Competencies** is the default screen.

**STEP-BY-STEP (VIEW HELD COMPETENCIES)**

‘Held’ competencies are those for which an assessment exists in the LMS. The **My Held Competencies** screen allows you to view only the competencies you have assessed already. In addition to the date last assessed, many of the same functions are available to you. You may view the competency details (click title), view assessments, and initiate a new multi-rate assessment or self assessment in the competencies you select.

1. From the LMS Home page, click on the **Skills** tab.
2. Click on **My Competencies** from the menu item on the left-hand sidebar.
3. Click **My Held Competencies** from the menu item on the left-hand sidebar.
4. Under the **Actions** column you have options to **View Assessments**, complete a **New Self Assessment** and initiate a **New MRA**. Hold your cursor over the **Actions** link next to the appropriate assessment to see the **Actions** pop-up menu.

5. **View Assessments** allows you to view Assessment details. Click on the **Actions Link** under the **Actions** column and select **View Assessment details** on the pop up.
The **Self Assessment Details** page shows you the assessment required level, current level held, date assessment was assigned and completed.

6. **New Self-Assessment** allows a learner to assess the held level for the selected competency. You can add a new assessed level for the competency by choosing the assessed level from the drop down box and then save.
7. **New MRA** allows a learner to initiate a new MRA for that competency. Click on New MRA.

You will see a **New Multi-Rater Assessment** screen. Below the competency list, you will indicate the people you want to include as **Raters**.
8. Type the person’s legal first name and last name in the Name(s) box and click Search.

**NOTE:** If you do not find the person you are looking for, use Advanced Search instead. Advanced Search will allow you to search based on various criteria and/or partial spelling of names. Remember that the LMS contains people’s LEGAL names, not nicknames.
9. Click the checkbox next to each person in the **People** results list that you want to assess your competencies.

10. Scroll to the bottom of the pop-up window and click **Select**.

11. Your supervisor will need to log in to the LMS to approve or reject people you have added to your MRA. Click **Save and Submit for Approval** when you are ready to send the MRA request forward.
STEP-BY-STEP (VIEW REQUIRED COMPETENCIES)

1. From the LMS Home page, click on the Skills tab.
2. Click on My Competencies from the menu item on the left-hand sidebar.
3. Click on the My Required Competencies
4. You may filter the list of required competencies by any of the criteria in the View By drop-down menu.

5. You may also modify the table to clear unused columns from your display. Click Modify Table. Deselect the check box under the Show column in the Modify Table Display pop-up window. Click Save.
6. Click on the title of a required competency to access details about it, including a description, the competency group it belongs to, proficiency level descriptions, behavioral descriptors, and any attachments added by administrators.
### Competency Details: Accountability (HHS)

**Competency Name:** Accountability (HHS)

**Description:**
Sets challenging goals, tracks progress towards them, solves performance problems, and demonstrates urgency and drive towards achieving them. Key Behaviors: Pays attention to the quality and quantity of performance. Tracks progress against goals. Strives to achieve goals. Sets clear, well-defined desired outcomes for work activity and tracks progress. Establishes plans that break complex projects into their component parts, each with its own timeline. Sets challenging goals and demonstrates a strong sense of urgency and persistence about accomplishing them. Seeks and gives performance feedback to others. Addresses performance problems promptly.

**Competency Groups:**
- Basic Leadership Competencies (HHS), Supervisory Competencies (HHS)

### Proficiency Levels

<table>
<thead>
<tr>
<th>Level</th>
<th>Level Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Awareness</td>
<td>You have no training or experience.</td>
</tr>
<tr>
<td>2</td>
<td>Basic</td>
<td>Basic training has been received. The only experience gained has been in a classroom and/or experimental scenarios, or as a trainee on-the-job. You would be expected to need some help when performing the skill.</td>
</tr>
<tr>
<td>3</td>
<td>Intermediate</td>
<td>Repeated successful experiences have been completed. Help from an expert may be required from time to time, but you can usually perform the skill independently.</td>
</tr>
<tr>
<td>4</td>
<td>Advanced</td>
<td>You can perform the actions associated with this skill without assistance. You are certainly recognized within your immediate organization as the person to ask when difficult questions arise regarding this skill.</td>
</tr>
<tr>
<td>5</td>
<td>Expert</td>
<td>You are known inside and/or outside the organization as an expert. You can answer any question about the skill and most questions related to the field where the skill is used.</td>
</tr>
<tr>
<td>6</td>
<td>CW - Proficiency Level 1</td>
<td>Test</td>
</tr>
<tr>
<td>7</td>
<td>CW - Proficiency Level 2</td>
<td>Test blah</td>
</tr>
<tr>
<td>8</td>
<td>BLM - Uber Proficiency</td>
<td>CDC Test Proficiency Level</td>
</tr>
</tbody>
</table>

### General Behavioral Descriptors

- No items found

### Attachments

- No items found
STEP-BY-STEP (ADD A REQUIRED COMPETENCY)

1. From the LMS Home page, click on the **Skills** tab.
2. Click on My Competencies from the menu item on the left-hand sidebar.
3. Click on the **My Required Competencies**, then click on Add Required Competency located on the top right hand-side of the screen.

4. Click **Add Required Competency**.
5. In the **Add Required Competencies page**, enter the **Name** of the competency you want to find and click **Search**. You may also enter a **Competency Group** in the competency Group field.
6. Select the desired competency by clicking the **Select** box in the appropriate row.
4. Select Set Required Levels button at the bottom of the page to set

6. Select the required level from the “required level” drop down.

7. Click Save and exit. The new competency will now appear in the My Required Competencies list.

STEP-BY-STEP (VIEW AND ADD PROPOSED COMPETENCIES)

A proposed competency is one that is associated with a specific learning item, such as a course. The completion of the learning item suggests you are qualified to hold that competency. The process proposes these competencies to you based upon recent completion of learning that has the competency associated with it.

To view and add your proposed competencies:

1. From the LMS Home page, click on the Skills tab.
2. Click on My Competencies from the menu item on the left-hand sidebar.
3. Click on the Proposed Competencies, the proposed Competencies screen is displayed with a list of competencies.
4. Select an option from the **Proposed By** Dropdown list
5. Select an Option from the **Proposed Within** dropdown list.
6. A list of proposed competencies that fit your search criteria is displayed.

7. Click the link for a competency to view its details.
8. Scroll down at the bottom of the search result page you have the option to add the competency as a held competency or delete it. You can also do this simply by clicking on the **Actions** link under the Actions Column for the competency.
SELF ASSESSMENT HISTORY

STEP-BY-STEP (VIEWING SELF-ASSESSMENT HISTORY)
1. From the LMS Home page, click on the Skills tab.
2. Click on Self Assessment History from the menu item on the left-hand sidebar.
3. This takes you to the Self Assessment History page to view all assessments that you submitted.

4. You can narrow the list of self-assessments in the Self Assessment History page by providing the appropriate search criteria in the fields for the assessments that you want to display such as Competency name, Assessed on with date less than or greater than, Approval Status and then click the Search button.
5. The list of self-assessments that fit your search criteria is displayed.
6. Hover your mouse over the Actions link for the competency that has self-assessments that you want to view. You will have the following options: “View Descriptors” or “View Assessment Details” or “View Assessments”.
   a. The View Descriptors option shows the proficiency level and its description.
   b. The View Assessment Details provides you with the details of the self assessment.
   c. The View Assessments, shows a list of all self-Assessments.
MULTI-RATER ASSESSMENTS (MRAS)

Multi-rater assessments (MRAs) are also known as 360° assessments. The LMS allows you to initiate such an assessment for yourself. In this area of the LMS, you may manage your multi-rater assessments and assess others if you have been approved as a rater.

STEP-BY-STEP (MANAGE YOUR MULTI-RATER ASSESSMENTS)

1. From the LMS Home page, click on the Skills tab.
2. Click on Multi-Rater Assessments from the menu item on the left-hand sidebar.
3. You will be defaulted to My Assessments Tab.
4. The Manage Assessments screen is then displayed. You may Modify Table to change the columns of data you see. You also have Print and Export options. Completed MRAs will be listed under the Completed tab.
5. Click on an **MRA Title** to view the assessment details. You can see whether your **Nominated Raters** have been approved by your supervisor (**Approval Status**), and whether he/she has accepted their role as rater on your assessment (**Rater Acceptance**). You will also be able to see if your supervisor has rejected a rater you chose.

![MRA link](image)

![My Assessments](image)
6. Select the **Competencies** tab to see the competencies included in your MRA, as well as their current assessment level. (You may click the title of any competency to see more details about it.)

![Assessment Details: Learner Test MRA for Approval Process](image1)

7. From the **Manage Assessments** screen, you may also **Edit** a **Current** MRA. Click **Edit** in the same row as the MRA you want to change.

![Manage Assessments](image2)
8. You will see the **MRA Details** screen.

![MRA Details Screen]

9. From this screen, you may change the **Closes On** date.

10. You may also **Add Raters** to include more people in the MRA. (See steps 10-13 in **STEP-BY-STEP (INITIATE A COMPETENCY MULTI-RATER ASSESSMENT)** above.)

11. If you choose to re-nominate a rejected rater, click **Nominate Again**. The person will automatically appear under the **Raters** list again, pending approval.

12. After making changes, click **Save & Submit for Approval**.

13. Click **Yes** on the confirmation pop-up window.
STEP-BY-STEP (COMPLETE COMPETENCY ASSESSMENTS FOR OTHERS)

You could be named as a rater for someone else’s multi-rater assessment. The following process details how to complete an assessment for someone else.

1. From the LMS home page select the skills tab.
2. Click Multi-Rater Assessments, then Assess Others from the menu items on the left-hand sidebar.

3. If you have been approved as a rater for someone else, an assessment will be listed on the Conduct Assessments screen.
4. Each assessment will give you the opportunity to either reject your role as a rater or accept your role and complete the assessment. Keep in mind that comments you enter in the assessment form may be seen by the ratee’s supervisor.
5. Assessments you have completed in the past will be found under the Completed tab.
MANAGING YOUR LEARNING PLAN (SUCCESS PLAN TAB)

Under the Success Plan tab on the learner page, the learner can view, add, and edit the activities that are on their current learning plans. At NIH, learning plans may also be known as IDPs (Individual Development Plans).

MY PLANS

STEP-BY-STEP (MANAGE YOUR PLANS)

1. From the LMS home page, click on the Success Plan tab.

2. Click on My Plans, My View, and the Activities list tab is the default screen of “My Plans” page. The page shows a list of items on your learning plan.

3. You may View Current Activities or View Closed Activities depending on which radio button is selected.

4. As a default, the learning plan items are grouped by Activity Type. You may list them in chronological order by selecting Due Date from the Group By drop-down menu.
5. The View Activities table shows the **Name** of the learning item, type of activity, **Status**, **Due Date**, and **Source** of the assignment. Click the **Name** of any item to view additional details and options.

![View Activities Table](image1)

6. Different types of learning plan activities will allow you to access different options under the **Actions** column. Hold your cursor over **Actions** to see the pop-up menu choices.

   a. Certifications and curricula will allow you to **Start Registration**, which takes you to the same item detail screen as clicking the item’s **Name**. You may register for courses and see other details here. You may also **View Notes** about the learning item if any have been attached. You can also **Delete** a curriculum or certification.

![Actions Pop-up](image2)
b. Courses will allow you to **Launch** or **Register** for the course, utilize quick links to **View Enrollments** or **View Completed Courses** or **View Notes** associated with the course or **Delete** the course.

---

**STEP-BY-STEP (ADD AN ACTIVITY TO YOUR PLANS)**

1. From the LMS home page, click on the **Success Plan** tab.
2. **My Plans**, **My View** and the **View Activities** tab is the default screen and shows a list of items on your plans.
3. Click **Add Activity**.
4. You will see a pop-up window listing the types of activities you may add to your learning plan in the LMS. Add an Activity (such as Course, for example).

**IMPORTANT:** You should not add Competencies to your learning plan. Competencies you want to develop should be added under the Competencies functional area of the LMS. (See previous section in this manual.)

**Add Goal** can be used to add any type of activity not administered through the LMS. Activities not administered through the LMS could include NIH or HHS courses not in the LMS, courses offered by external organizations (universities or vendors), external certifications, on-the-job training opportunities, developmental job rotations, etc.

5. The type of activity you select will determine which pop-up window you see next. After selecting the type of activity, fill in required information and then follow the prompts.

6. For this example, click **Add Course**.

7. The **Add Course** pop-up window appears. Fill in all of the required information and then click **Next**.
**Learner**

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

7. Click next and the item you added will now appear in your **View Activities** list.

---

**PLAN APPROVALS**

Administrators configure approval chains in plan forms. They can create plan forms that have no approvals at all and they can create plan forms that require formal approvals or acknowledgements. You cannot change whether or not a plan requires approval or acknowledgement. You can change the members of the approval chain if the administrator configured the plan form to allow you to do so.

A plan that requires approval moves to the pending approval state after someone creates the plan. Each approver in turn approves the plan. If an approver rejects the plan, then the plan moves to the rejected state. When someone returns the plan to the pending approval state, all approvers must approve the plan again. When the last approver approves the plan, it moves to the active state.

A plan that requires acknowledgement moves to the pending acknowledgement state after someone creates the plan.

Each approval in turn acknowledges the plan. Acknowledgement confers no approval or rejection of the plan.

Acknowledgment only acknowledges the plan's existence. No one can reject a plan that requires acknowledgement.

When the last approver acknowledges the plan, it moves to the active state.

---

**STEP-BY-STEP (SUBMITTING YOUR PLAN FOR APPROVAL)**

1. From the LMS home page, click on **Success Plan**

2. Click **My View** from the left-hand sidebar menu. My View page displays.

3. Open the Plan Details page for the plan
   a. Click the **Plans List** tab.
   b. The **Plans List** tab opens.
c. Click the name of the plan that you want to open, the **Plan Details** page displays.

4. Click the **Activate Plan** button. You will receive a confirmation page and submits your plan to approvers for approval or acknowledgement. If you are one of the approvers, then the system will update your approver status to approved or acknowledged.
STEP-BY-STEP (APPROVING YOUR PLAN)

1. From the LMS home page, click on **Success Plan**
2. Click on **Plan Approvals** from the left-hand sidebar menu.
3. If any plans show under the “Plans to Approve” page click the Approve or Acknowledge link for the plan you want to approve or acknowledge.
4. The application approves your plan
5. You can complete your plan. If there are other approvers for our plan, then you need to wait for them to approve or acknowledge your plan before you can do this task.

RECOMMENDATIONS FOR ME

LMS administrators have the option of adding recommendations to courses in the system. If any recommendations exist for courses you have completed, they will appear on the Active tab of the **Resources Recommended to Me** page. You will then have the option to register for a recommended course, launch it, view details, bookmark or ignore, as desired.
## Resources Recommended to Me

View the knowledge resources that have been recommended to you.

- Active
- Bookmark
- Ignored

### See Recommendations

**Recommended in the Past (Days)**: 10
**Recommendation Type**: All

- **Group by Type of Recommendation**

### Active Recommendations

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Recommendation Type</th>
<th>Sources</th>
<th>Recommended On</th>
<th>Actions</th>
</tr>
</thead>
</table>

### Actions Pop-up

- View Detail
- Launch
- Bookmark Recommendation
- Ignore Recommendation
MANAGING YOUR PROFILE (THE MY PROFILE TAB)

Under the Profile tab, learners can see what their personal details, manager, direct reports, and also what roles are assigned. The learner can get to:

- **Full Profile** – The information in this section is almost all coming from automated data feeds from Capital HR and/or the NIH Enterprise Directory (NED). If any of your information you see here is incorrect, you must contact your AO and have it corrected in the source system. The one exception is Manager (Supervisor). If the manager listed is not your current supervisor, and LMS Local Learning or Human Capital administrator can update it for you. You will find a list of LMS administrators in the ICs at [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf)

- **My Contact Information** – This screen will allow you to update your work phone, fax, and email. (You should not enter your home phone number in this system.) Your email address is particularly important as it must be correct for you to receive any automated notifications coming from the LMS (including reset password messages). Be sure to click the save button after making any changes.

![Profile Tab](image)

**STEP-BY-STEP (VERIFYING YOUR USER PROFILE)**
1. From the LMS home page, click on the Profile tab.
2. Click **Full Profile** from the menu item on the left-hand sidebar.
3. You can add your picture by clicking on the Pencil icon, modify items in your profile by clicking on the Edit Profile Snapshot link, or add/edit your personal objective by clicking on the Pencil icon to the right of the words 'Personal Objective'.

4. Scrolling down to the bottom of the page will show an expanded view of your Current Job Information, Competencies, Licenses and Certifications, and Languages. You can click ‘Expand All’ before scrolling down to expand all of the subcategories.

**STEP-BY-STEP (UPDATING YOUR CONTACT INFORMATION)**

1. From the LMS home page, click on the Profile tab.
2. Click My Contact Information from the menu item on the left-hand sidebar.
3. You can update the following fields your Email address, Home phone, work phone and fax.
4. Click enter the correct information in the appropriate field
5. Click Save and Close.
GENERATING REPORTS (THE REPORTS TAB)

Under the Reports tab on the learner page, the learner has access to a variety of reports in the LMS. Reports can be Executed, Emailed and Subscribed to if desired.

1. If the e-mail option is selected a screen will open for the Learner to enter the e-mail address to where the report will be sent. Learner can also click Preview Report to see the Report before sending or just click Send to send the report.
2. The **Execute** option will run the report and display the report on the screen. **Note:** Depending on the report selected additional criteria might be needed before running the report.

3. The **Subscribe** option will open the **Report Subscription** Screen.

4. Click on the **New Report Subscription** link.

5. The Report Subscription Screen will open and the Learner can enter an e-mail address and select a frequency criteria for the report. The report will be sent to the e-mail address on the selected frequency (weekly, daily, etc.).
HELPFUL INFORMATION

HHS Learning Portal log on page
https://lms.learning.hhs.gov

HHS Learning Portal Help Desk
1-866-246-5440
DHHSHelp@gpworldwide.com

NIH Training Center web site
http://trainingcenter.nih.gov

NIH LMS Information
http://trainingcenter.nih.gov/lms_courses.html
http://hr.od.nih.gov/hrsystems/benefits/lms/lmssupport.htm

LMS Administrators in the ICs

HR SYSTEMS HELP DESK TICKETS- Use this link to submit your Help Desk tickets.
http://intrahr.od.nih.gov/helpdeskform.htm