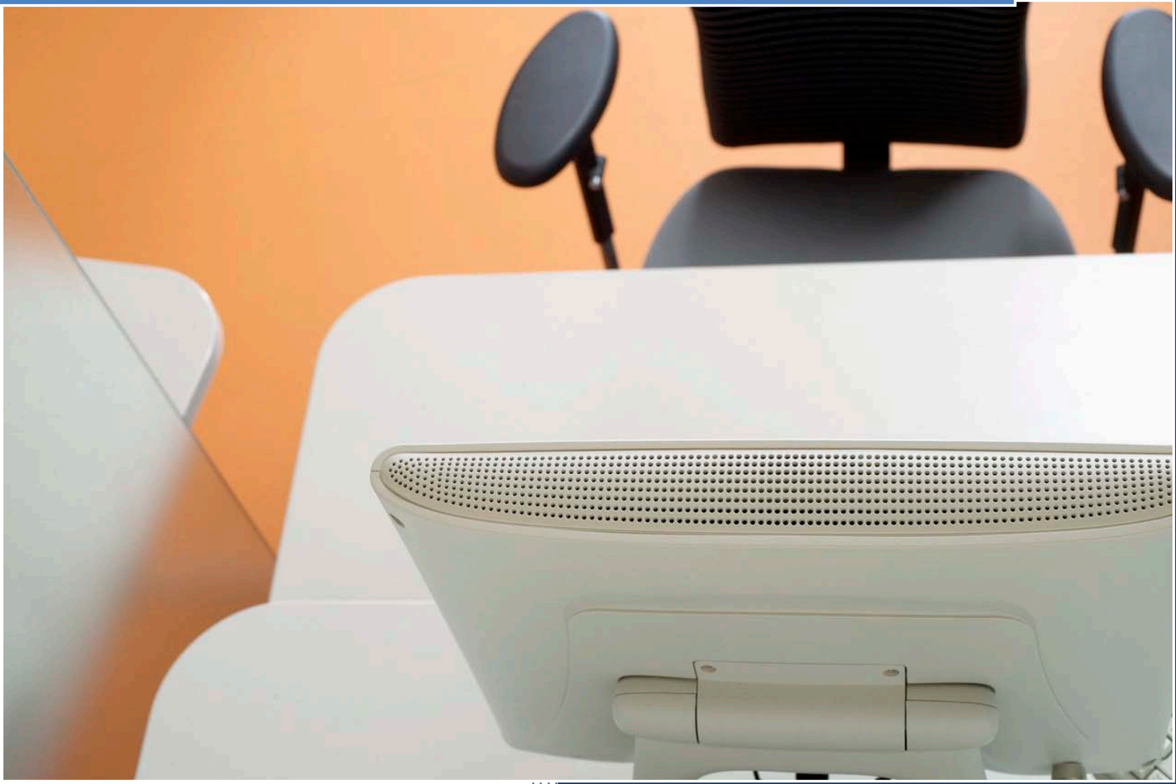
HHS Learning Portal

LMS User Guide



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1.0	12/10/2009	Kimberly Hill NIH LMS Program Manager		Initial publication

Please submit any questions or suggestions for changes to LMSSupport@mail.nih.gov.

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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) account 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 contact the LMS Help Desk at 1-866-246-5440 or DHHSHelp@gpworldwide.com.

If you have questions about NIH LMS policy, please contact the NIH LMS Team at LMSSupport@mail.nih.gov.

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.

MAC USERS

Mac users should view online courses with the Firefox browser, not Safari.

LMS INFORMATION

Additional information about the HHS Learning Portal/LMS can be found at http://trainingcenter.nih.gov/LMS_info.html.

The HHS Learning Portal/LMS log on screen can be found at https://lms.learning.hhs.gov/, and NIH-specific log on instructions can be found at http://trainingcenter.nih.gov/PDF/LMS/EmployeeLogOnInstructions.pdf.

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 some 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 Corp Personnel Database

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

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

- **E-mail**: Accurate email addresses in the LMS will ensure learners receive notifications generated in the LMS.
- **Manager**: Having the correct manager (a.k.a. supervisor) listed will allow supervisors to view their direct reports and access training and development information about them.
- **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.

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 see http://trainingcenter.nih.gov/pdf/lms/LMS-Admins-Lists.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.

Closing a Competency Gap – A competency gap can be closed by increasing the calculated gap number to zero or higher. Closing the gap can be accomplished by completing/updating a learner self-assessment or a manager/supervisor assessment, usually after relevant training has been completed.

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."

Competency Gap – This is a measure of the learner's current competency proficiency minus his/her required proficiency level. This value indicates what training, development, and learning is needed in order to make measurable increases to performance.

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.

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.

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

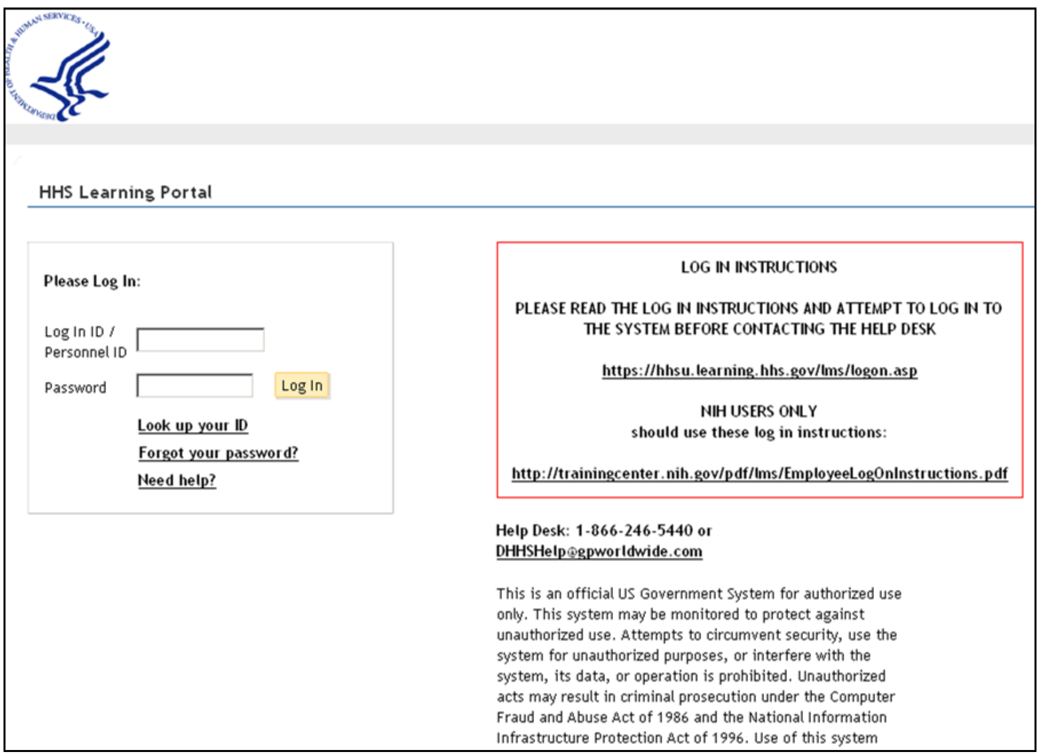
THE LOGIN PAGE

The HHS Learning Portal (LMS) requires that you enter a username and password to gain access. It is important to remember that, because this is a Department-wide system, the credentials used to access the LMS are not the same credentials that you use to access your computer and other NIH resources.

To log on to the HHS Learning Portal, visit https://lms.learning.hhs.gov/.

The login page is the first page you come to when attempting to enter the HHS Learning Portal. On the login page there are links for:

- Look up your ID
- Forgot your password?
- Need help?
- NIH-specific log in instructions
- LMS Help Desk email



STEP-BY-STEP (LOG IN TO THE HHS LEARNING PORTAL)

Log in instructions for NIH users are also available from a link on the LMS log in page.

1. Determine your Username and Password. Use the following table to determine your Username and initial Password.

	Federal Employees	Commission Corps Officers	All Other Staff
Username (format)	8-digit EHRP/Capital HR ID#. **Sample: 00012345**	PHS serial number plus 3 zeros. **Sample: 12345000**	"NIH" plus your badge number. **Sample: NIH0012345678**
Username (look up)	Go to https://learning.hhs.gov/employeenumber.asp. • Enter your *legal* First name • Enter your *legal* Last name • Enter the last four digits of your SSN	Go to https://learning.hhs.gov/employeenumber.asp. • Enter your *legal* first name • Enter your *legal* last name • Enter the last four digits of your SSN	Go to https://learning.hhs.gov/employeenumber.asp. • Enter your first name • Enter your last name • Enter four zeros ***instead of your SSN***
Password (initial)	First letter of your legal First name (upper case) *plus* your Last name (lower case) *plus* the last 4 digits of your SSN. **Sample: Mr. John Doe = Jdoe1234**	First letter of your legal First name (upper case) *plus* your Last name (lower case) *plus* the last 4 digits of your SSN. **Sample: Officer John Doe = Jdoe1234**	First letter of your First name (upper case) *plus* your Last name (lower case) *plus* 4 zeros. **Sample: Ms. Jane Doe = Jdoe0000**
Log On (sample)	 **Figure 1: Federal Employee Log On Sample**	 **Figure 2: Commission Corps Officer Log On Sample**	 **Figure 3: All Other Staff Log On Sample**

2. After logging on the first time, the system will prompt you to create a new, personalized password that is more secure using the following New Password Requirements:

New Password Requirements

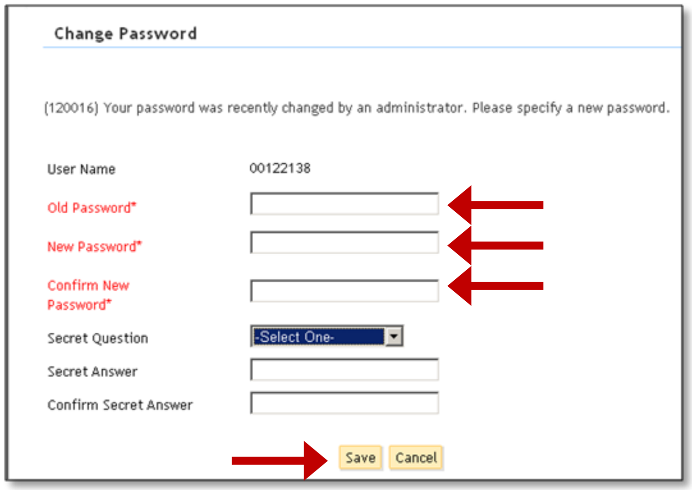
- Must be a minimum of 8 characters in length.
- Must contain at least one upper-case character and one lower-case character.
- Must not include any part of your login ID or name.
- Must contain a minimum of 2 alphabetic characters.
- Must contain a minimum of 1 numeric character.
- Must contain a minimum of 1 special character.
  : # $ % ^ & * , _ ? / ; : \ |
- Cannot be changed more than once every 24 hours.
- Cannot be one of your 5 previous passwords.

Tip: Making your new LMS password the same as the one you use to log on the NIH systems will make it easier to remember.

3. Enter the temporary password assigned to your account in the **Old Password** field.
4. Enter your new password in both the **New Password** and **Confirm New Password** fields.
5. Optional: Enter a **Secret Question**.

Note: The secret question is an optional layer of added security, used to restrict unauthorized access to your LMS password through the Password Reset tool. Although the setup of a secret question is NOT required, it is encouraged. If you choose to select a secret question and answer, then this information will be required for you to be able to use the "Forgot Password" feature later.

6. Click **Save** to navigate to the HHS Learning Portal dashboard screen.

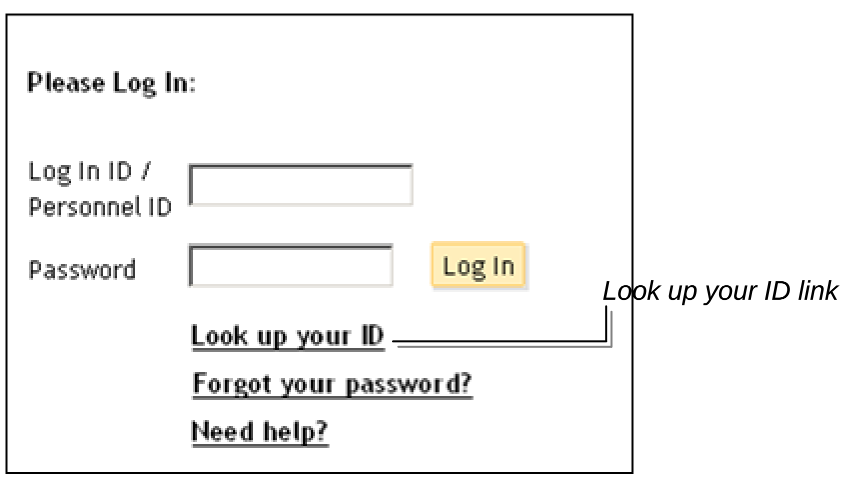


IMPORTANT: All fields in red with an asterisk (*) require data in order to save changes.

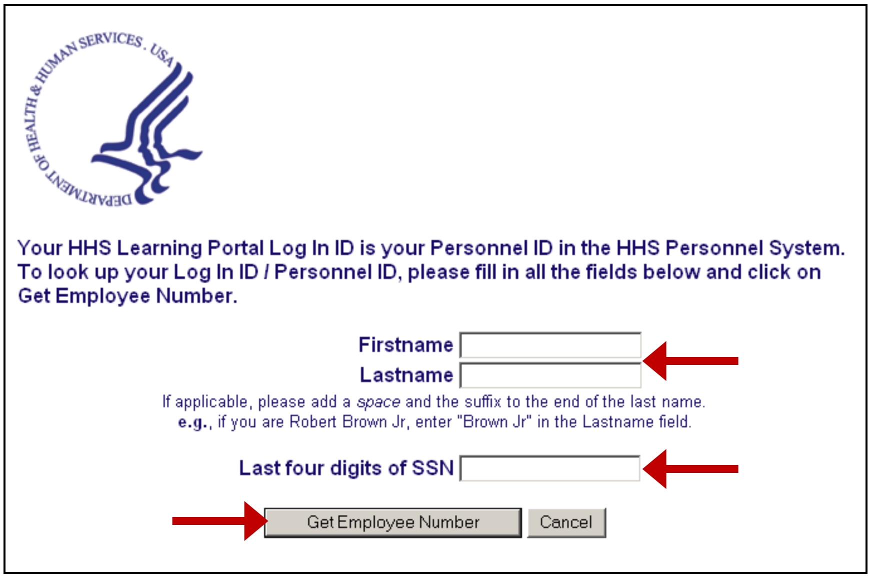
STEP-BY-STEP (LOOK UP YOUR LOG IN ID / PERSONNEL ID)

If you do not know your Log In ID / Personnel ID for the LMS, use the **Look Up Your ID** link on the log in screen to retrieve it. Enter your legal first name and last name. If you are a Federal civilian employee or a Commissioned Corps Officer, enter the last four digits of your social security number. All others should enter four zeros.

1. Navigate to the HHS Learning Portal log in page: https://lms.learning.hhs.gov/
2. Click on **Look up your ID**.



3. The system will prompt you fill in your **Firstname** and **Lastname** and the **Last four digits of SSN**.
4. Click on **Get Employee Number**.

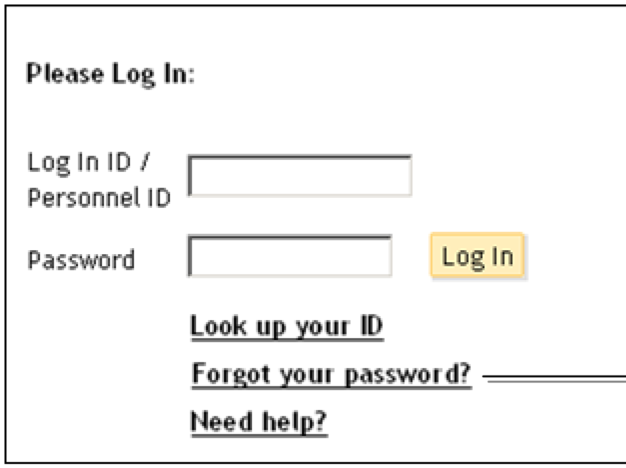


5. If the information has been entered and matches your user profile information, it will return with your Log In ID / Personnel ID.

STEP-BY-STEP (RESET YOUR PASSWORD)

If you forget your password, you may request that the self-service password reset tool email an auto-generated, temporary password to you. When you access the LMS for the first time after receiving the temporary password, you will be prompted to change it.

1. Navigate to the HHS Learning Portal log in page: https://lms.learning.hhs.gov/
2. Click on **Forgot your password?**



3. Enter your LMS username in the **Log In ID / Personnel** field.

   NOTE: To determine your LMS username, click the **Look up your ID** link on the HHS Learning Portal log in page and follow the prompts.

4. Click **Submit**.

   NOTE: If additional information is required, you will be prompted to enter it. Otherwise, you will be provided with contact information for additional support.

5. Verify that the email address to which your temporary password will be sent is correct.

   IMPORTANT: If the email address listed is incorrect, then you will not receive the temporary password you requested. If your email address is incorrect, please contact the LMS Help Desk to have it updated.

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, **Proxy** (only if you have been designated as someone's proxy), 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.

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

Preferences: This option allows you to change the look and functionality of your dashboard screen (**Preferences** tab) or change your **Password**. Although you will also see an option for **Proxy Settings**, this feature is really useful to managers/supervisors or administrators.

> **NOTE:** Your password can only be changed once a day, and you must already be logged in to the LMS.

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.

Proxy: 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. This link will only show up if you have been designated as a proxy for another LMS user.

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

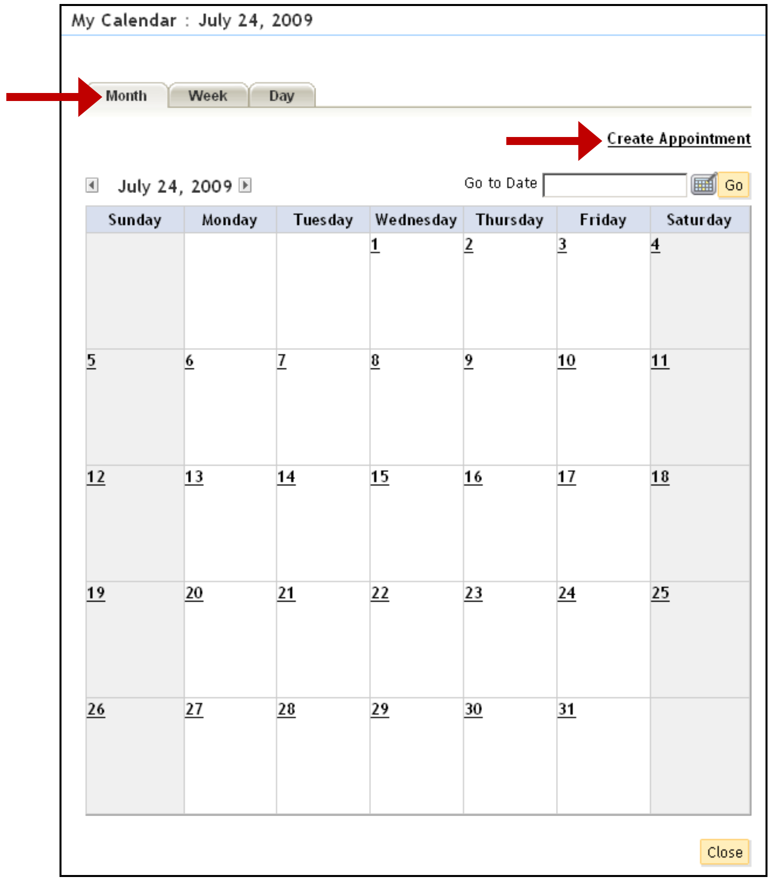
STEP-BY-STEP (ACCESS THE LMS CALENDAR)

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

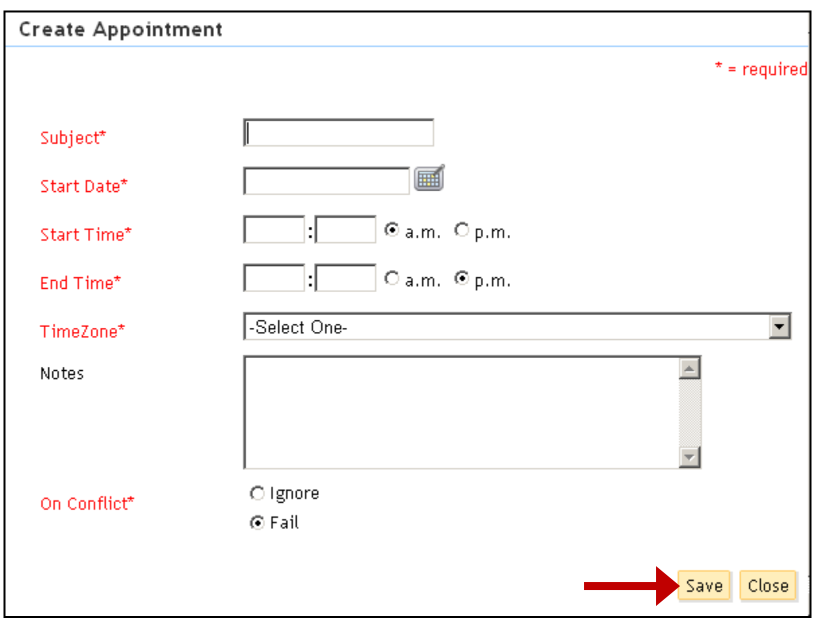
1. Log in to the LMS.
2. Click on **Calendar** on the top menu bar. Please note the tabs for **Month**, **Week**, and **Day**.

> **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**.



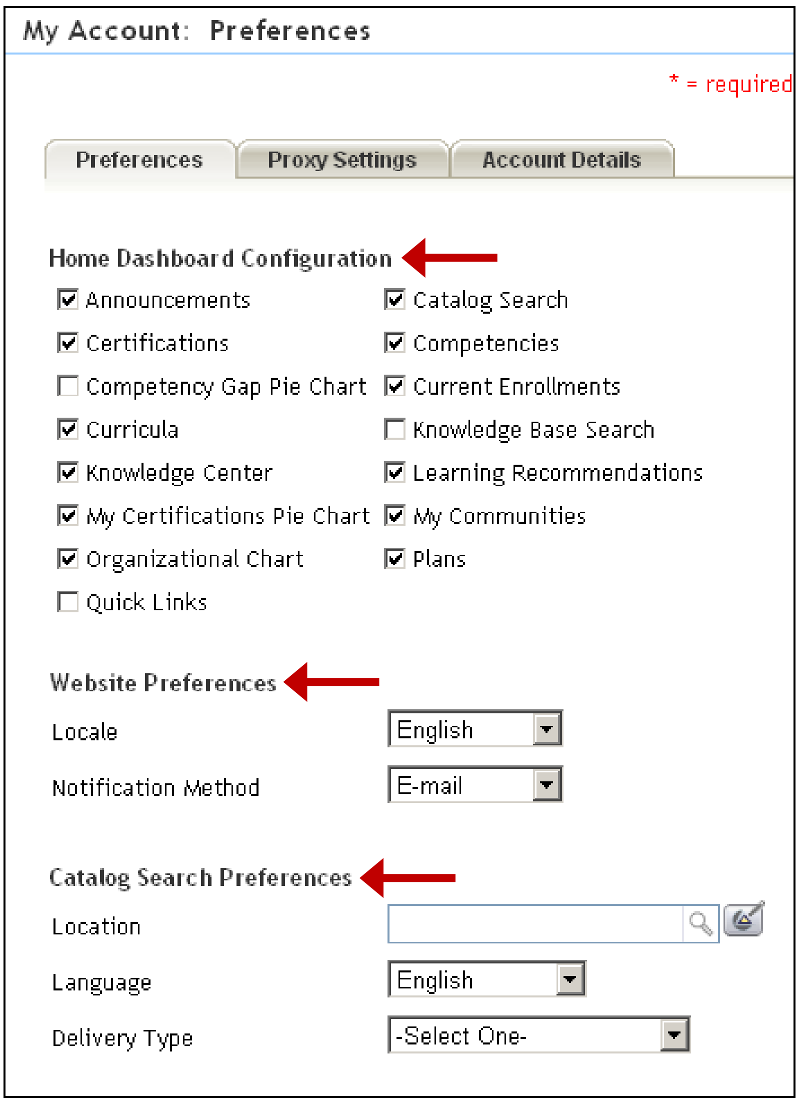
IMPORTANT: All fields in red with an asterisk (*) require data in order to save changes.

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.

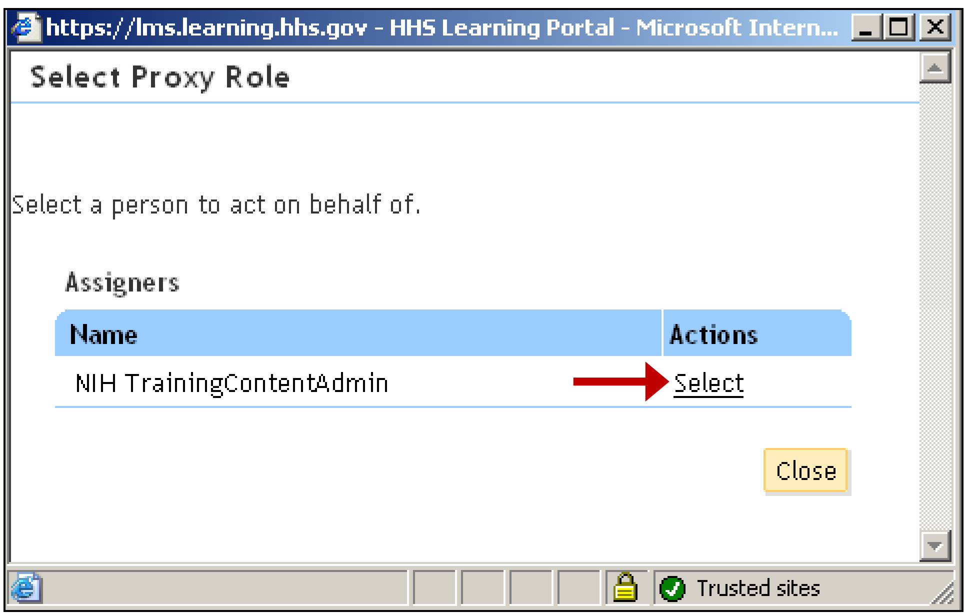


6. The following areas are not currently being used at NIH: **Auto-save Reviews Preference**, **Instant Messenger Information**, and **Table Row Display Preferences**. You should not alter the default settings without valid reason.
7. Click **Save**.

STEP-BY-STEP (ACCESS SOMEONE ELSE'S ROLE AS A PROXY)

The proxy feature may be used if an LMS user is going to be away for an extended time, and someone else must take care of tasks he/she is responsible for in the LMS. As a Learner, there should be no need to designate a proxy for yourself. However, someone else may designate you as a proxy. You would then be able to log in to the LMS and use his/her permissions to take actions he/she would normally take. The Proxy function should be used cautiously.

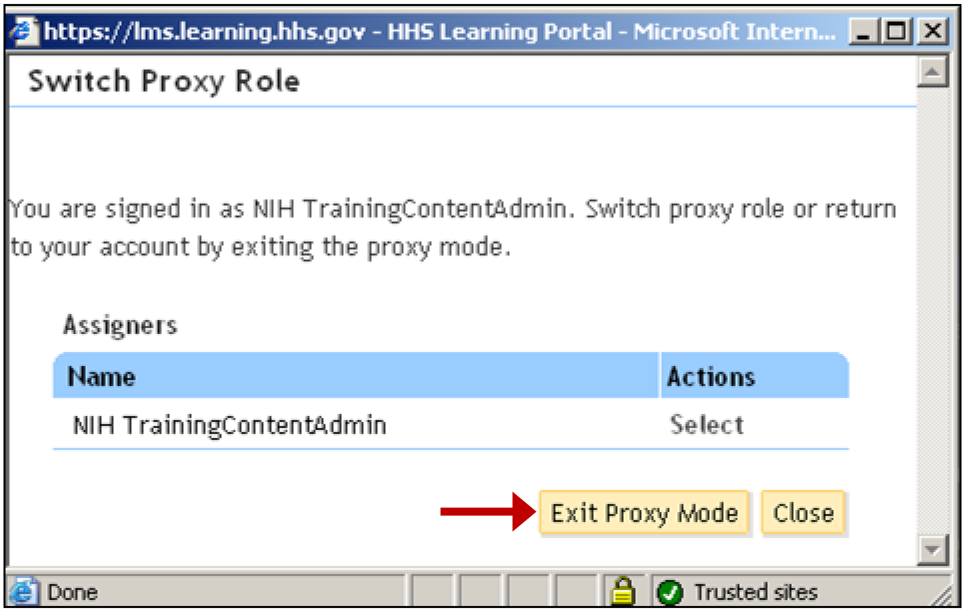
1. Click **Proxy** on the Home Page menu bar. (You will not see this link if you have not been designated as another person's proxy in the LMS.)
2. People for whom you have been designated as a proxy will appear on your list.
3. Click **Select** next to a person's name to change your role to that of the person listed.



4. Notice that the Welcome message in the blue menu bar has changed to indicate that you are acting as a proxy.

IMPORTANT: Be VERY cautious using this role. You and your proxy are both responsible for actions you take in the LMS.

5. Turn off your proxy role before resuming any LMS tasks for yourself as a Learner. Select the **Proxy** link again.
6. Select **Exit Proxy Mode** and make sure the Welcome message in the blue bar has returned to your name only.



STEP-BY-STEP (CHANGE YOUR PASSWORD)

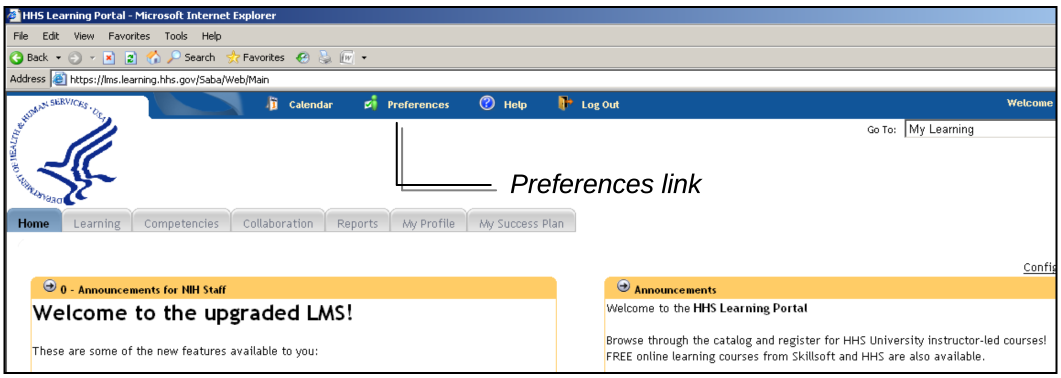
The following steps are only necessary if you know your current password, but would like to establish a new one.

1. Log in to the LMS.

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

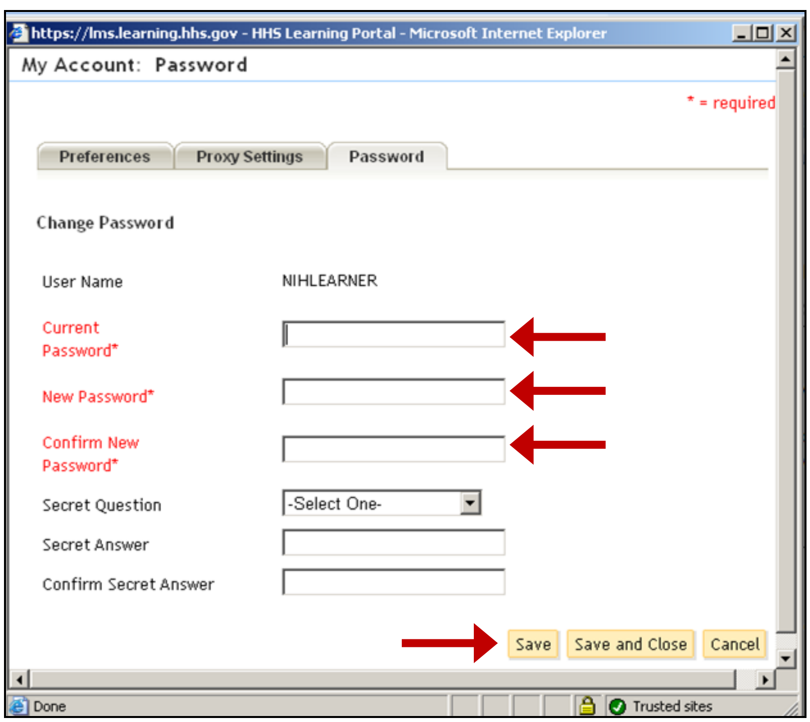
2. From the top of any page within the LMS, click the **Preferences** link on the top menu bar to open the **My Account: Preferences** window.

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



3. Select the **Password** tab.

4. In the **Current Password** field, enter the password you currently use to log in to the LMS.



5. In the **New Password** field, enter the new password you want to use in the future. Be sure your new password is in line with the following new password requirements:

New Password Requirements

- Must be a minimum of 8 characters in length.
- Must contain at least one upper-case character and one lower-case character.
- Must not include any part of your login ID or name.
- Must contain a minimum of 2 alphabetic characters.
- Must contain a minimum of 1 numeric character.
- Must contain a minimum of 1 special character.
  : # $ % ^ & * , _ ? / ; : \ |
- Cannot be changed more than once every 24 hours
- Cannot be one of your 5 previous passwords

6. In the **Confirm New Password** field, re-type the new password exactly as you typed it in Step 5.

   NOTE: If the confirmed new password in Step 6 is typed differently than it was in Step5, then the following error message displays when attempting to save: "The new password must be typed the same way when confirmed. Please try again."

7. If you do not want to create a secret question, click **Save and Close**. Otherwise, continue to step 8.

OPTIONAL: ENTER A SECRET QUESTION

The secret question is an optional layer of added security to restrict unauthorized access to your LMS password through the Password Reset tool. Although the setup of a secret question is NOT required, it is encouraged. If you choose to select a secret question and answer, this information will be required for you to successfully use the "Forgot Your Password?" feature later.

8. Select a **Secret Question** from the drop-down list.

9. In the **Secret Answer** field, type the answer to the secret question you selected in Step 8.

10. In the **Confirm Secret Answer** field, re-type the secret answer exactly as you typed it in Step 9.

    NOTE: If the confirmed secret answer in Step 10 is typed differently than it was in Step 9, the following error message displays when attempting to save: "The new secret answer must be typed the same way when confirmed. Try again."

11. Click **Save and Close**.

STEP-BY-STEP (ACCESS ONLINE HELP)

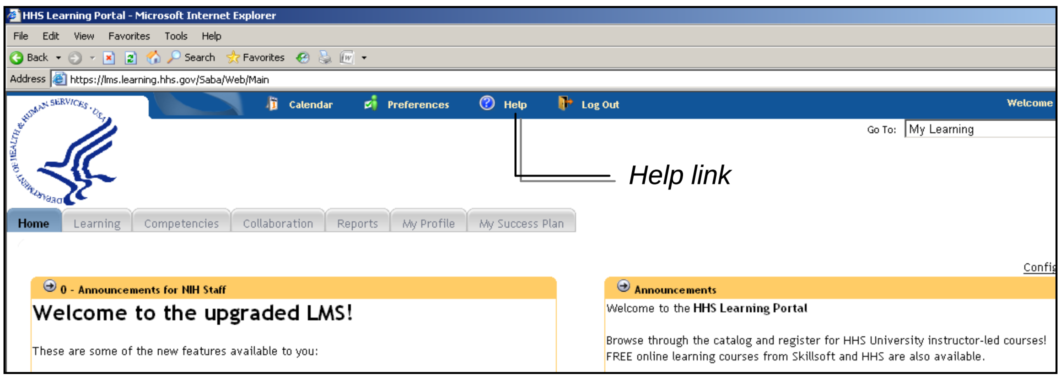
The **Help** section offers more information about how to use the system interface and provides a high-level discussion of the business processes and individual tasks that can be performed.

1. Log in to the LMS.

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

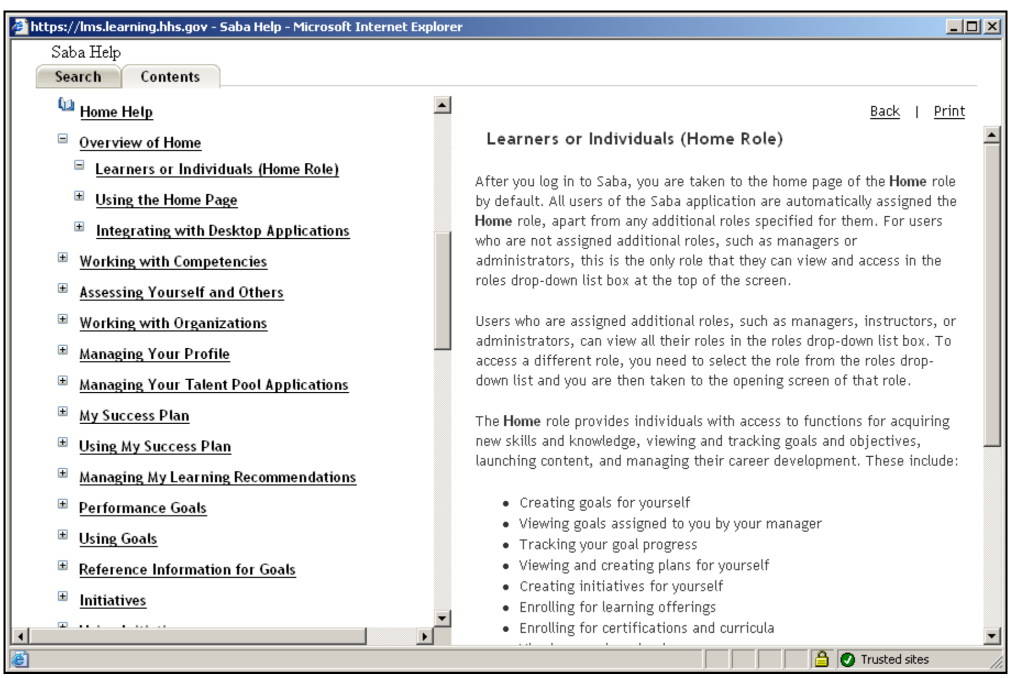
2. From the top of any page within the LMS, click **Help** on the top menu bar.

   NOTE: Make sure your web browser does not block pop-up windows.



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

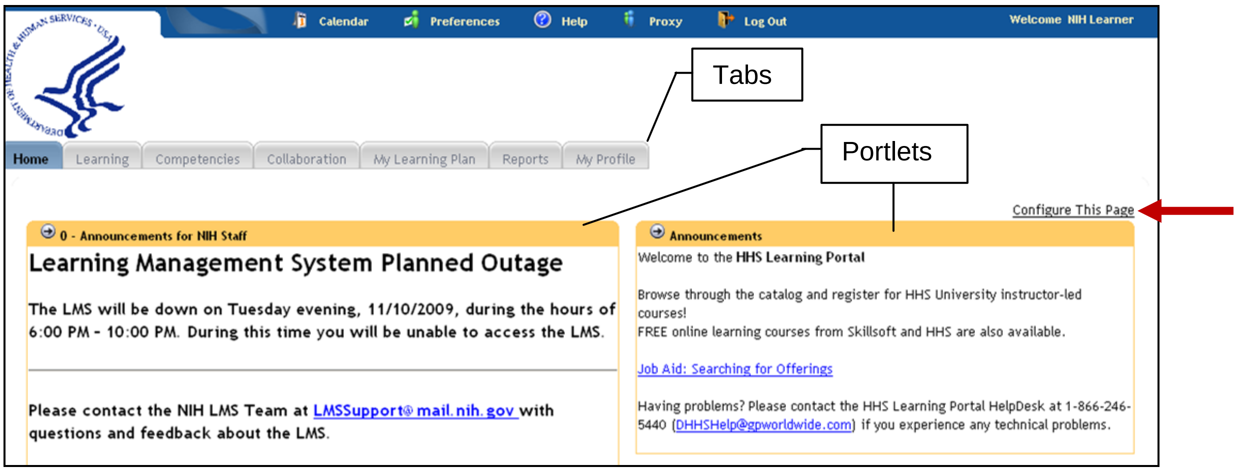
4. Use the **Contents** tab to browse the complete list of help topics available to you. Help content will appear on the right side of the **Help** window.



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 My Learning 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

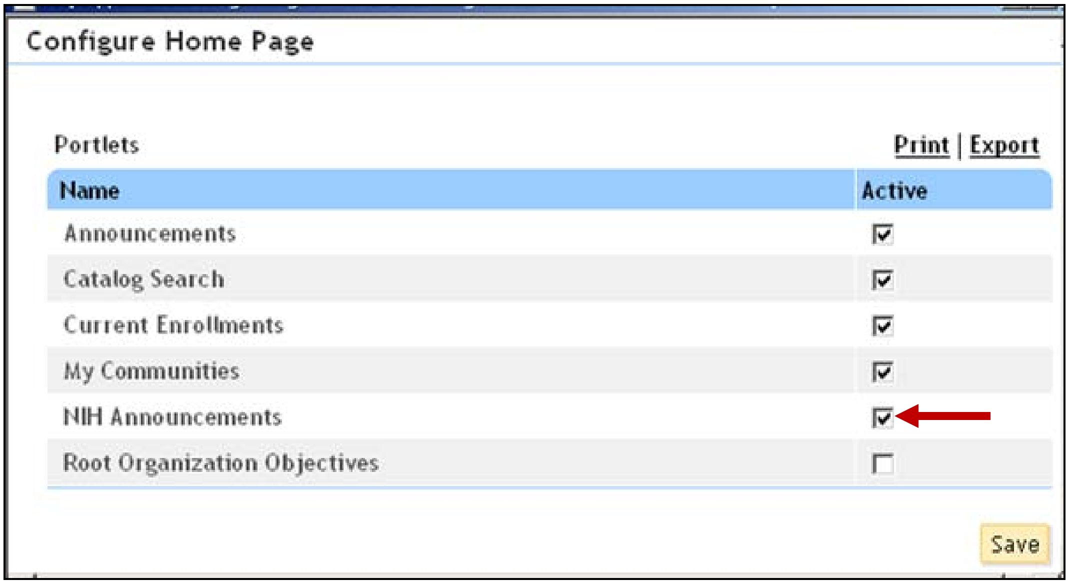
Near the top of the screen, just under the HHS logo, you will see seven tabs: **Home**, **Learning**, **Competencies**, **Collaboration**, **My Learning Plan**, **Reports**, and **My Profile**. These all lead to various areas of functionality in the LMS that will be discussed in more detail later in 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 yellow header bar, dragging, and dropping them into a new position.

MANAGING YOUR LEARNING (THE LEARNING TAB)

Under the **Learning** tab, the learner can access:

- **Enrollments** – Manage courses for which you have an active registration.
- **Transcript** – View your training history.
- **Catalog** – Access a list of all the learning items available to you in the LMS.
- **Certifications** – Manage your certifications.
- **Continuing Education** – Manage continuing education credits.
- **Order History** – Access orders (registrations) you have placed for LMS training items.
- **Knowledge Center** – Access informational documents available in the LMS.
- **Learning Requests** – Submit requests or view your request history.
- **Learner Administration** – Access enrollments, curricula, certifications, or transcript.
- **Evaluations & Surveys** – Access evaluations and surveys assigned to you.

ENROLLMENTS

Your **Enrollments** area lists courses you are registered for but have not yet completed. Click the title of any course in your enrollments list to find more information about it. Online courses can be re-launched and finished from the enrollments area. When you complete an online course, it should mark complete automatically and disappear from your enrollments (moves to your transcript). Classroom courses must be closed out by an administrator before they will move from your enrollments to your transcript.

In addition to the launch and drop functions explained in detail below, you may also see **View Progress** and/or **View Recommendations** under the **Actions** column. **View Progress** may allow you to see more detailed information about your progress through a course – especially an online course. View Recommendations may list similar courses that you may choose to bookmark or ignore.

Click **Current Enrollments** under the **Enrollments** menu to return to the **My Enrollments** screen at any time.

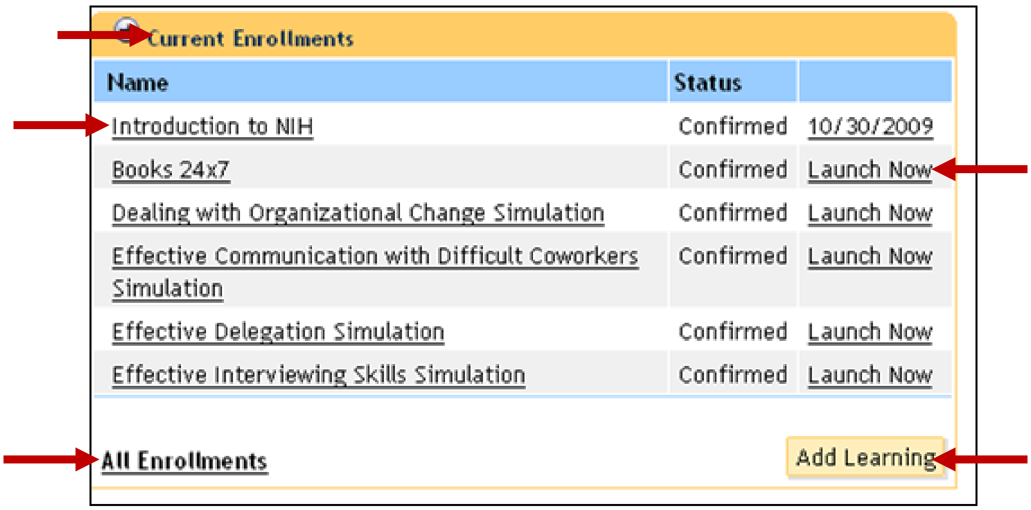
The **Catalogued Enrollments** tab includes all learning items that reside in the HHS Learning Portal. The **External Enrollments** tab is not in use at this time, but will eventually list training through outside (not in the HHS Learning Portal) organizations that have been approved and paid for through the LMS.

STEP-BY-STEP (USE THE CURRENT ENROLLMENTS PORTLET)

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. Locate the **Current Enrollments** portlet in your home dashboard.



3. You may …

   a. Click the title of an enrollment to access more details about the offering;

   b. Access the content of an online course using **Launch Now**;

   c. Go directly to the catalog search area using Add Learning;

   d. Go the My Enrollments by clicking either All Enrollments or the portlet title.

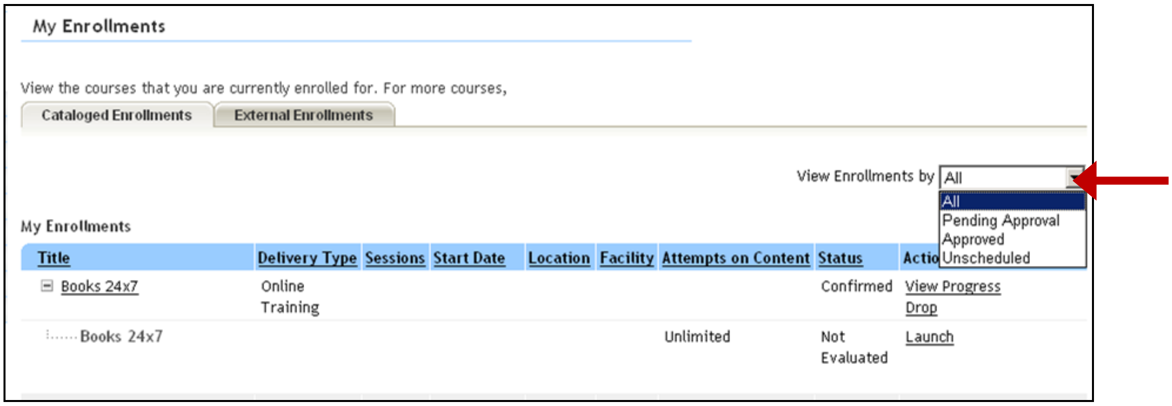
STEP-BY-STEP (VIEW ENROLLMENTS)

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. Click on the **Learning** tab. **My Enrollments** is the default screen. You will see a list of all courses (online and/or classroom) for which you are currently registered.

3. You may view your enrollments by **All**, **Pending Approval**, **Approved**, or **Unscheduled** using the **View Enrollments** drop-down menu.



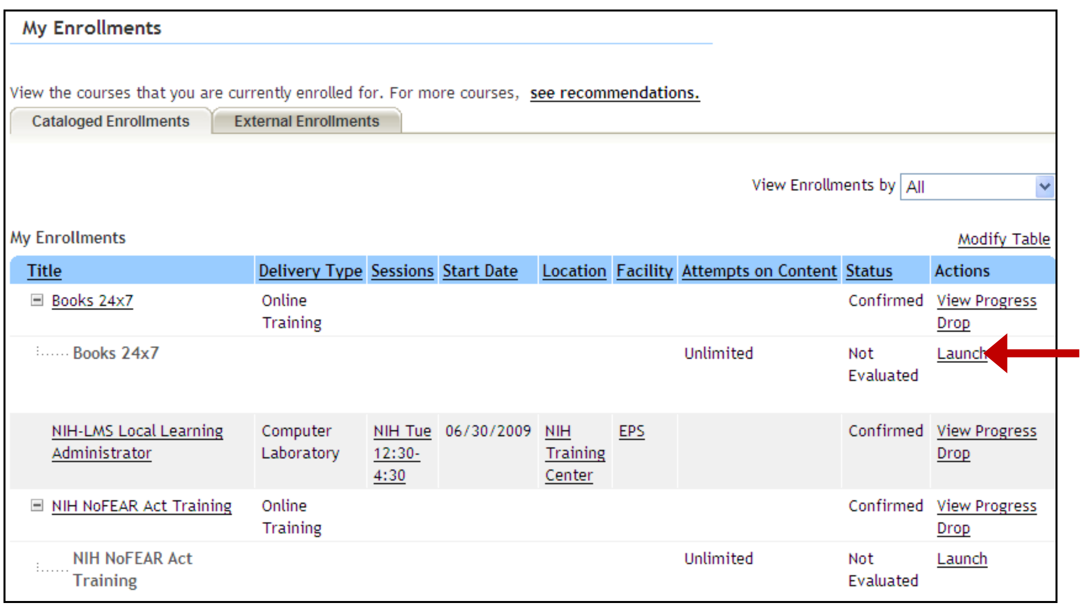
STEP-BY-STEP (LAUNCH AN ONLINE COURSE FROM YOUR ENROLLMENTS)

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. Click on the **Learning** tab. **My Enrollments** is the default screen.

3. Next to all online courses, you should see **Launch** listed under the **Actions** column; click **Launch** to start the course.



4. 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.

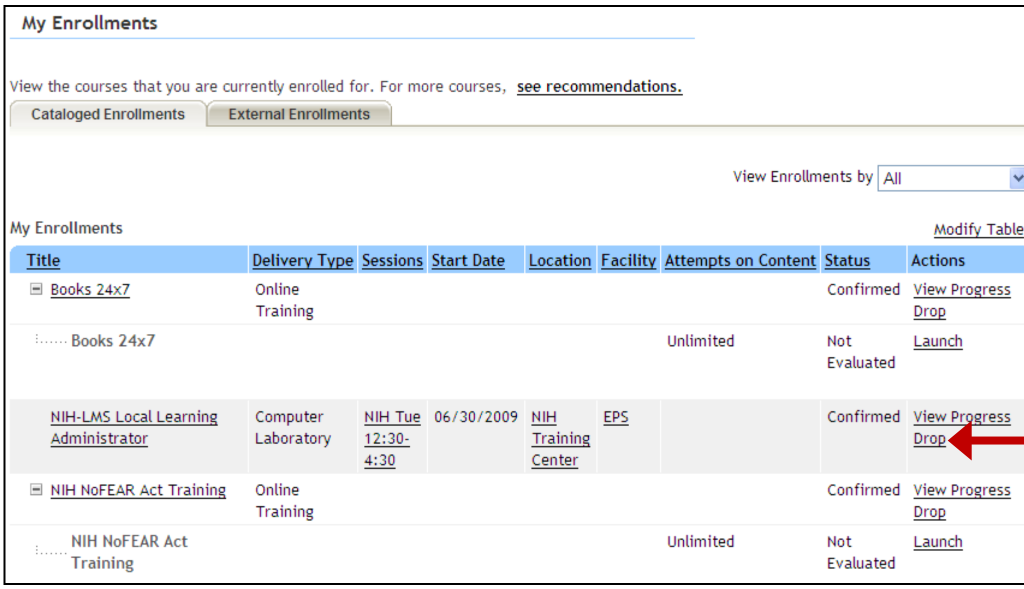
STEP-BY-STEP (DROP AN ENROLLMENT)

1. Log in to the LMS.

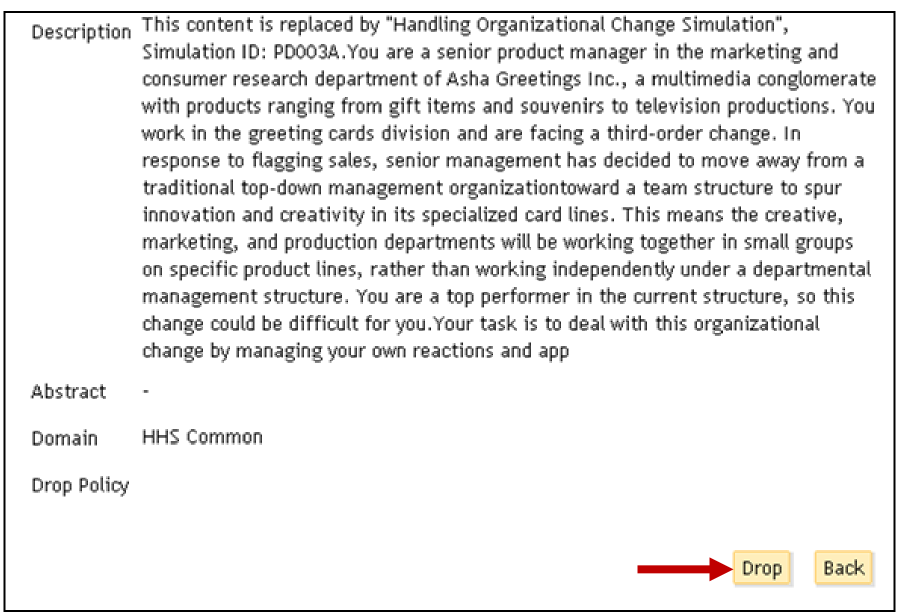
   NOTE: For instruction about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **Learning** tab. **My Enrollments** is the default screen.

3. Under the **Actions** column, click on **Drop** next to the appropriate offering to cancel your enrollment for that offering.



4. You will see a screen allowing you to check the details of the offering you chose to drop. If you are sure you want to drop the offering, scroll to the bottom of the screen and click **Drop**.



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.

5. You will be returned to **My Enrollments**, and the offering you dropped will no longer appear in your list.

LEARNING APPROVAL

The **Learning Approval** area under the **Enrollments** menu is where you would approve a request for training if you are in the approval chain for another learner. This functionality is not being used at this time, but will become more relevant at a later date when payment for training is processed through the LMS.

Like **My Enrollments**, this area is separated in to **Cataloged Learning** (item is administered through the HHS Learning Portal) and **External Learning** (item is not administered through the HHS Learning Portal) tabs.

TRANSCRIPT

The **My Transcript** area provides a record of training that you have taken.

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.

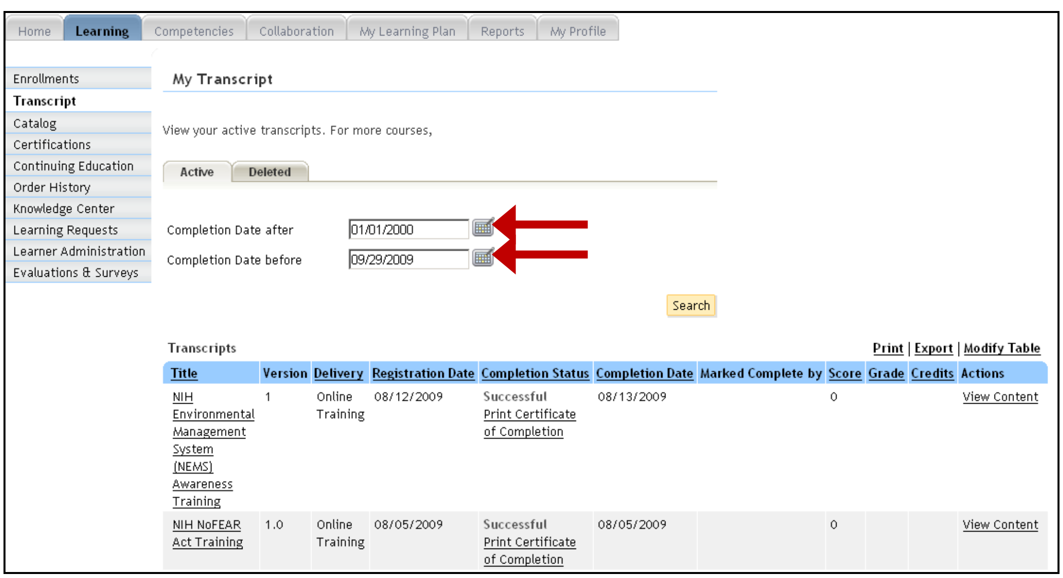
> **IMPORTANT:** NIH has not yet migrated all training history to the LMS. Your LMS transcript will only include those training items that are managed or recorded in the system. Training histories from NIHTC's NIHITS and CIT's Remedy are recorded in the LMS biweekly. Some training – such as NIH Ethics – 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, email LMSSupport@mail.nih.gov to ask.

STEP-BY-STEP (VIEW TRANSCRIPT)

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. Click on the **Learning** tab.
3. Click on **Transcript** from the menu item on the left-hand sidebar. You will see the **My Transcript** screen and a list of training items you have completed. The **Active** tab is the default view.
4. The date range of the transcript items viewed defaults to the past three months. If you want to view items from before that, adjust the **Completion Date after** and **Completion Date before** dates appropriately.
5. Click **Search**.



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

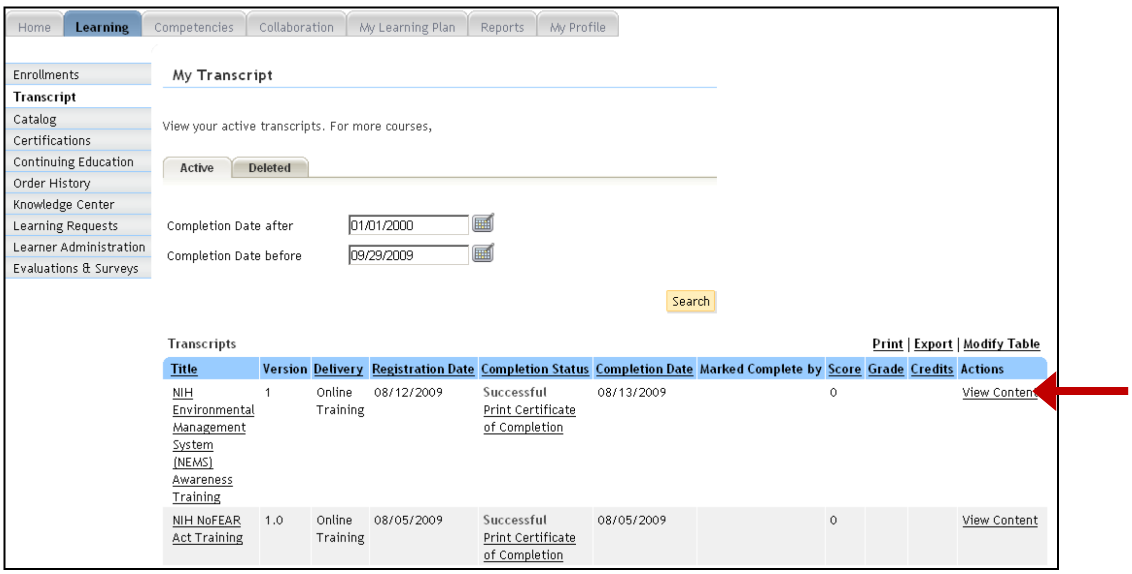
STEP-BY-STEP (REVIEW A COMPLETED ONLINE COURSE FROM TRANSCRIPT)

The content from an online course you have completed may be reviewed from your transcript.

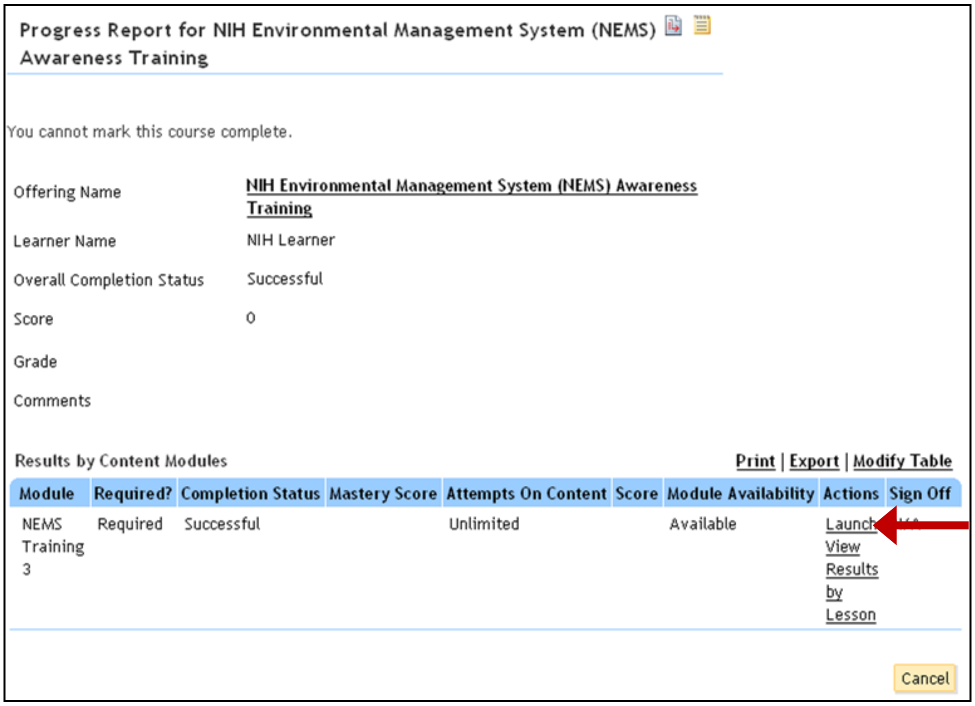
1. Log in to the LMS.

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

2. Click on the **Learning** tab.
3. Click on **Transcript** from the menu item on the left-hand sidebar.
4. Locate the course you want to review, and click **View Content**.



5. You will see a **Progress Report** screen for the selected course. Click **Launch** 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)

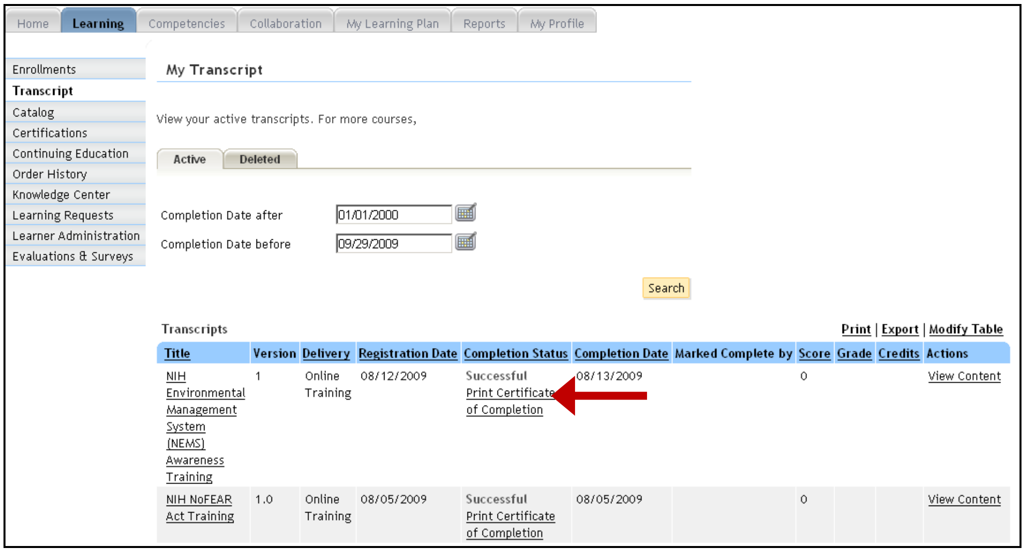
The following steps will allow you to print out a certificate of completion for a training course that you have finished.

1. Log in to the LMS.

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

2. Click on the **Learning** tab.
3. Click on **Transcript** from the menu item on the left-hand sidebar.

4. Locate the course for which you want to print a completion certificate, and click **Print Certificate of Completion**.

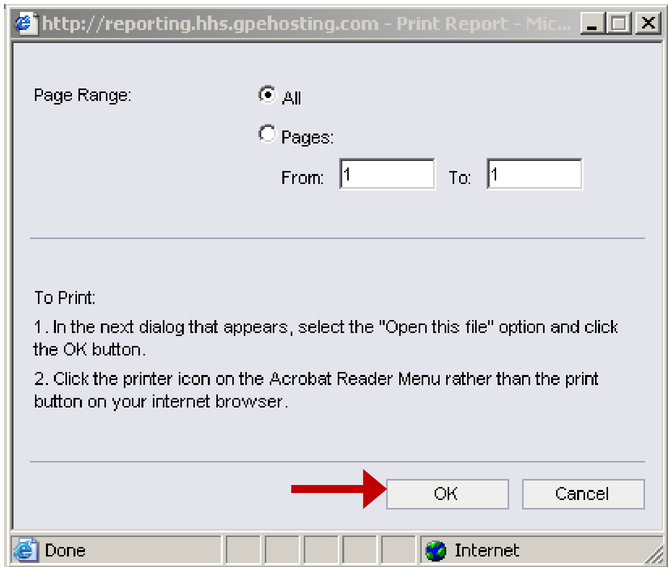


5. The certificate will open in a pop-up window.

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

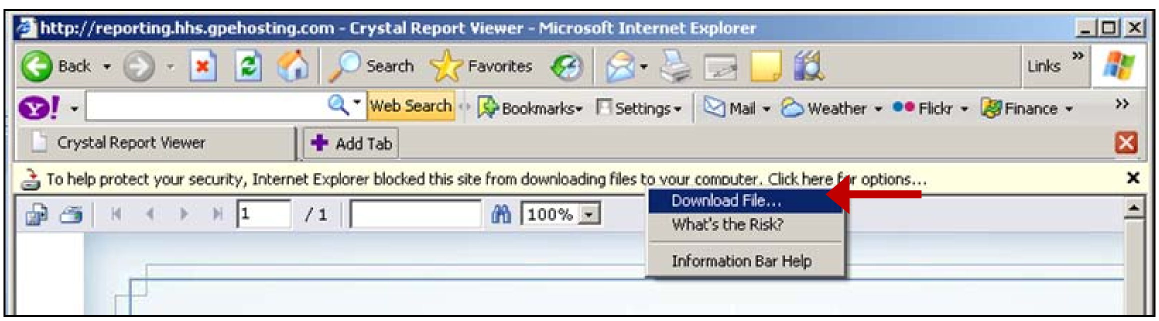
6. Click on the print icon in the upper left corner of the certificate.

7. On the next dialog box, click **OK** to print all pages.



8. 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.



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

10. 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)

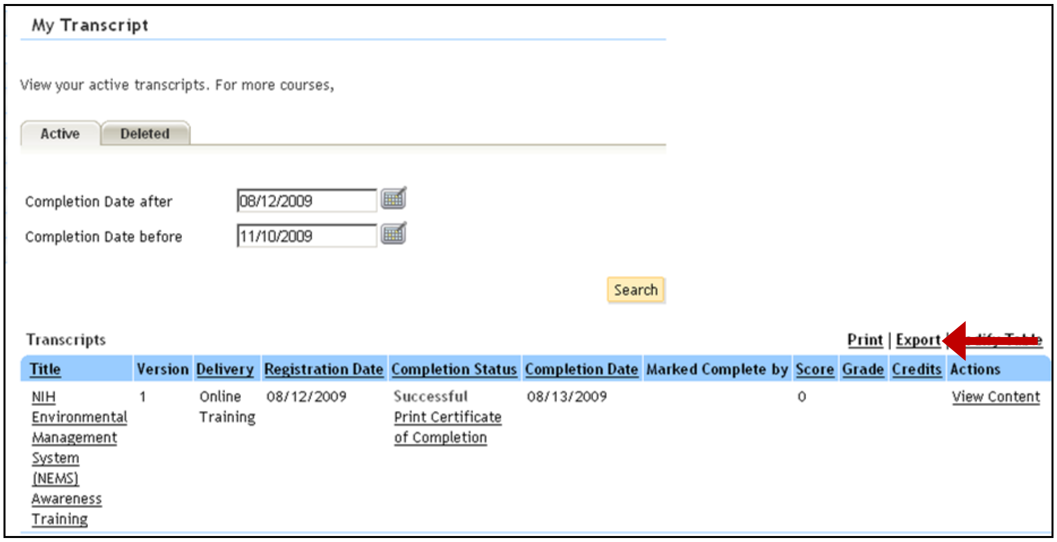
The following steps will allow you to export your transcript to a Microsoft ® Excel spreadsheet.

1. Log in to the LMS.

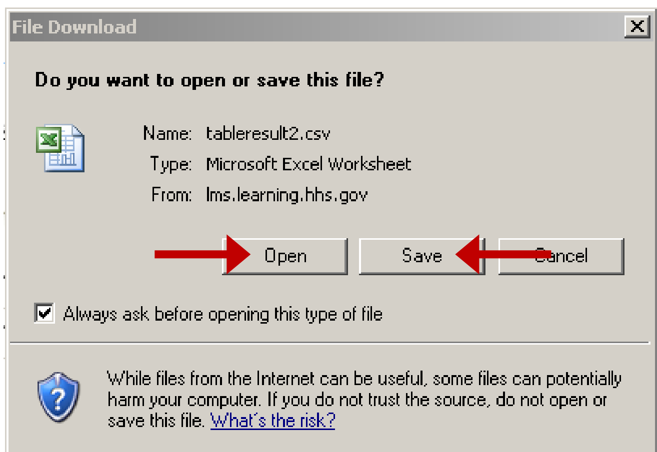
   NOTE: For instruction about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **Learning** tab.
3. Click on **Transcript** from the menu item on the left-hand sidebar.

4. Click **Export**.



5. When the **File Download** dialog box appears, click **Save** or **Open** as desired.



CATALOG

The **Learning Catalog** area allows you to search for training items in the LMS. **Browse by Category** is the default when you click on the Catalog menu item on the left-hand sidebar under the **Learning** tab. Learning items may also be found through **Simple Search** or **Advanced Search**.

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

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. Locate the **Catalog Search** portlet in your home dashboard.

3. You may …

   a. 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 **Go**;

      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.

   b. Go directly to the **Advanced Search** function;

   c. Go directly to **Browse by Category**;

   d. Go directly to simple search by clicking the title of the portlet.

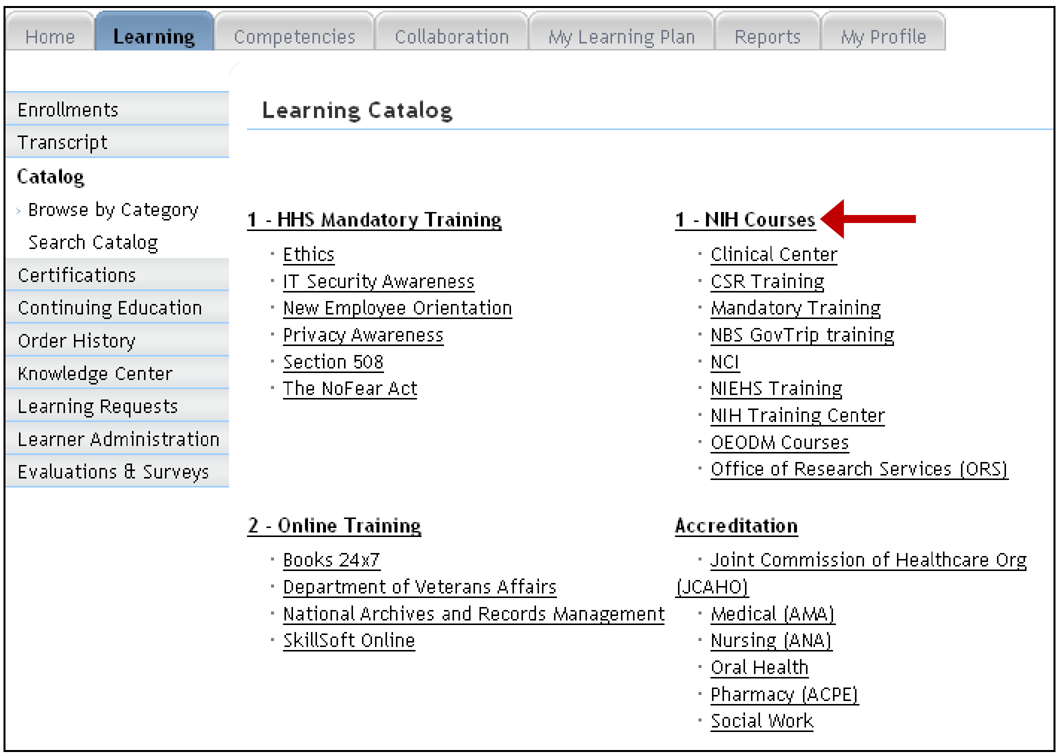
STEP-BY-STEP (REGISTER FOR TRAINING USING BROWSE BY CATEGORY)

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.

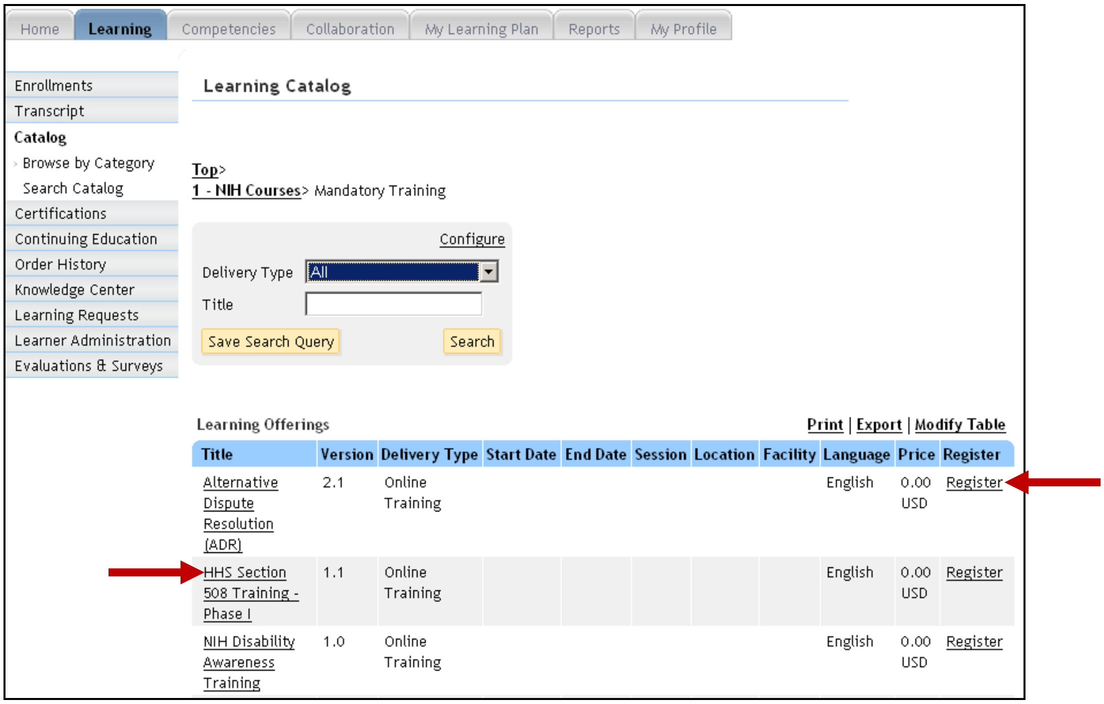
1. Log in to the LMS.

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

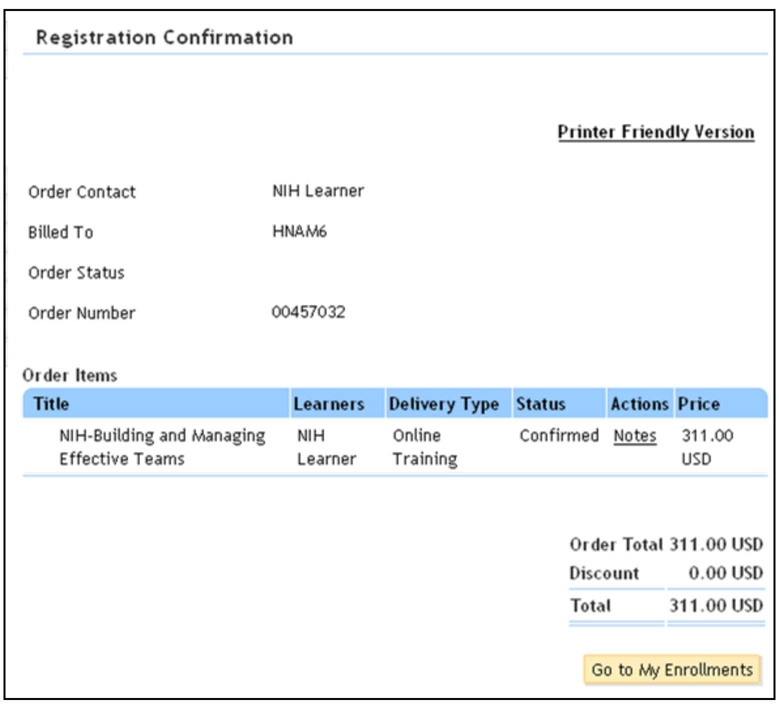
2. Click on the **Learning** tab.
3. Click on **Catalog** from the menu item on the left-hand sidebar. **Browse by Category** is the default view.
4. Note the category **1 - NIH Courses** with several sub-categories.



5. Click any category to see a list of offerings available to you.



6. Click the title of an offering to view more details. Click **Register** to register for the offering.
7. On the **Registration Confirmation** screen, pay careful attention to any tuition fees, notes, and other details.



IMPORTANT: If the course has tuition due, you must submit a NIHITS nomination for payment to secure your seat in the class. No payment information is being transmitted through the LMS at this time.

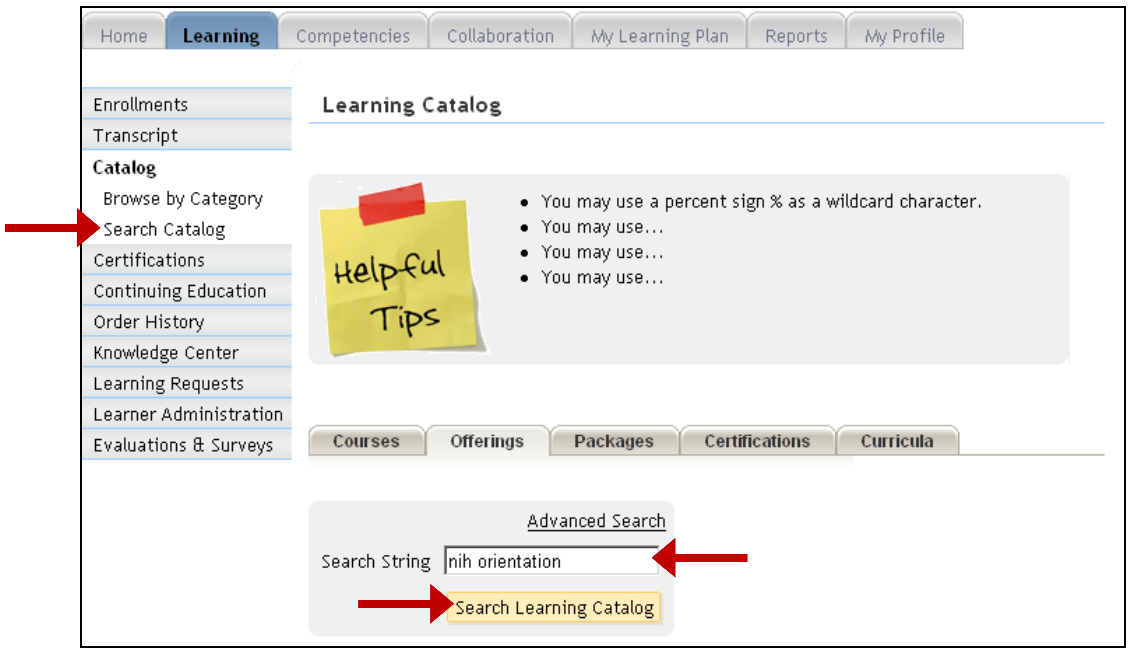
STEP-BY-STEP (REGISTER FOR TRAINING USING SIMPLE SEARCH)

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

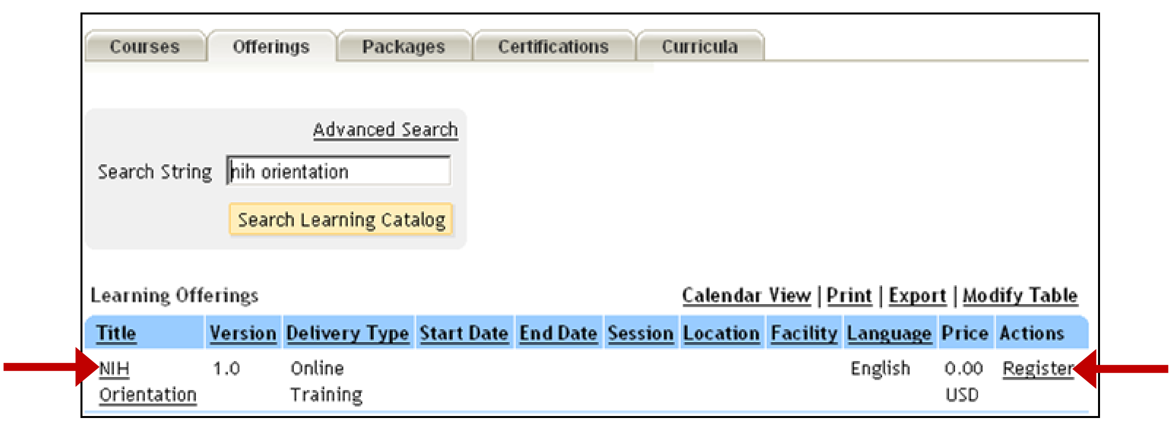
1. Log in to the LMS.

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

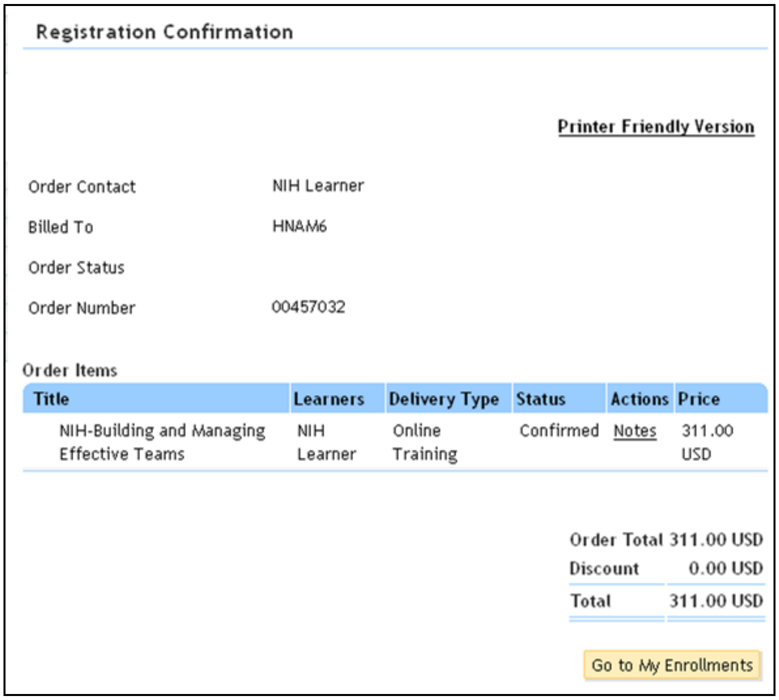
2. Click on the **Learning** tab.
3. Click **Catalog**, then **Search Catalog** from the menu items on the left-hand sidebar.
4. Enter the search criteria you are looking for in the **Search String** and click **Search Learning Catalog**.



5. A list of offerings matching your criteria is returned.
6. Click the title of an offering to view more details. Click **Register** to register for the offering.



7. On the **Registration Confirmation** screen, pay careful attention to any tuition fees, notes, and other details.



IMPORTANT: If the course has tuition due, you must submit a NIHITS nomination for payment to secure your seat in the class. No payment information is being transmitted through the LMS at this time.

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

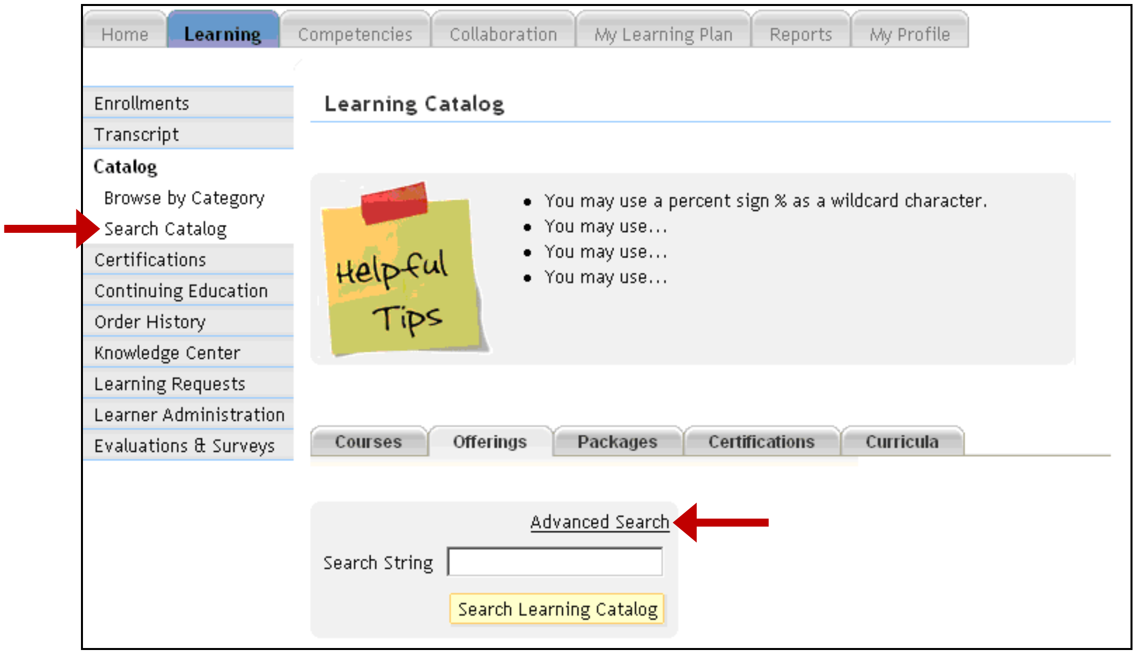
Use the Advanced Search option if you are having trouble finding what you are looking for. Be careful not to enter too much specific criteria, thereby making your search too narrow.

1. Log in to the LMS.

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

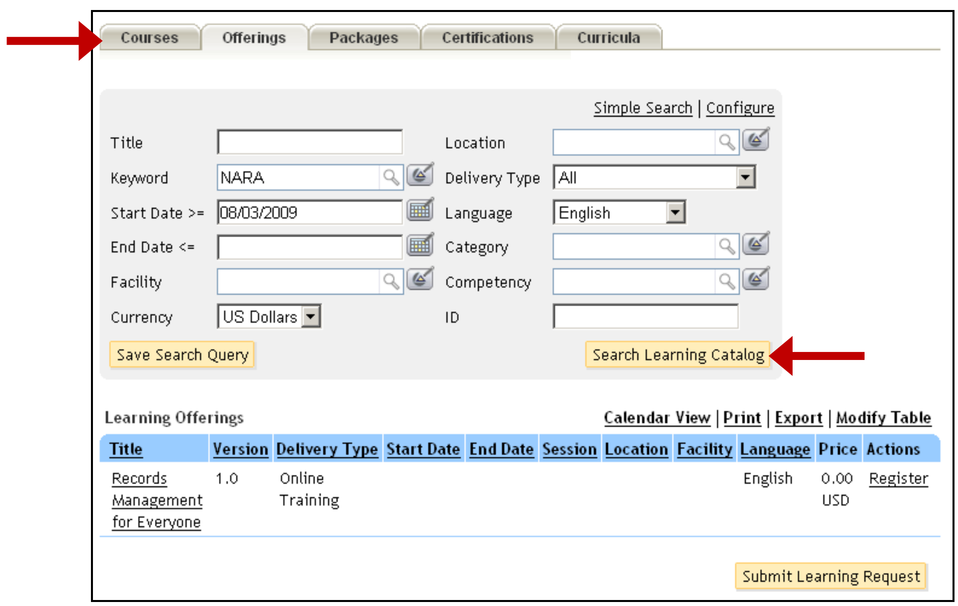
2. Click on the **Learning** tab.
3. Click on **Catalog**, then **Search Catalog** from the menu items on the left-hand sidebar.

4. Click on the **Advanced Search** link.



5. Notice that you have many more options by which to search for training, including separate search tabs for **Courses**, **Offerings**, **Packages**, **Certifications**, and **Curricula**. 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.

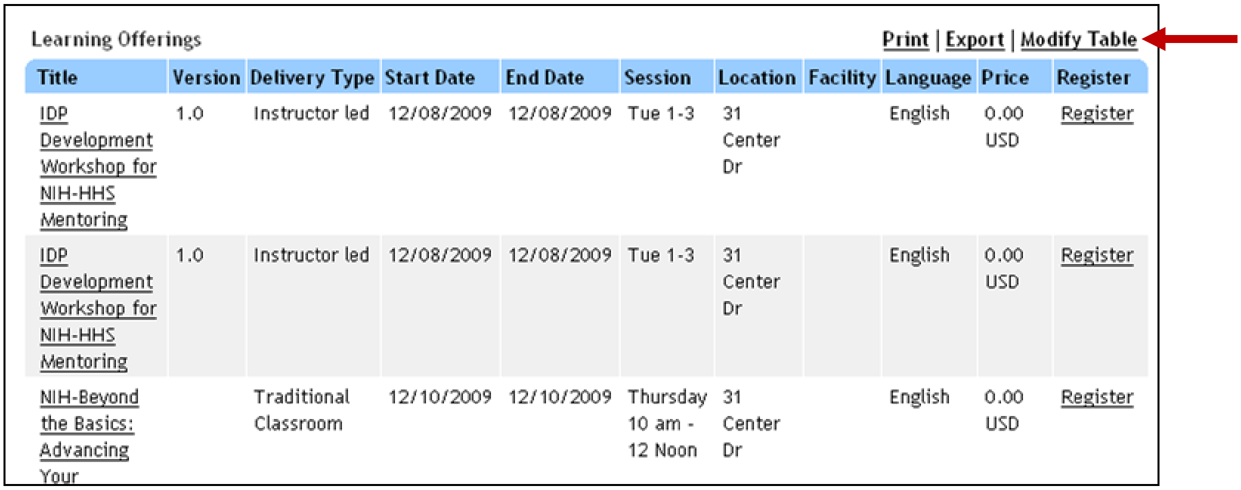


6. Click the title of an item to view more details. Use links available in the **Actions** column as appropriate.

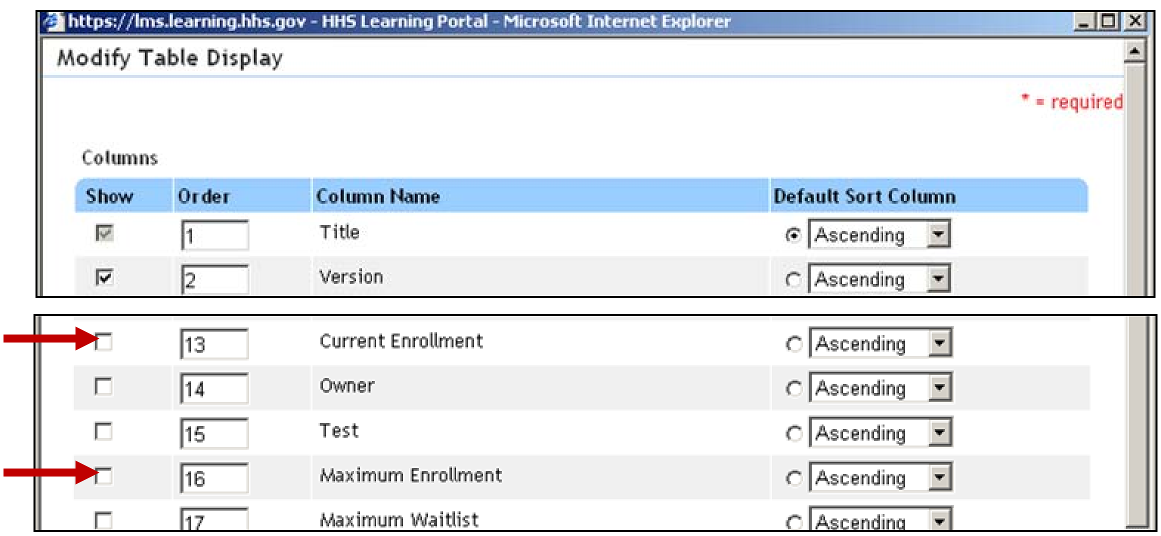
STEP-BY-STEP (VIEW SEATS AVAILABLE FOR AN OFFERING)

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 a search – browse by category, simple, or advanced.

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



2. The **Modify Table Display** pop-up window appears. Click on the check boxes in the Show column by **Current Enrollment** and **Maximum Enrollment**. Then click **Save** at the bottom of the screen.



3. You can now view the **Current Enrollment** and **Maximum Enrollment** columns. The difference between these values indicates how many seats are still available in the offering.

Learning Offerings — Calendar View | Print | Export | Modify Table

Title	Version	Delivery Type	Start Date	End Date	Session	Location	Facility	Language	Offering ID	Current Enrollment	Maximum Enrollment	Price	Actions
HPOCs - Open Houses for GovTrip wave 2		Traditional Classroom	10/27/2009	10/27/2009	Tue 9-12	6707 Democracy Blvd		English	00015256	9	15	0.00 USD	Register
HPOCs - Open Houses for GovTrip wave 2		Traditional Classroom	10/30/2009	10/30/2009	Fri 9-12	6707 Democracy Blvd		English	00015276	1	15	0.00 USD	Register
HPOCs - Open Houses for GovTrip wave 2		Traditional Classroom	10/28/2009	10/28/2009	Wed 1-4	6707 Democracy Blvd		English	00015275	1	15	0.00 USD	Register

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.

STEP-BY-STEP (SORT LEARNING OFFERINGS BY START DATE)

You may sort the list of Learning Offerings – or any list of items in the LMS - by any of the underlined column headings

1. Log in to the LMS.

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

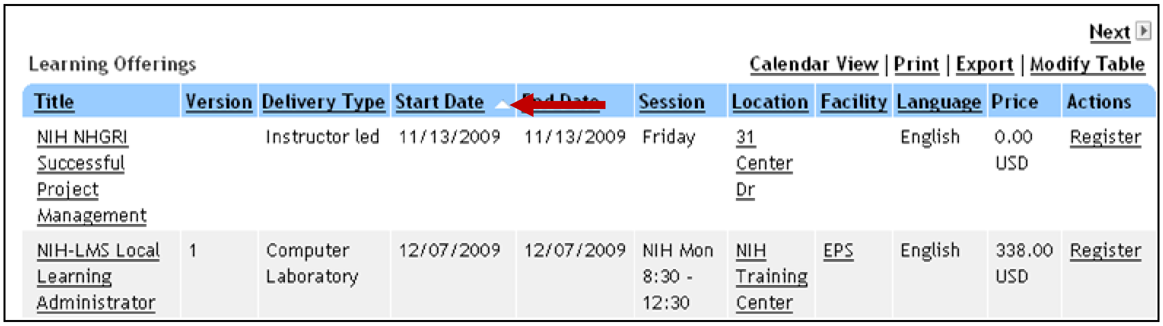
2. Click on the **Learning** tab.
3. Search for learning offerings you need by either using the **Browse by Category**, **Simple Search**, or **Advanced Search** functions. (See above.)
4. In order to view the offerings by the earliest start date, click on the **Start Date** link at the top of the start date column.

Learning Offerings — Calendar View | Print | Export | Modify Table

Title	Version	Delivery Type	Start Date	End Date	Session	Location	Facility	Language	Offering ID	Current Enrollment	Maximum Enrollment	Price	Actions
HPOCs - Open Houses for GovTrip wave 2		Traditional Classroom	10/27/2009	10/27/2009	Tue 9-12	6707 Democracy Blvd		English	00015256	9	15	0.00 USD	Register
HPOCs - Open Houses for GovTrip wave 2		Traditional Classroom	10/30/2009	10/30/2009	Fri 9-12	6707 Democracy Blvd		English	00015276	1	15	0.00 USD	Register
HPOCs - Open Houses for GovTrip wave 2		Traditional Classroom	10/28/2009	10/28/2009	Wed 1-4	6707 Democracy Blvd		English	00015275	1	15	0.00 USD	Register

Submit Learning Request

5. The **Learning Offerings** list will refresh, sorted by start date, earliest to latest, with online offerings last (no specific date). To change the sort order from latest to earliest, click the white arrow next to the column title.



Next

Learning Offerings

Calendar View | Print | Export | Modify Table

Title	Version	Delivery Type	Start Date	End Date	Session	Location	Facility	Language	Price	Actions
NIH NHGRI Successful Project Management		Instructor led	11/13/2009	11/13/2009	Friday	31 Center Dr		English	0.00 USD	Register
NIH-LMS Local Learning Administrator	1	Computer Laboratory	12/07/2009	12/07/2009	NIH Mon 8:30 - 12:30	NIH Training Center	EPS	English	338.00 USD	Register

NOTE: Follow similar steps for sorting the list by any of the columns with an underlined title.

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 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.

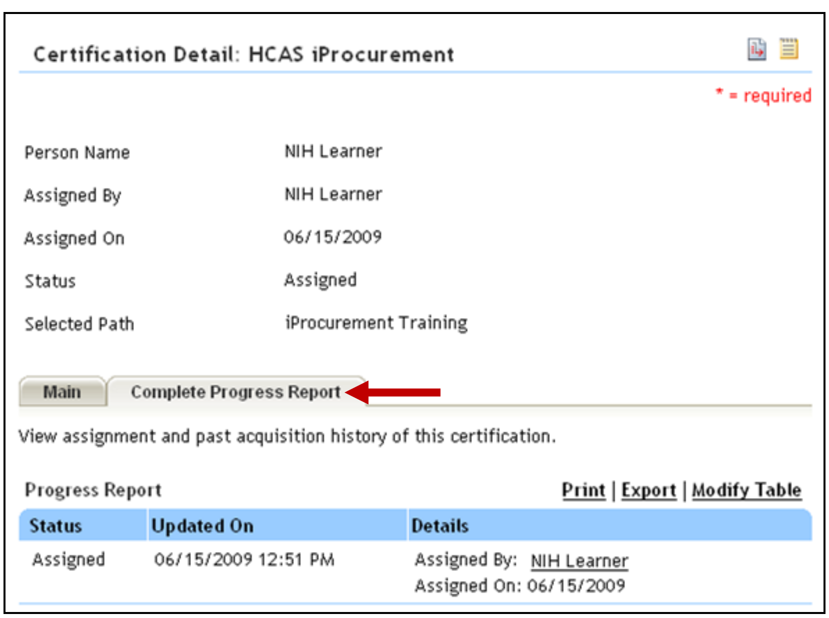
You may add external certifications to your LMS training record.

STEP-BY-STEP (VIEW AND MANAGE CERTIFICATIONS)

1. Log in to the LMS.

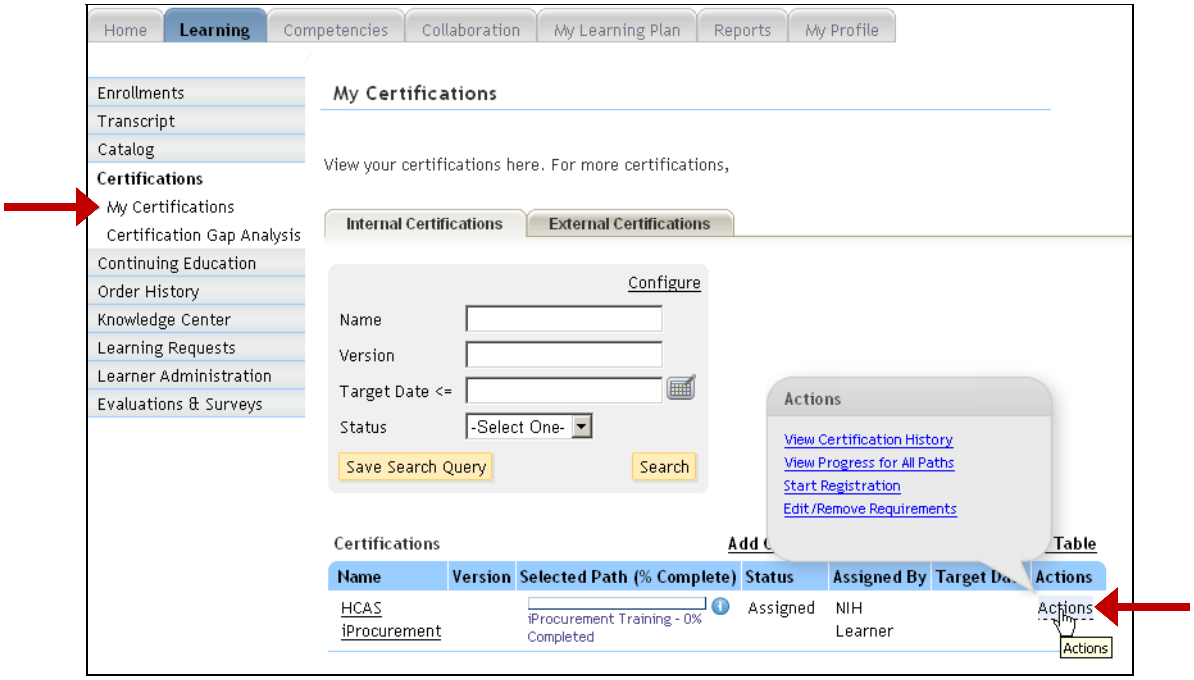
   NOTE: For instruction about logging on, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **Learning** tab.
3. Click on **Certifications** from the menu item on the left-hand sidebar. The **My Certifications** screen is the default. If you have been assigned certifications to complete, they will be listed here.
4. 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.



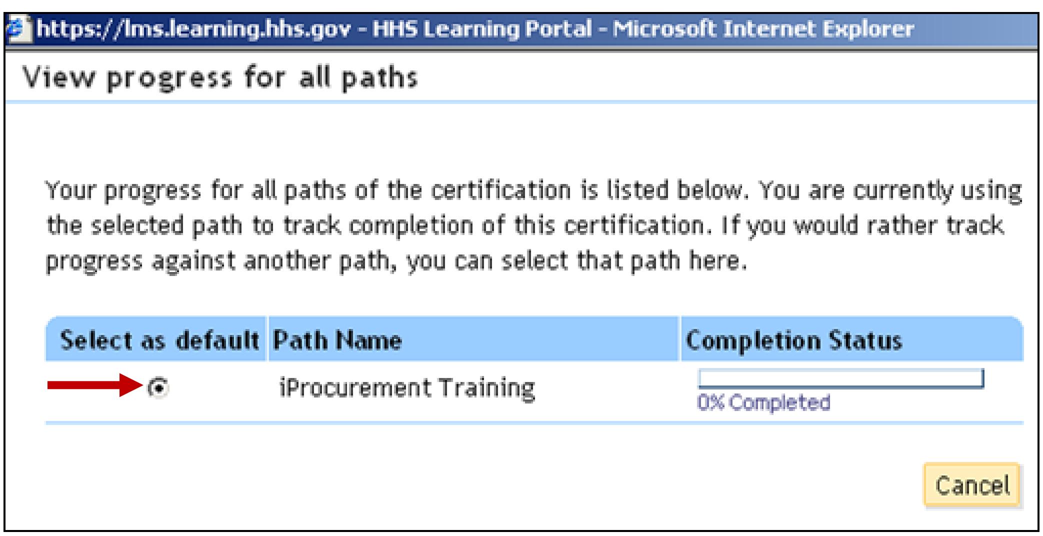
5. Click **Cancel** on the **Main** tab to return to **My Certifications**.

6. Under the **Actions** column you have options to **View Certification History**, **View Progress for All Paths**, **Start Registration**, or **Edit/Remove Requirements**. Hold your cursor over the **Actions** link next to the appropriate certification to see the **Actions** pop-up menu.

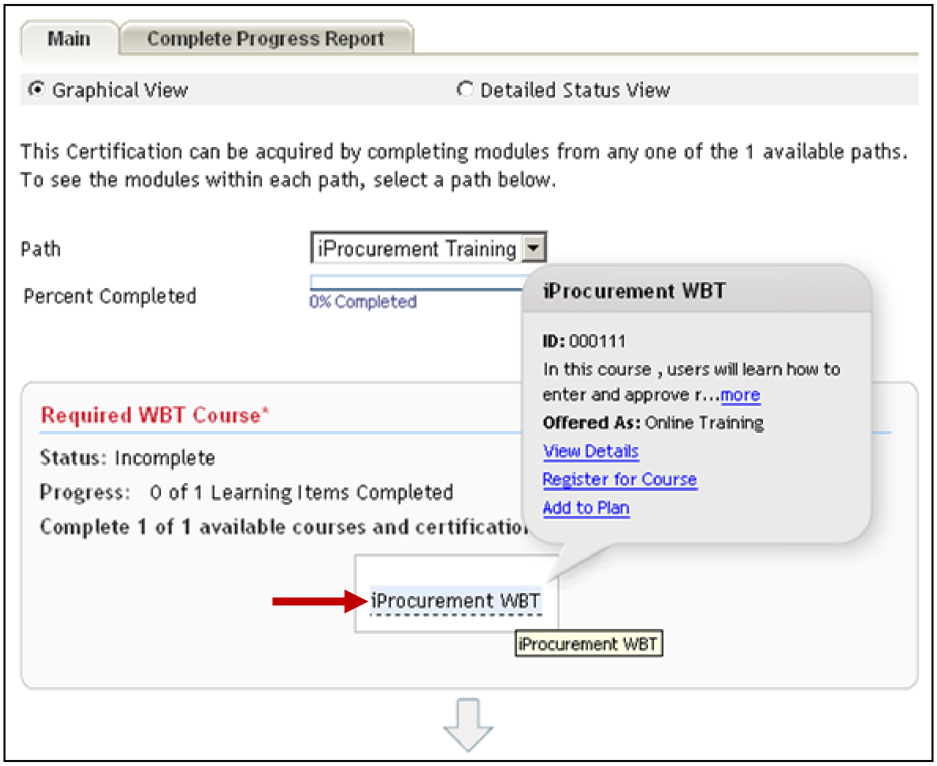


7. **View Certification History** takes you to the same **Complete Progress Report** mentioned in step 4 above.

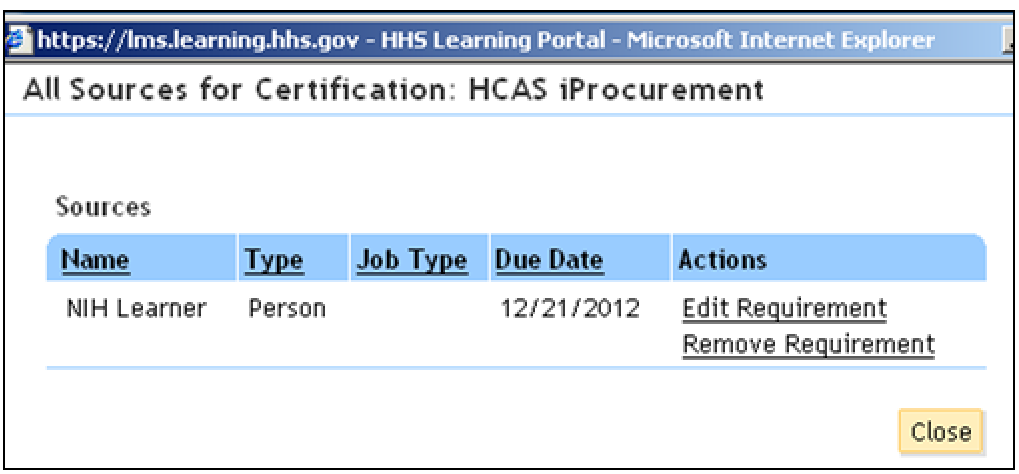
8. **View Progress for all Paths** gives you a pop-up window displaying the available paths through a certification and your progress for each. If more than one path is available through a certification and you wish to change your path, you could do that here.



9. **Start Registration** takes you to the **Main** tab mentioned in steps 4 and 5 above. From here, you may hold your cursor over the link provided in a course box to see a pop-up menu with options to **View Details** of the course, **Register for Course**, or **Add to Plan** (learning plans are discussed later).



10. **Edit/Remove Requirements** will allow you to change any details for the certification that an administrator allows you to change.



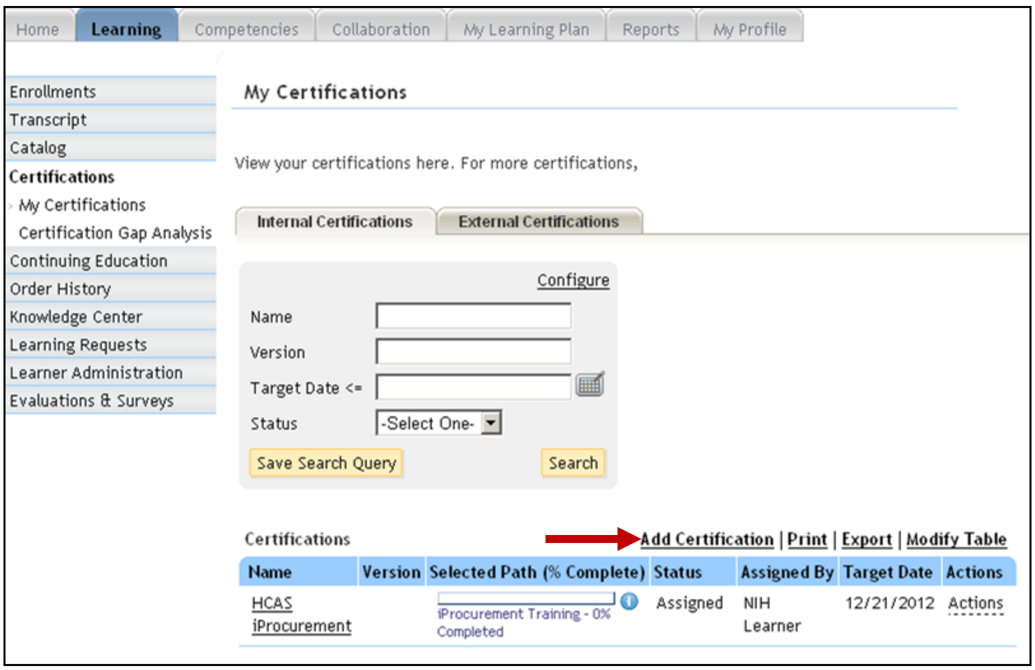
STEP-BY-STEP (ADD AN INTERNAL CERTIFICATION)

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.

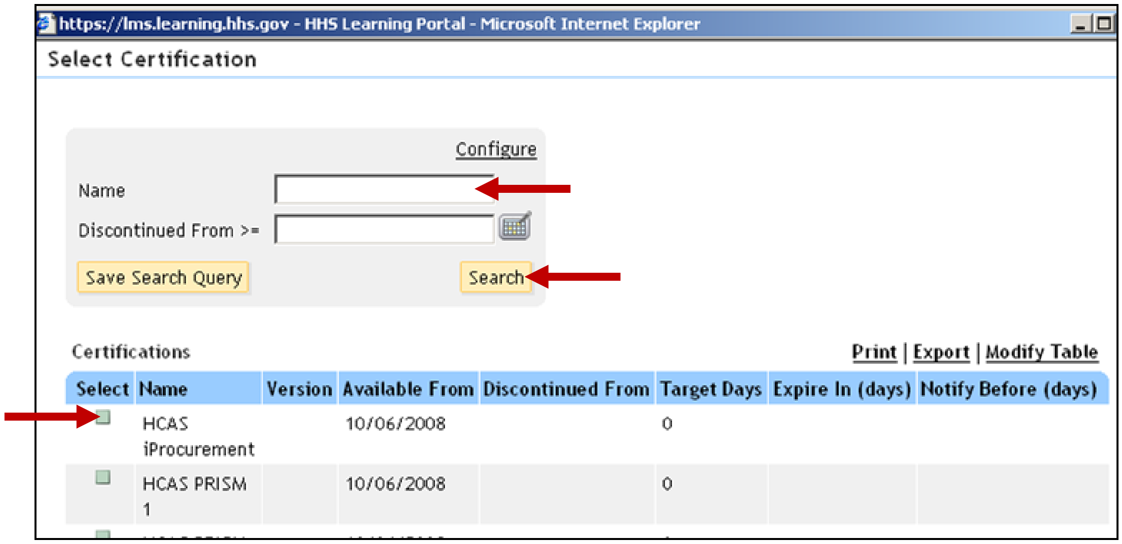
1. Log in to the LMS.

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

2. Click on the **Learning** tab.
3. Click on **Certifications** from the menu item on the left-hand sidebar. The **My Certifications** screen is the default.
4. Click **Add Certification**.



5. 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.



6. Click the box under the **Select** column to select a certification.
7. 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)

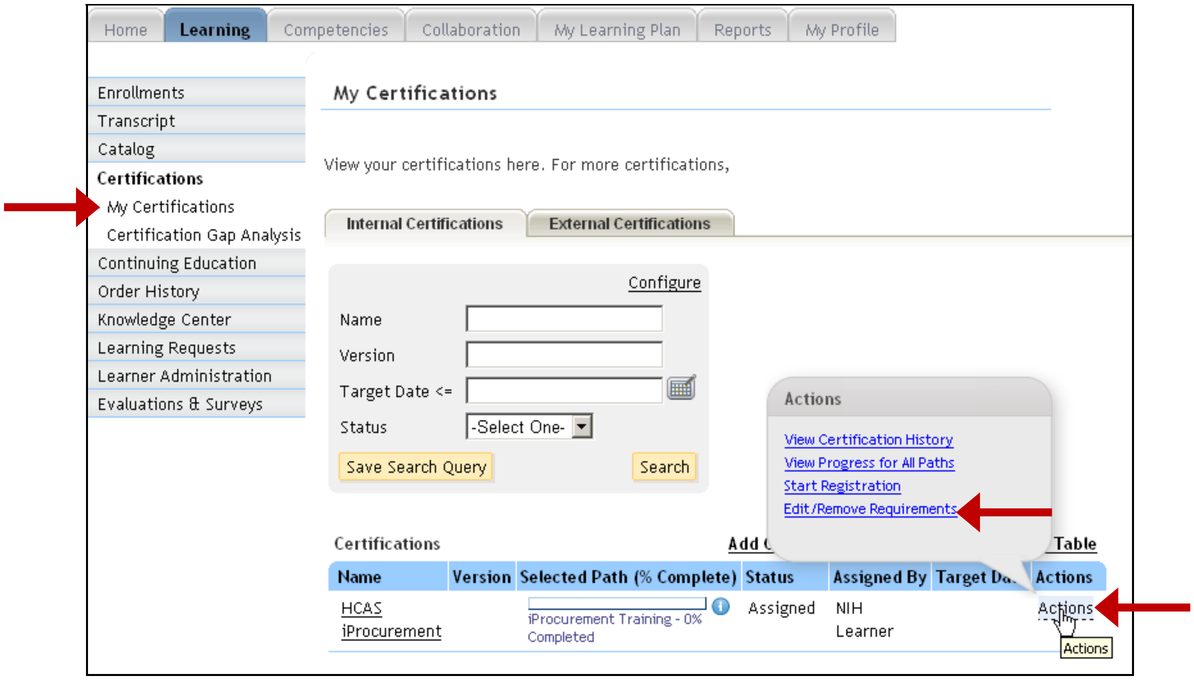
If you select a certification, you do have the ability to delete it later if you decide you no longer want to work on it.

1. Log in to the LMS.

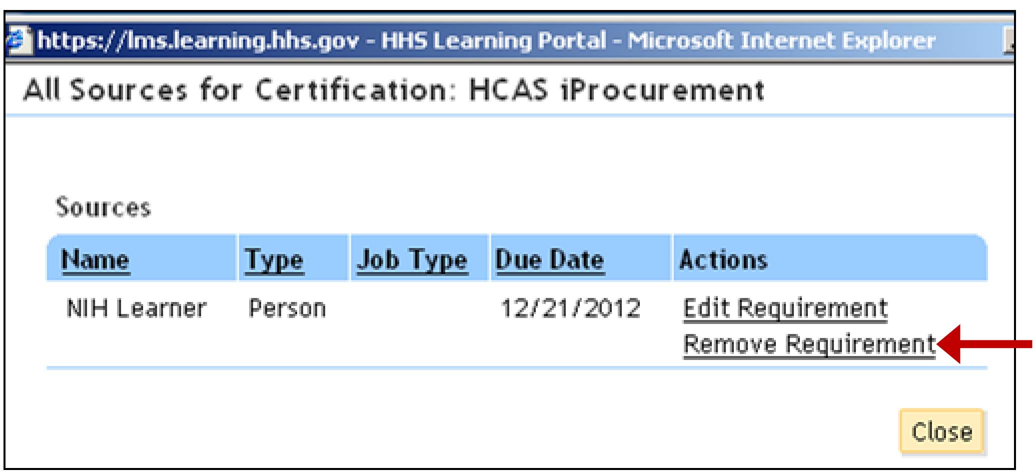
   NOTE: For instruction about logging on, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

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

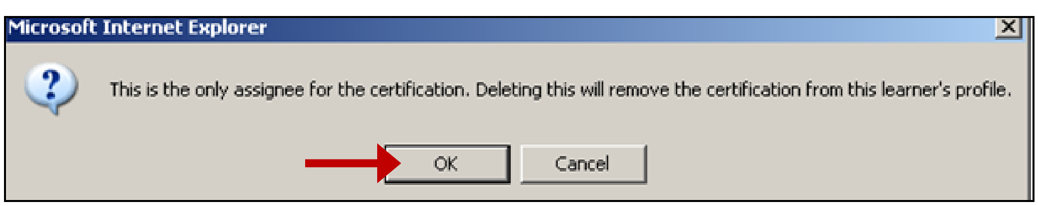
4. Under the **Actions** column you have options to **View Certification History**, **View Progress for All Paths**, **Start Registration**, or **Edit/Remove Requirements**. Hold your cursor over the **Actions** link next to the appropriate certification to see the **Actions** pop-up menu.



5. **Edit/Remove Requirements** will allow you to change any details for the certification that an administrator allows you to change.



6. Click **Remove Requirement** to delete the certification from your list completely.



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

STEP-BY-STEP (ADD AN EXTERNAL CERTIFICATION)

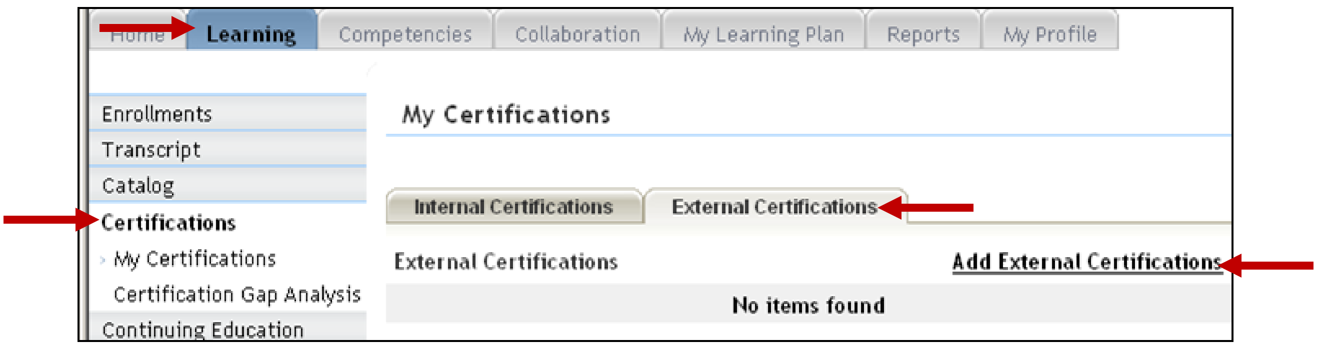
If you have earned a professional certification that was managed outside the HHS Learning Portal, you may still add it to your LMS record.

1. Log in to the LMS.

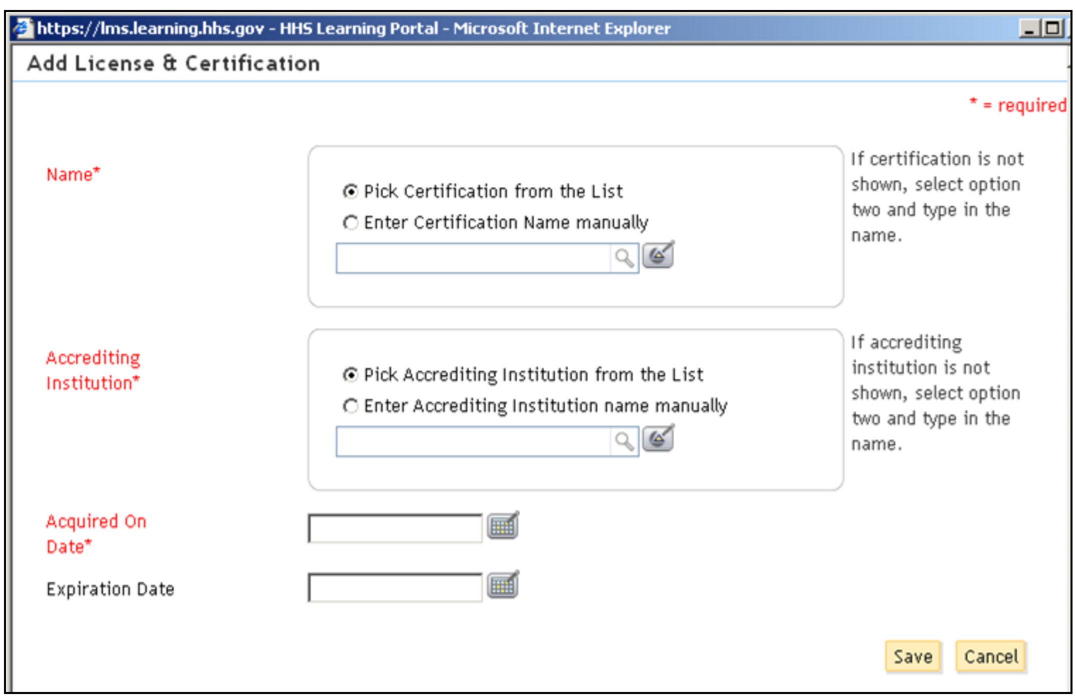
   NOTE: For instruction about logging on, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **Learning** tab.

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



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

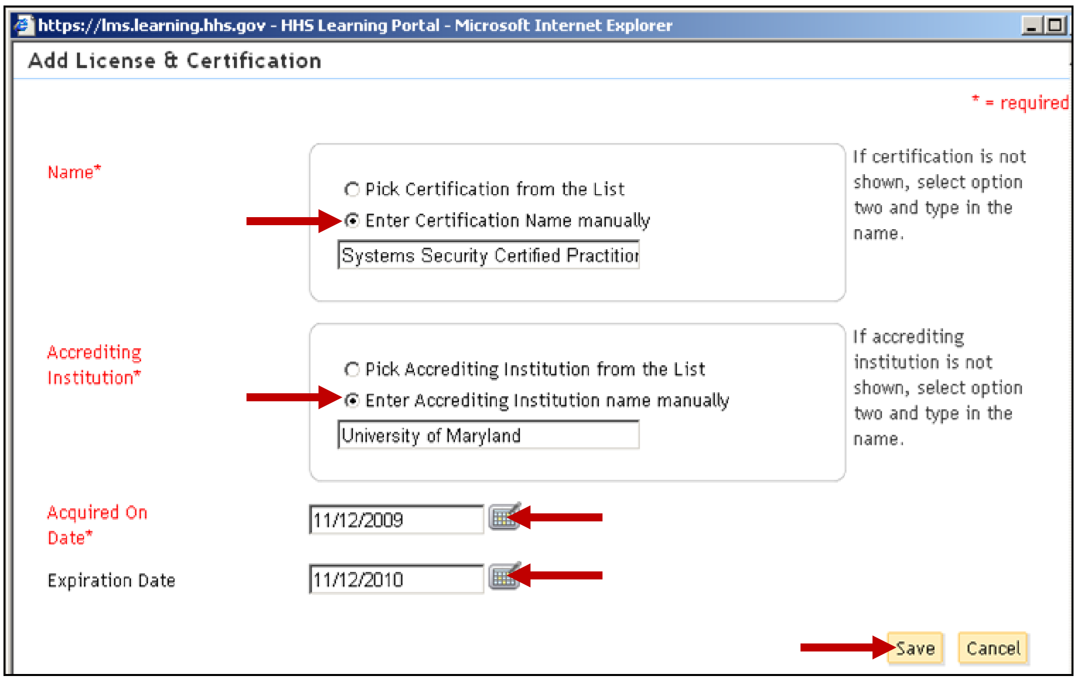


5. If another learner has entered an external certification and/or accrediting institution in the LMS, you will be able to use the **Pick … from the List** radio buttons, enter

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 ending up with multiple versions of the same certification or accrediting institution simply because someone chose to abbreviate or spell differently.

6. 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.

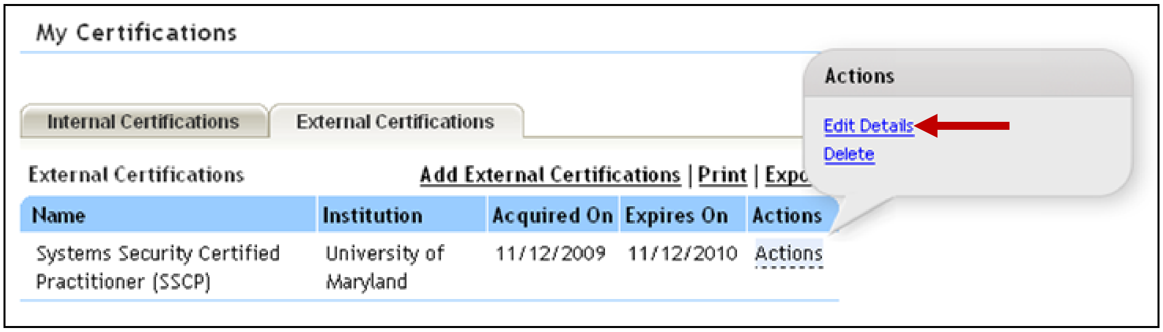


7. Use the calendar picker to choose the date on which you completed the certification (**Acquired On Date**).

8. If the certification expires, enter the **Expiration Date**.

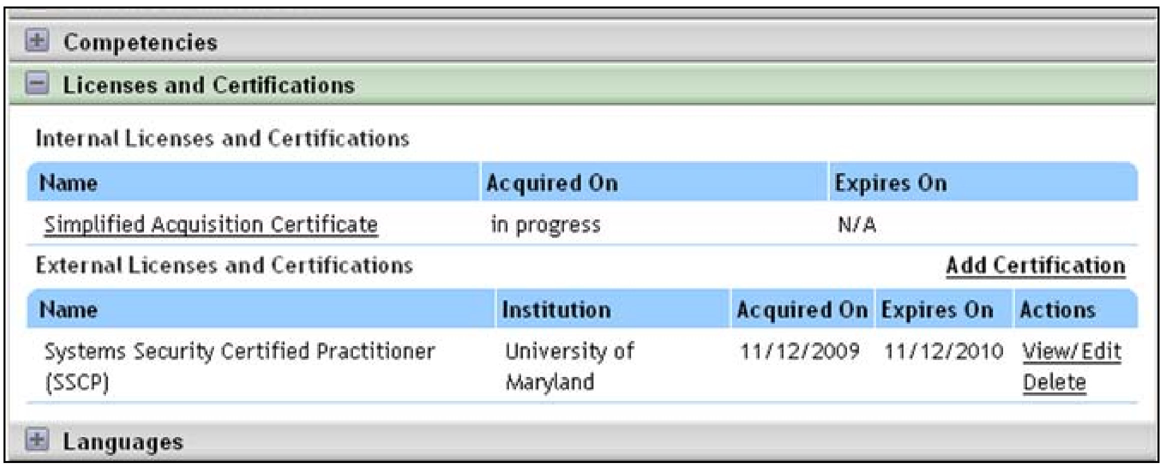
9. Click **Save**.

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



11. 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.

12. The certification will also now appear under your **Full Profile**, **Licenses and Certifications** area.



STEP-BY-STEP (DELETE AN EXTERNAL CERTIFICATION

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

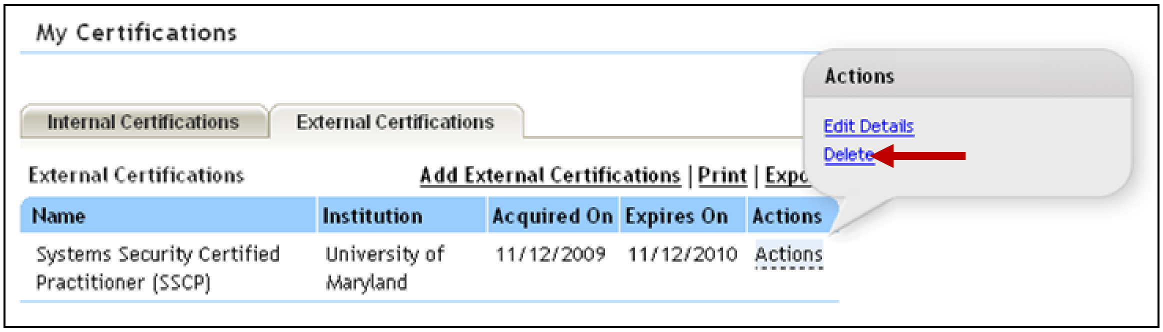
1. Log in to the LMS.

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

2. Click on the **Learning** tab.

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

4. Select the **External Certifications** tab.



5. Click **Delete** from the **Actions** menu.
6. Click **OK** to confirm.

STEP-BY-STEP (CHECK GAPS IN YOUR CERTIFICATIONS)

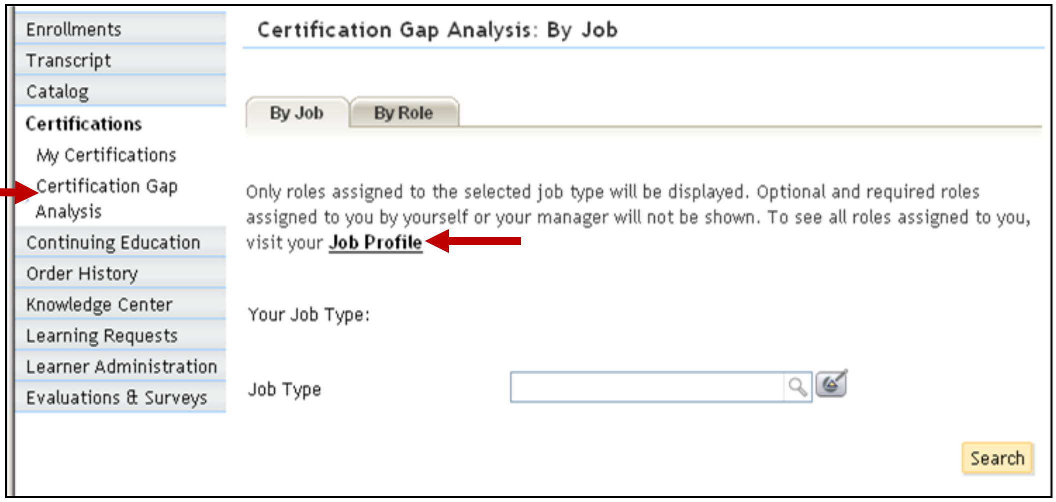
If an administrator has attached internal certifications to either a job (OPM job series) or role in the LMS, you will be able to compare your certification level against those standards. (This is ONLY useful if an administrator has linked a certification to a job or role already.)

1. Log in to the LMS.

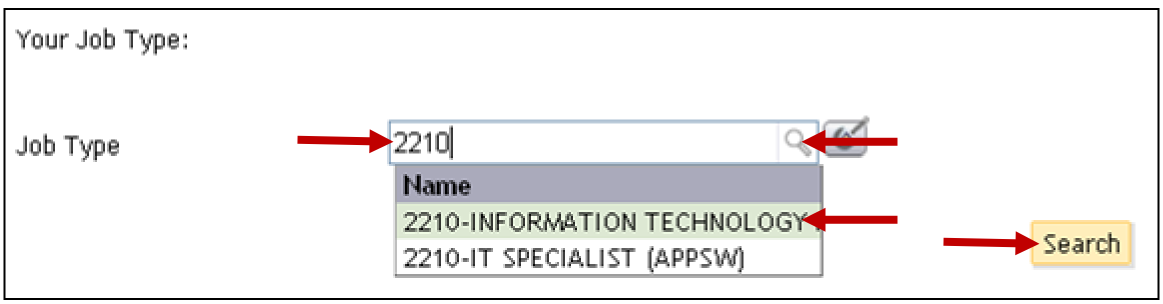
   NOTE: For instruction about logging on, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

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

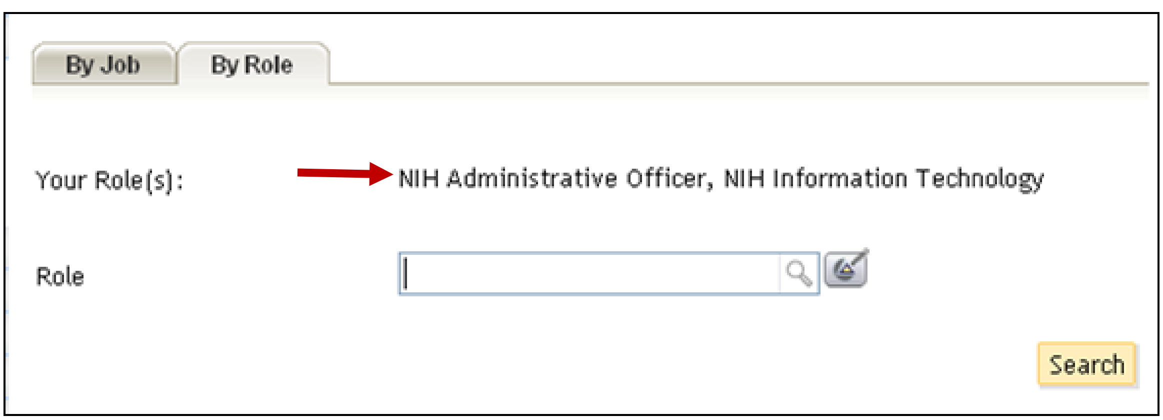
4. Click on **Certification Gap Analysis** in the left menu bar.



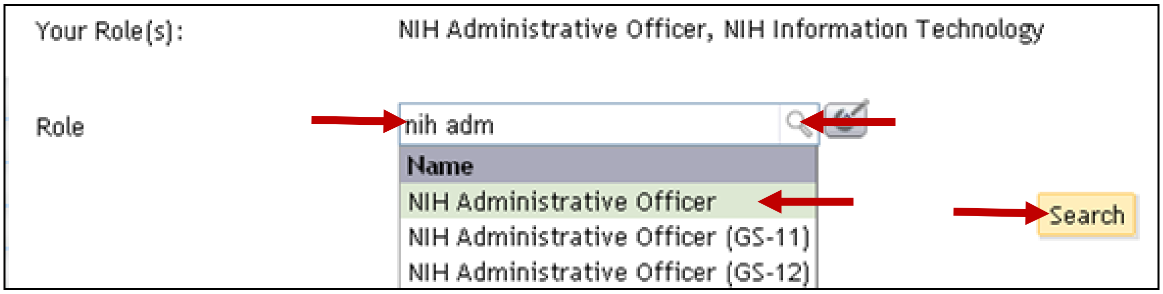
5. You may click **Job Profile** to verify what job and/or roles have been assigned to you in the LMS.
6. To check whether a certification has been attached to your job series, type the numbers of your OPM job series in the **Job Type** field, click the magnifying glass icon, and select the appropriate option from the list. Click **Search**.



7. If no results are returned, no certification has been linked to your job series by an administrator in the LMS.
8. You may also search by job role. Select the **By Role** tab. Your role(s) will be listed.



9. Begin typing the role you want to check in the **Role** field, and click the magnifying glass icon. Select the appropriate option from the list. Click **Search**.

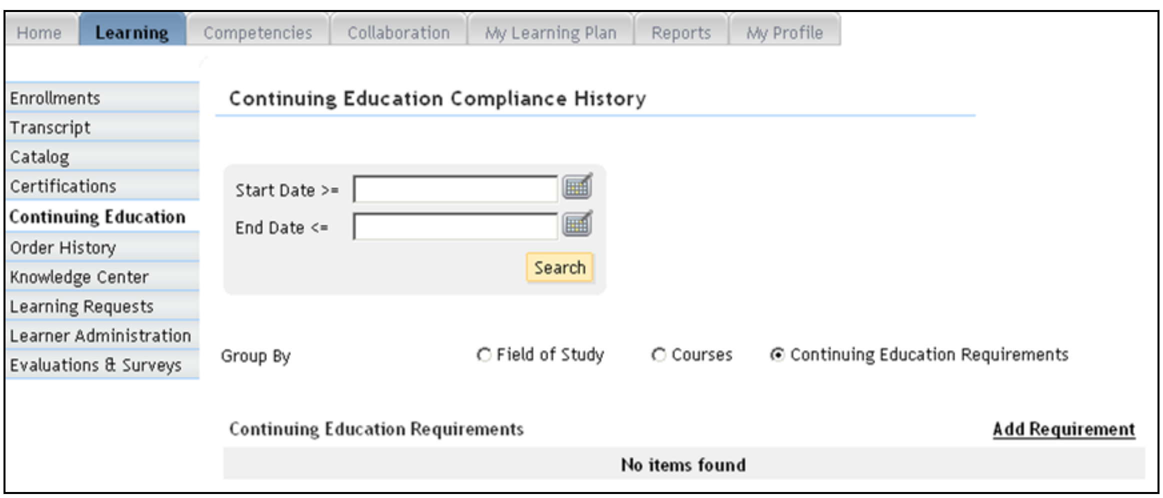


10. If no results are returned, no certification has been linked to your job role by an administrator in the LMS.

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 see. This is not an area NIH has started to use yet. In the future, you will be able to assign yourself continuing education requirements, as well as view those who have, grouped by courses or fields of study.



ORDER HISTORY

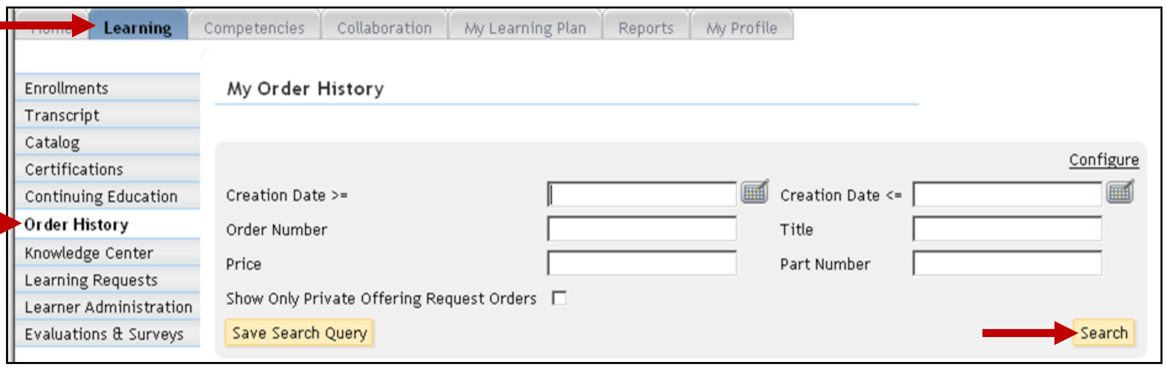
This area allows you to search for and view orders (registrations) you have placed for LMS training items in the past. It provides a record of your actions and indicates the status of a registration (cancelled, confirmed, billed, etc.).

STEP-BY-STEP (VIEW YOUR ORDER HISTORY)

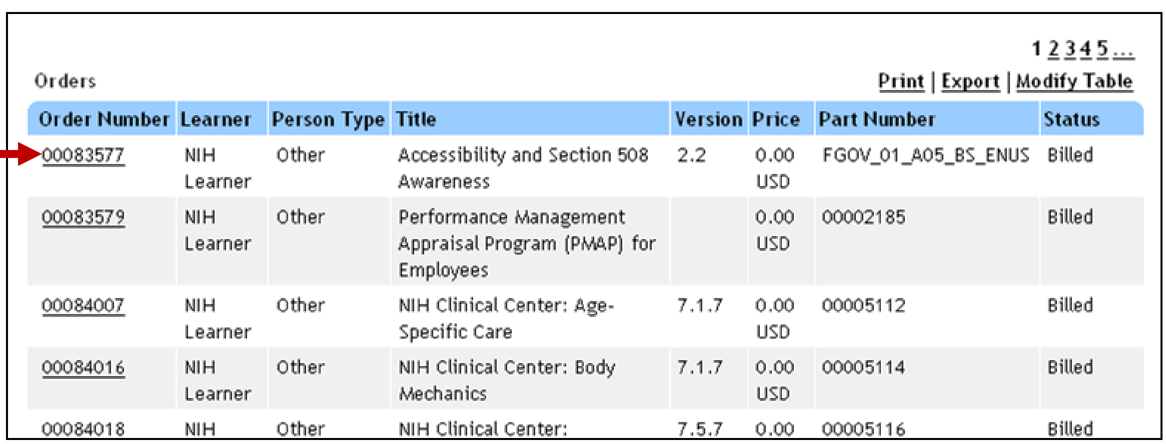
1. Log in to the LMS.

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

2. Click the **Learning** tab.
3. Click **Order History** from the left menu bar.



4. There are several criteria by which you may search for an order. To see a list of all training orders attributed to you, leave all the parameters blank and click **Search**.
5. From the list returned, you may see the status and other information about past orders. Click any order number to see more detail.



1 2 3 4 5 ...

Orders

Print | Export | Modify Table

Order Number	Learner	Person Type	Title	Version	Price	Part Number	Status
00083577	NIH Learner	Other	Accessibility and Section 508 Awareness	2.2	0.00 USD	FGOV_01_A05_BS_ENUS	Billed
00083579	NIH Learner	Other	Performance Management Appraisal Program (PMAP) for Employees		0.00 USD	00002185	Billed
00084007	NIH Learner	Other	NIH Clinical Center: Age-Specific Care	7.1.7	0.00 USD	00005112	Billed
00084016	NIH Learner	Other	NIH Clinical Center: Body Mechanics	7.1.7	0.00 USD	00005114	Billed
00084018	NIH	Other	NIH Clinical Center:	7.5.7	0.00	00005116	Billed

KNOWLEDGE CENTER

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.

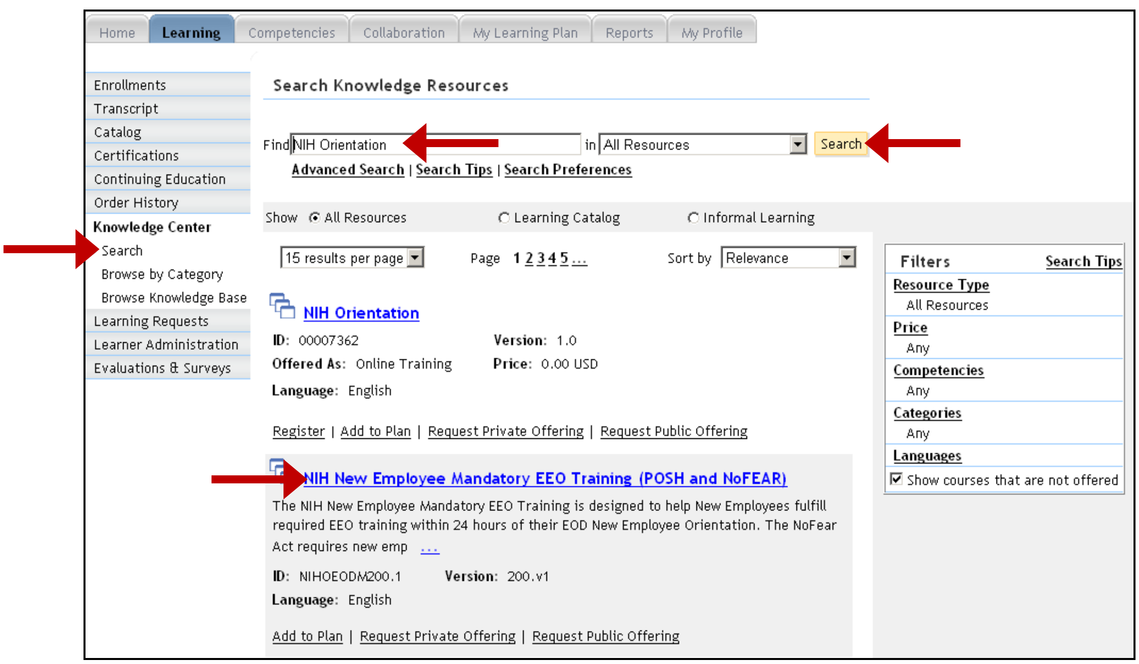
> **Note:** If you search from the **Catalog Search** portlet in the Home Dashboard, you will default to the Knowledge Center search results screen.

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

1. Log in to the LMS.

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

2. Click on the **Learning** tab.
3. Click on **Knowledge Center** from the menu item on the left-hand sidebar. The **Search** menu is the default.
4. Enter search criteria in the **Find** field and click **Search**.



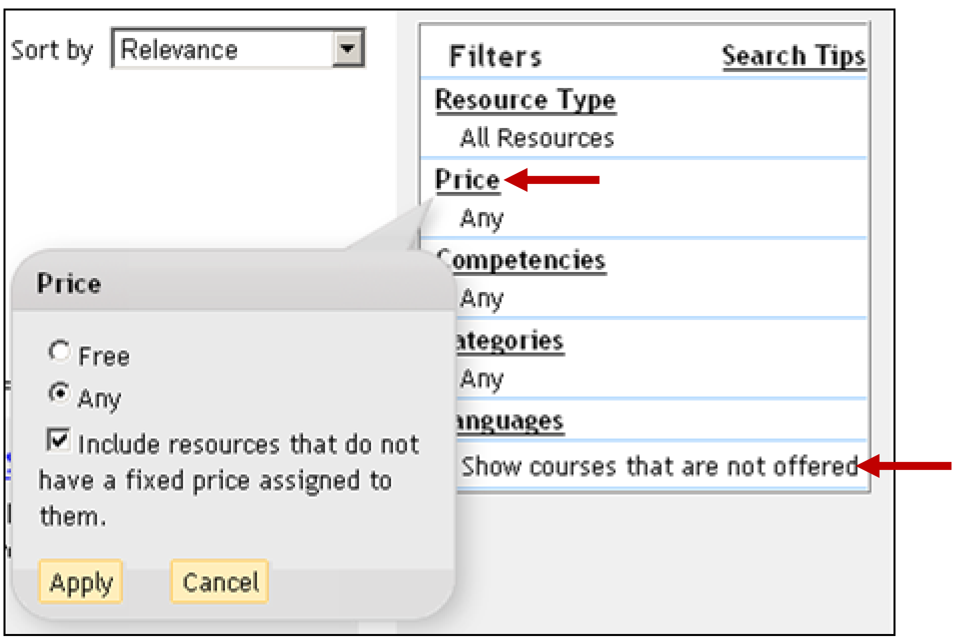
5. Some basic information is displayed directly on the screen. Click on an item's title for more information. From the Learning Details screen, you may register for the item or add it to your learning plan.
6. You may also register for an offering by clicking **Register** beneath the course title.

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

7. 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.)

8. 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**.

9. There are optional filters on the right hand side of the screen. Click any underlined criteria title for 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.



10. Other options include …

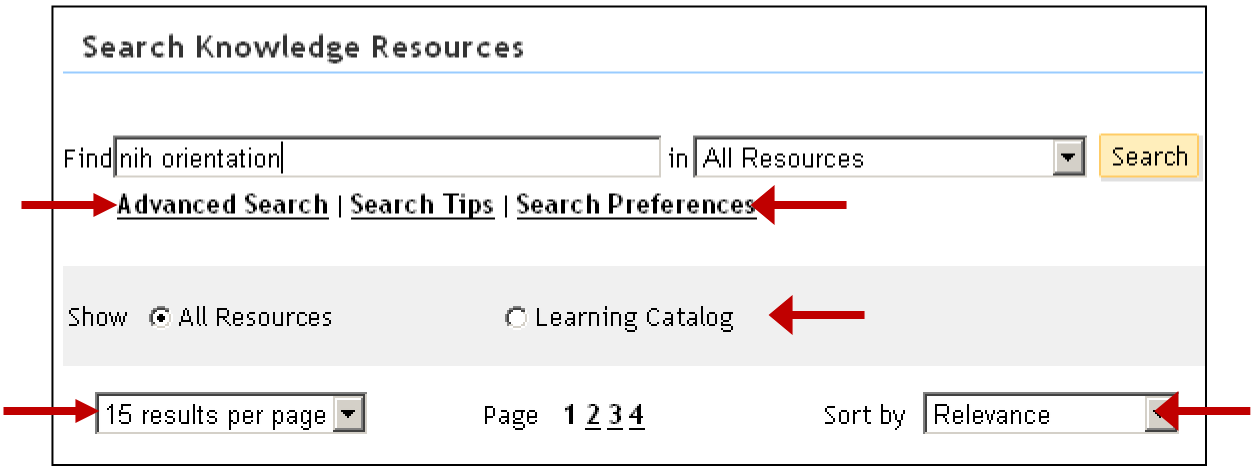
   a. **Advanced Search** – use this if you are having trouble finding what you are looking for. Be careful not to narrow your search too much by entering too many search criteria.

   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.).



BROWSE BY CATEGORY – see STEP-BY-STEP (REGISTER FOR TRAINING USING BROWSE BY CATEGORY).

STEP-BY-STEP (BROWSE THE KNOWLEDGE BASE)

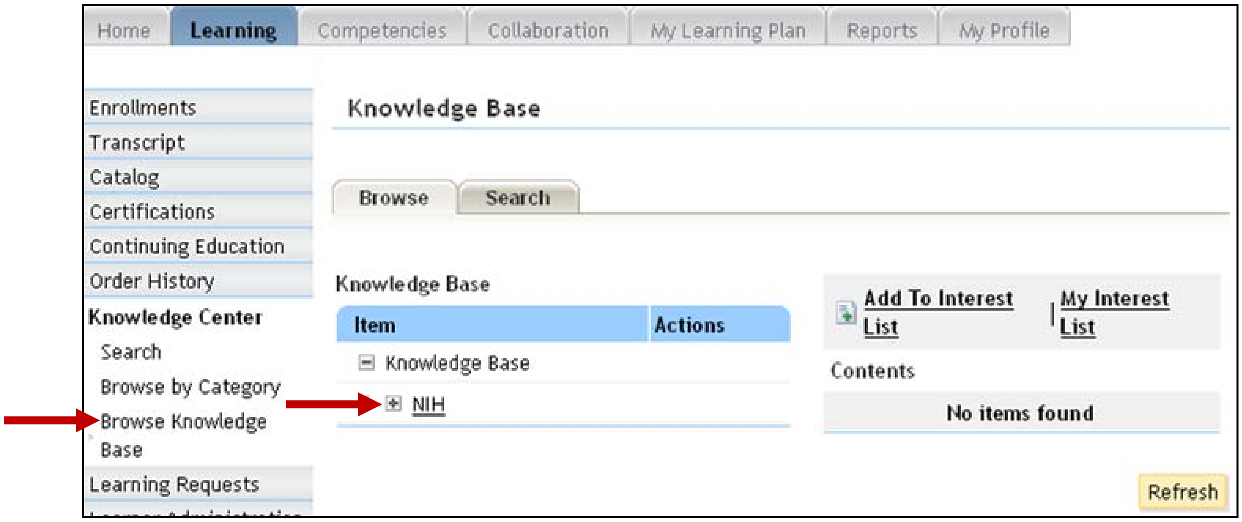
The **Knowledge Base** is a repository where LMS administrators can post documents that are not attached to courses or other formal learning items. Use of documents in the Knowledge Base is not tracked, and no training record will be recorded.

1. Log in to the LMS.

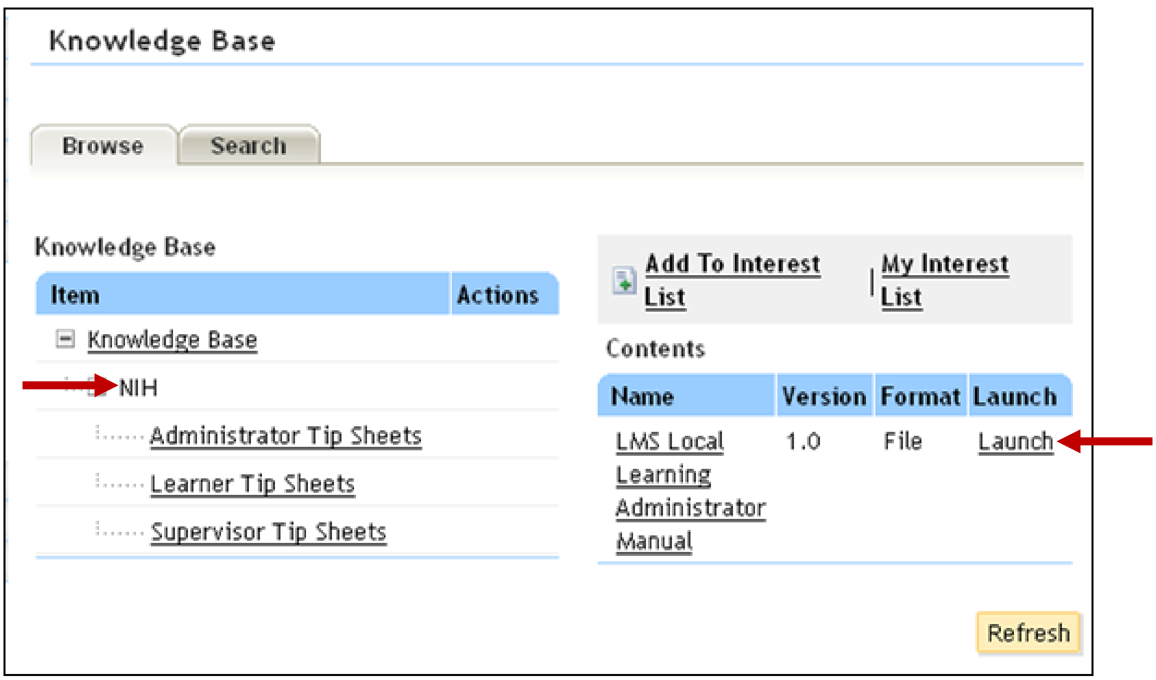
   NOTE: For instruction about logging on, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **Learning** tab.

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



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



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

6. 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.)

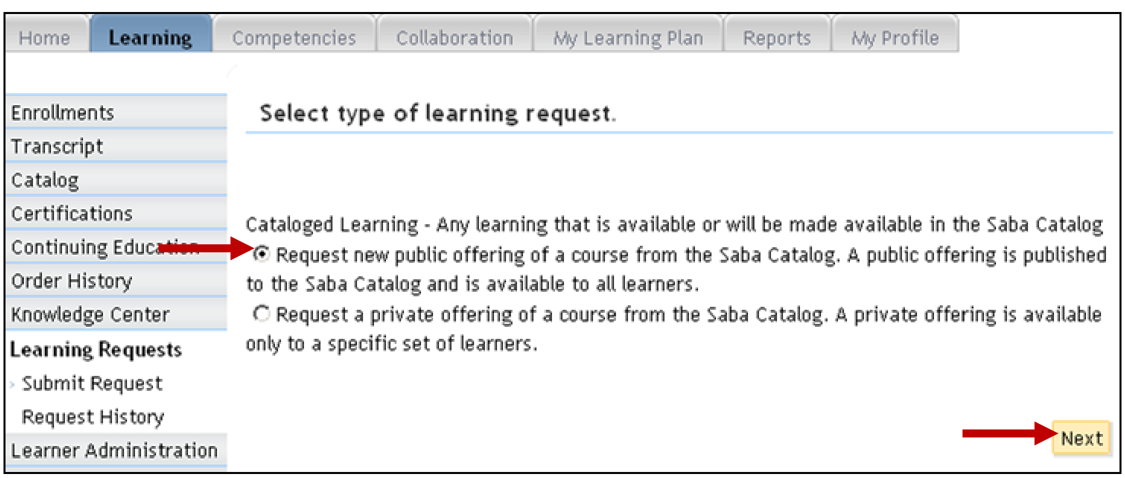
STEP-BY-STEP (CREATE A LEARNING REQUEST FOR A PUBLIC OFFERING)

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.

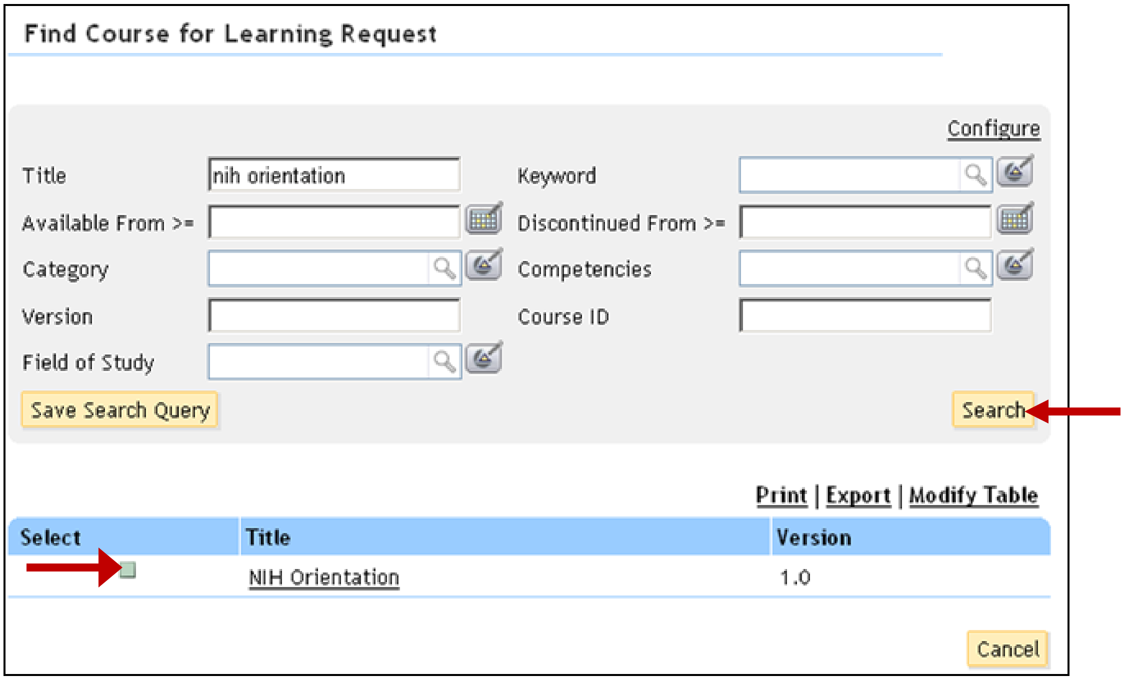
1. Log in to the LMS.

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

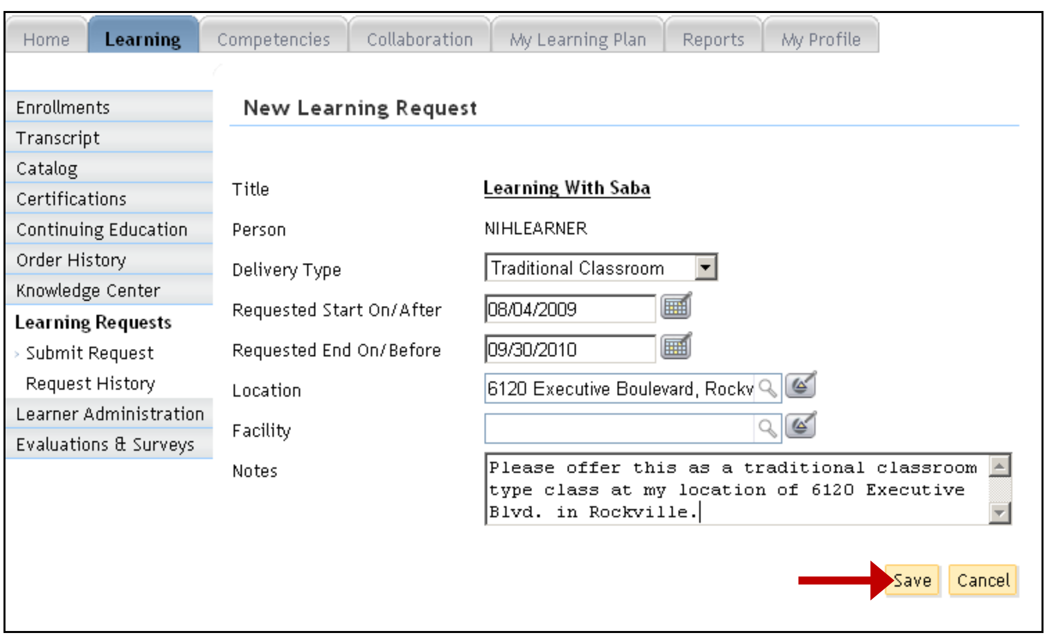
2. Click the **Learning** tab.
3. Click **Learning Requests** from the menu item on the left-hand sidebar. The **Select type of Learning Request** screen is the default.
4. Click the radio button **Request new public offering of a course from the Saba Catalog. A public offering is published to the Saba Catalog and is available to all learners.**



5. Click **Next**.
6. Enter search criteria in the **Find Course for Learning Request** screen and click **Search**.
7. Click on the **Select** box next to the correct course title.



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



10. You will be taken to the **Learning Requests** screen, where you should see the new learning request listed.

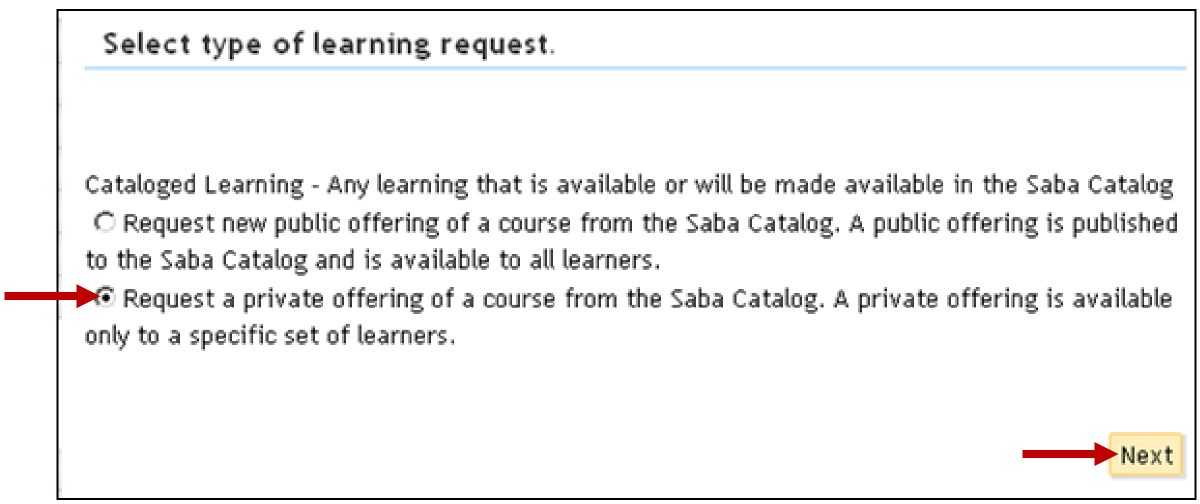
STEP-BY-STEP (CREATE A LEARNING REQUEST FOR A PRIVATE OFFERING)

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. Log in to the LMS.

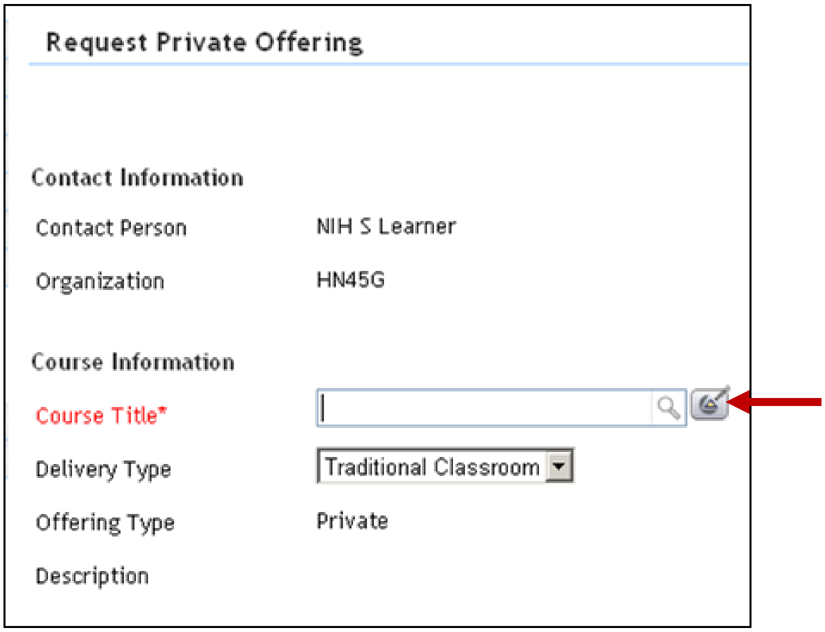
   NOTE: For instruction about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click the **Learning** tab.
3. Click **Learning Requests** from the menu item on the left-hand sidebar. The **Select type of Learning Request** screen is the default.
4. Click the radio button **Request a private offering of a course from the Saba Catalog. A private offering is available only to a specific set of learners.**



5. Click **Next**.

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



7. Click **Save** at the bottom of the **Request Private Offering** screen when you are finished.
8. 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)

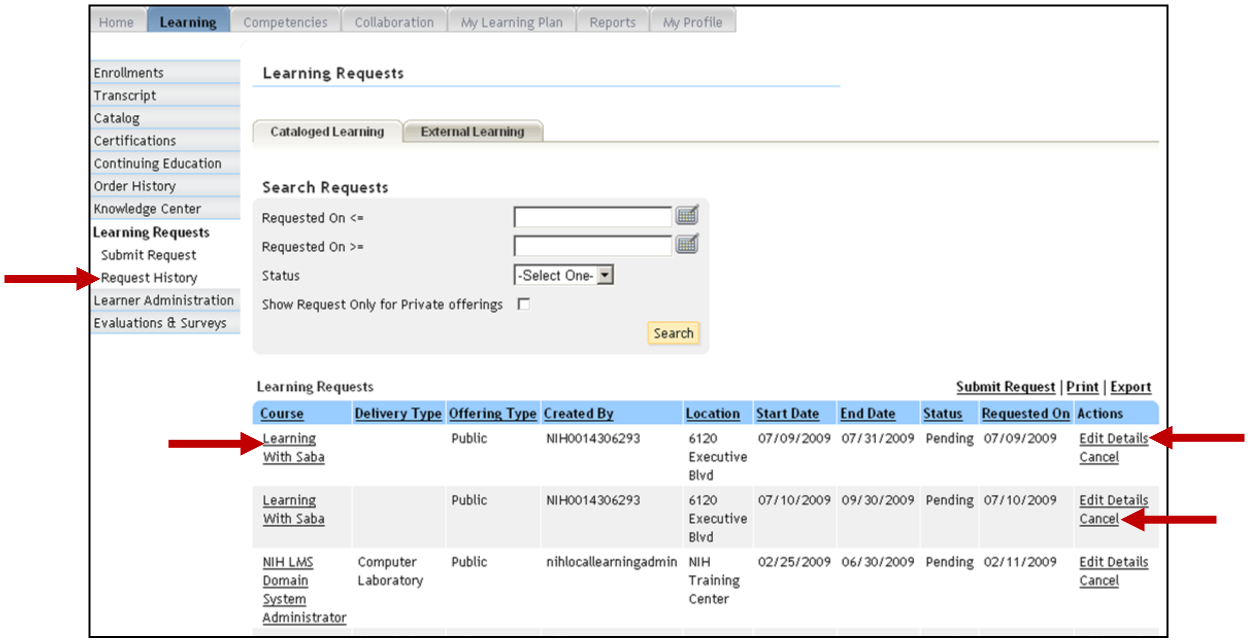
You may view learning requests submitted by you or for you. Do the following in order to check their status or make changes:

1. Log in to the LMS.

   NOTE: For instructions about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click the **Learning** tab.

3. 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.



4. Click the title of any **Course** to access details about it, including a **Register** option.
5. Click **Edit Details** to change the details of the learning request itself.
6. Click **Cancel** to withdraw the learning request. Click **OK** to confirm the cancellation.

LEARNER ADMINISTRATION

The **Learner Administration** area on the left-hand menu sidebar provides links to access several functions discussed elsewhere in this guide, including Enrollments, Certifications, and Transcript. It also provides access to Curricula, which is detailed below.

A curriculum is a set of training items that have been grouped together by an administrator. Unlike certifications, there is usually no deadline for completion or requirement to complete again periodically. The **My Curricula** area allows you to look at the details and progress made on curricula that have been assigned to you by someone else or selected by you.

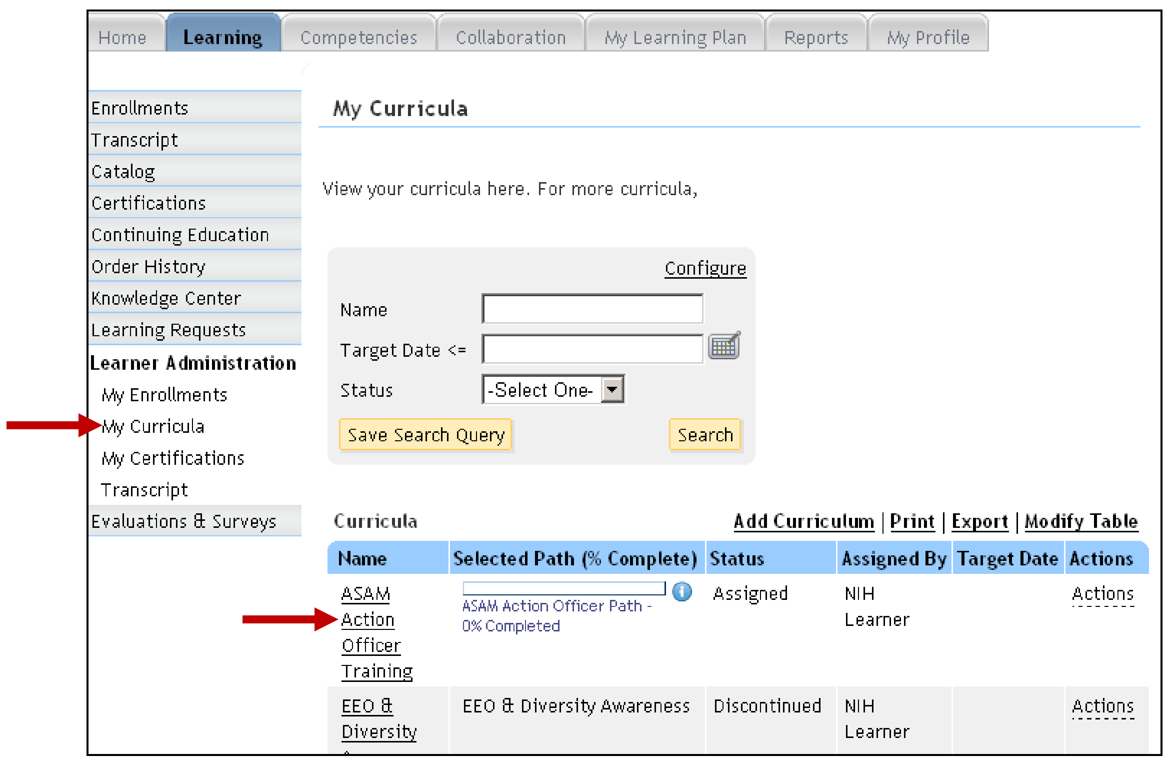
STEP-BY-STEP (VIEW AND MANAGE CURRICULA)

1. Log in to the LMS.

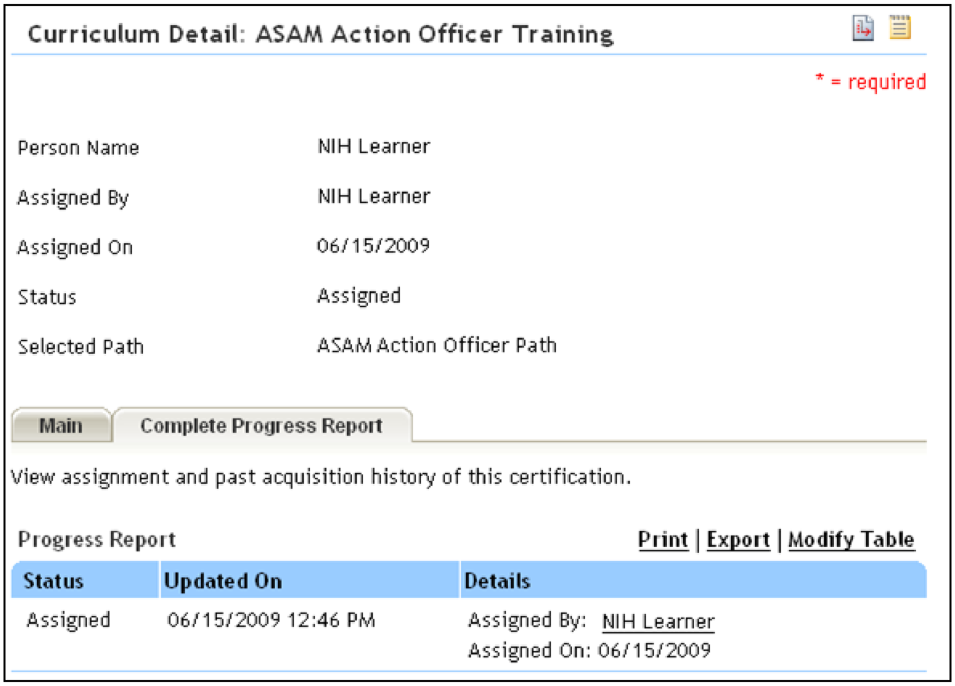
   NOTE: For instruction about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **Learning** tab.

3. Click on **Learner Administration**, then **My Curricula** from the menu items on the left. You will see the **My Curricula** screen with any curricula assigned to you listed below the search area. Use the search criteria only if you need to narrow the list of curricula displayed.

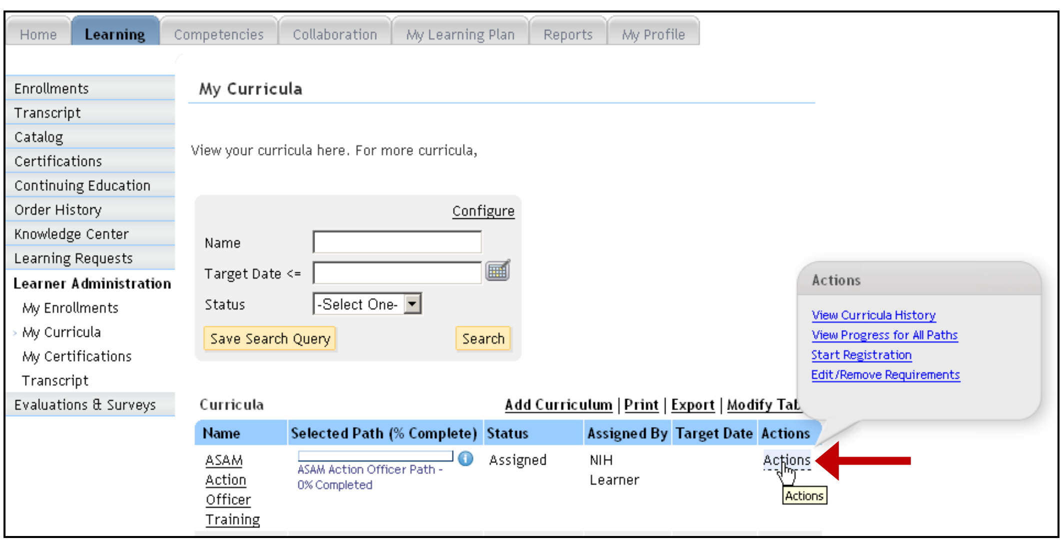


4. You may click the title of any curriculum listed to see detailed information, including the percentage complete, required and optional courses, and attachments added by administrators. The **Complete Progress Report** tab lists who assigned the curriculum to you and when.



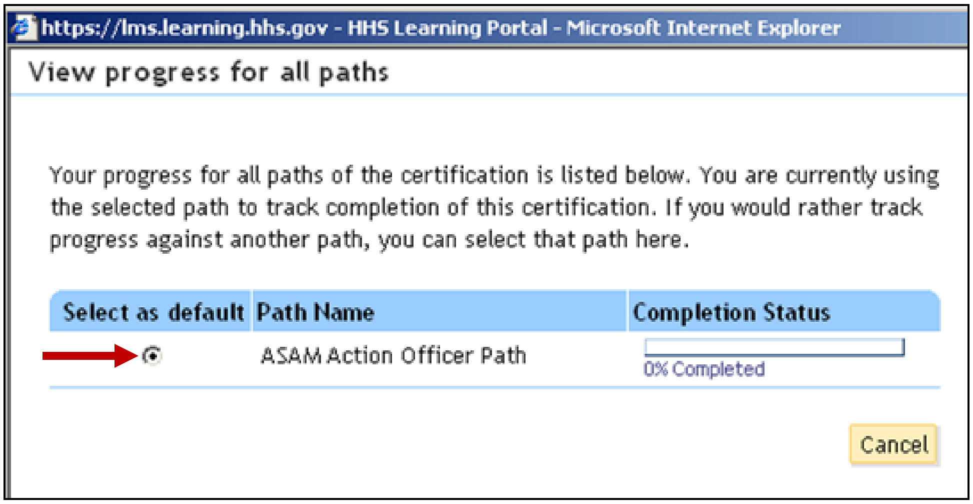
5. Click **Cancel** on the **Main** tab to return to **My Curricula**.

6. Under the **Actions** column you have options to **View Curricula History**, **View Progress for All Paths**, **Start Registration**, or **Edit/Remove Requirements**. Hold your cursor over the **Actions** link next to the appropriate curriculum to see the **Actions** pop-up menu.

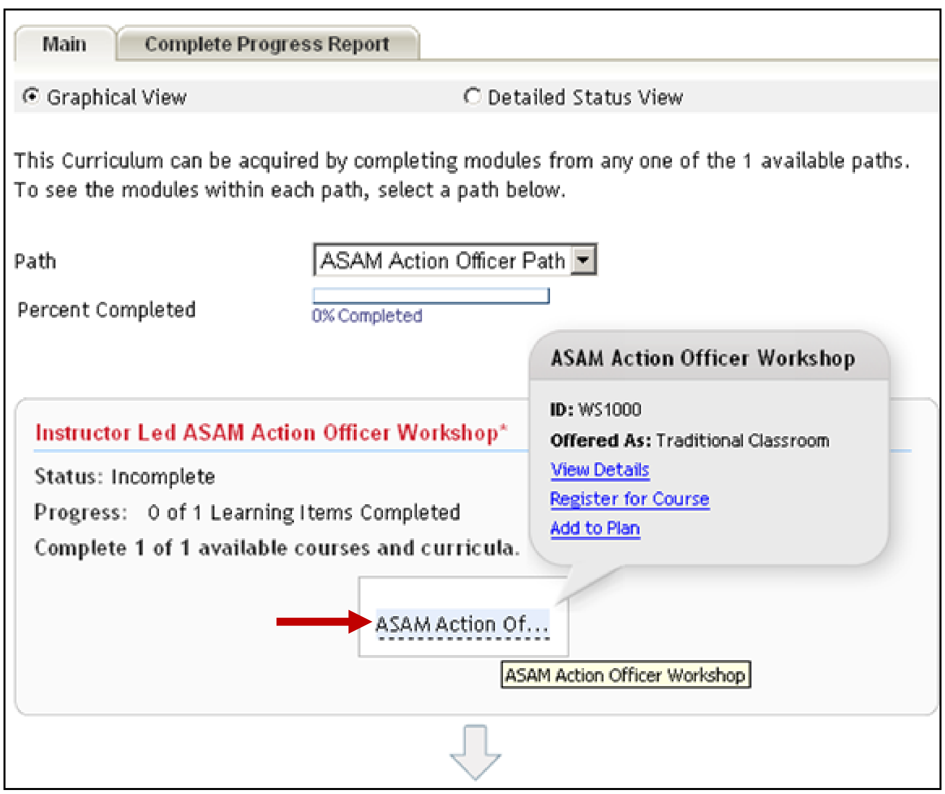


11. **View Curricula History** takes you to the same **Complete Progress Report** mentioned in step 4 above.

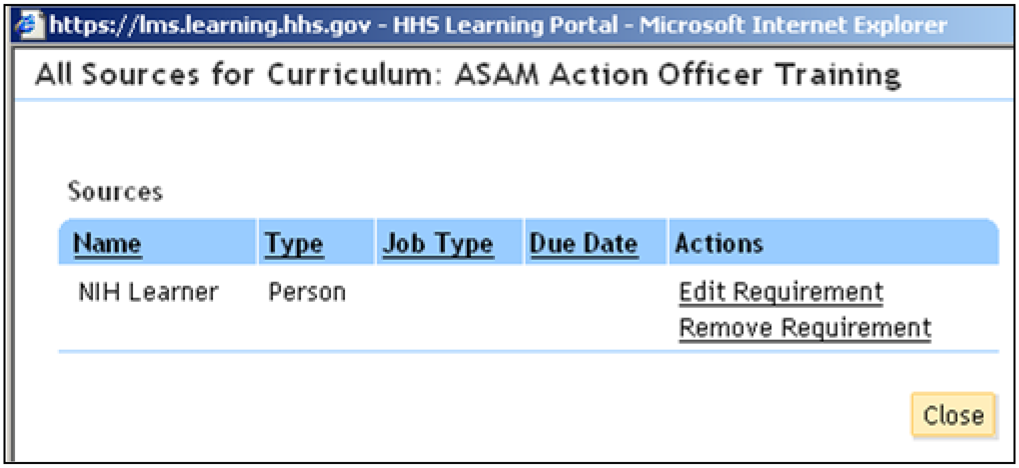
12. **View Progress for all Paths** gives you a pop-up window displaying the available paths through a curriculum and your progress for each. If more than one path is available through a curriculum and you wish to change your path, you could do that here.



13. **Start Registration** takes you to the **Main** tab mentioned in steps 4 and 5 above. From here, you may hold your cursor over the link provided in a course box to see a pop-up menu with options to **View Details** of the course, **Register for Course**, or **Add to Plan** (learning plans are discussed later).



14. **Edit/Remove Requirements** will allow you to change any details for the curriculum that an administrator allows you to change. Click **Close** to return to **My Curricula**.



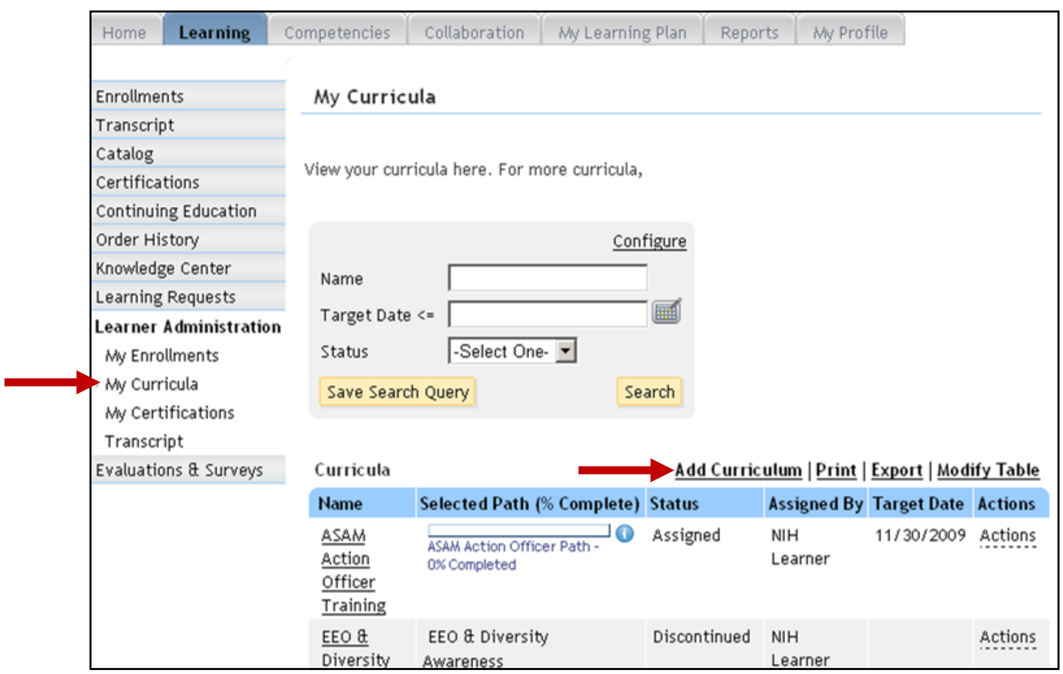
STEP-BY-STEP (ADD A CURRICULUM)

As a learner, you have the ability to choose any curriculum available to you in the LMS and assign it to yourself to work on.

1. Log in to the LMS.

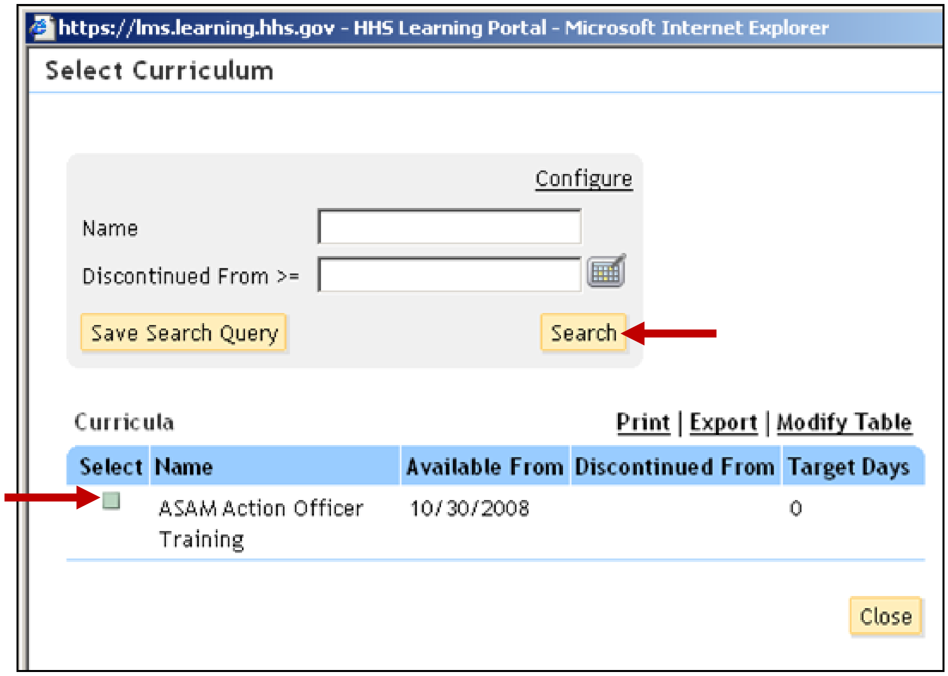
   NOTE: For instruction about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **Learning** tab.
3. Click on **Learner Administration**, then **My Curricula** from the menu items on the left.



4. Click **Add Curriculum**.

5. In the **Select Curriculum** pop-up window, you may search for a specific curriculum by entering part of the title in the **Name** field and clicking **Search**. For a list of all curricula available to you in the LMS, click **Search** without entering anything into the search fields.



6. Click the checkbox under the **Select** column next to the appropriate curriculum to add it to your curricula list.

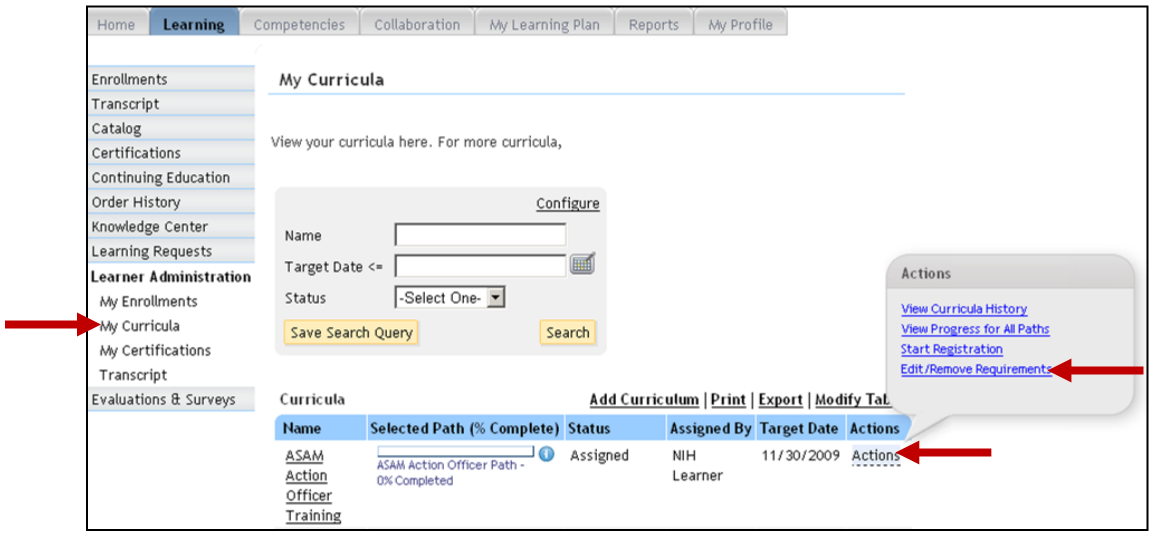
STEP-BY-STEP (DELETE A CURRICULUM)

You may delete a curriculum in your list if it was electively assigned to you.

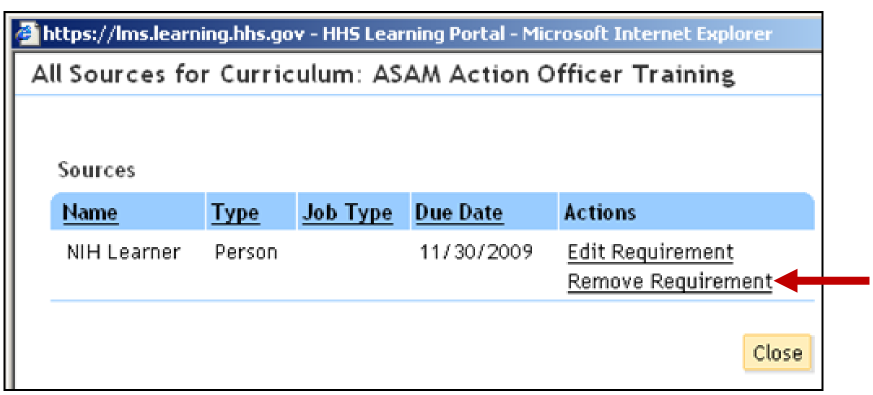
1. Log in to the LMS.

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

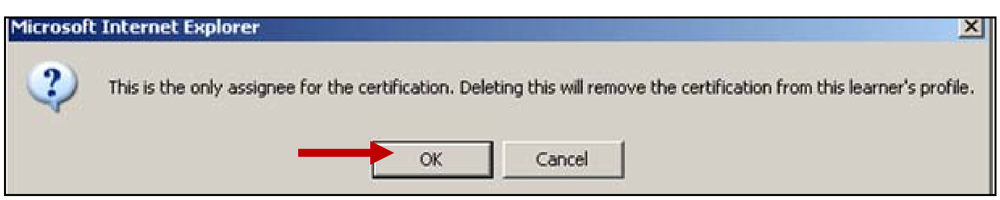
2. Click on the **Learning** tab.
3. Click on **Learner Administration**, then **My Curricula** from the menu items on the left.



4. Hold your cursor over the **Actions** link in the **Actions** column next to the curriculum you want to delete. In the **Actions** pop-up menu, click **Edit/Remove Requirements**.
5. In the **All Sources for Curriculum** pop-up window, click **Remove Requirement**.



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



EVALUATIONS & SURVEYS

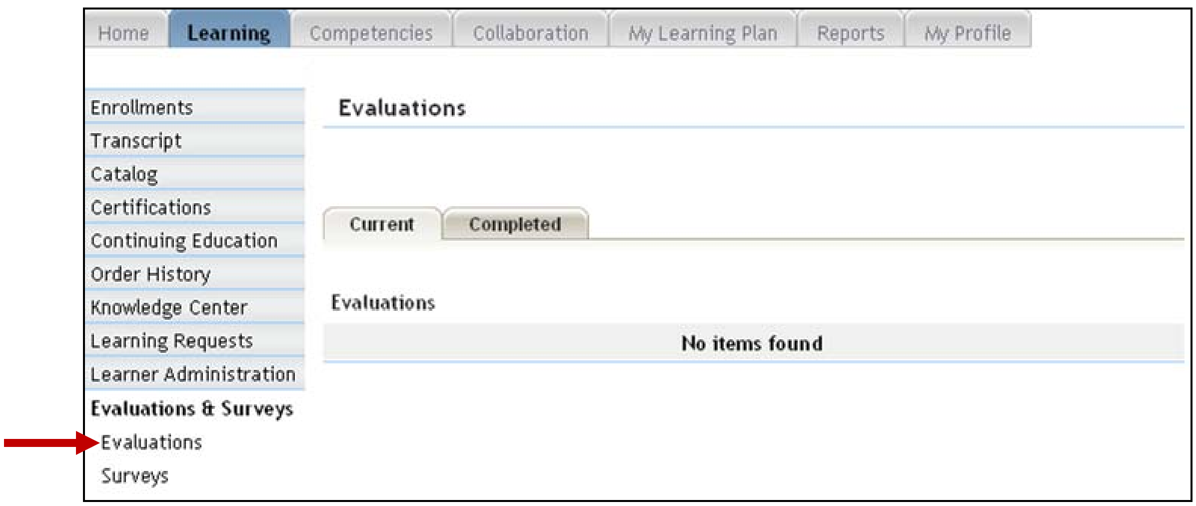
You will only find items in your **Evaluations** or **Surveys** area if they have been assigned to you. Evaluations could be attached to courses by administrators, and surveys may be assigned to specific learners or groups.

STEP-BY-STEP (COMPLETE AN EVALUATION)

1. Log in to the LMS.

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

2. Click on the **Learning** tab.
3. Select **Evaluations & Surveys**, then **Evaluations** from the left menu items.



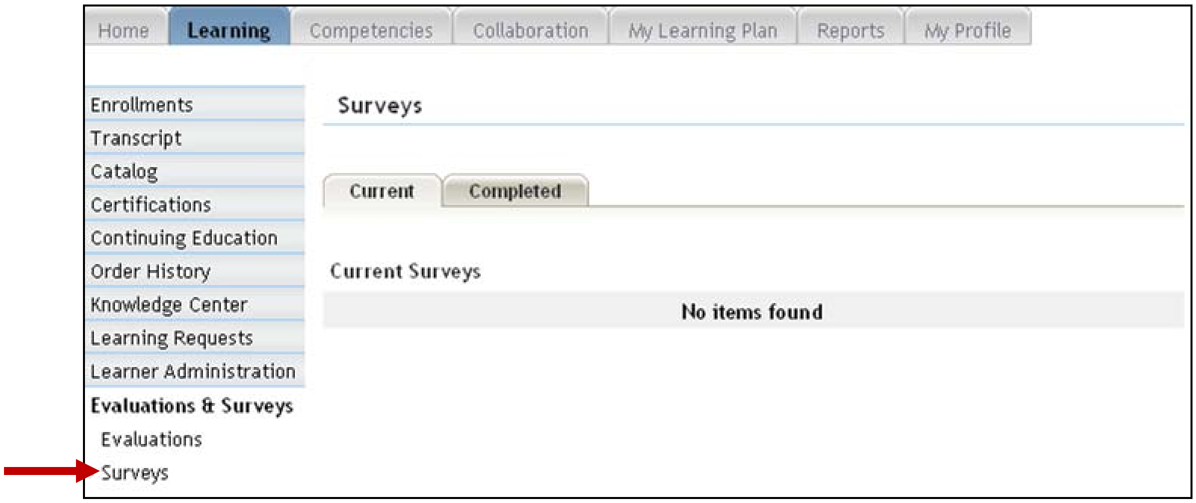
4. If an evaluation was attached to a course you took, it will be listed in the default **Current** tab. Launch the evaluation and complete it as directed.
5. Evaluations you have finished will be listed under the **Completed** tab.

STEP-BY-STEP (COMPLETE A SURVEY)

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. Click on the **Learning** tab.
3. Select **Evaluations & Surveys**, then **Surveys** from the left menu items.



4. If a survey has been assigned to you, it will be listed in the default **Current** tab. Launch the survey and complete it as directed.
5. Surveys you have finished will be listed under the **Completed** tab.

MANAGING YOUR COMPETENCIES (THE COMPETENCIES TAB)

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

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.

COMPETENCIES

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

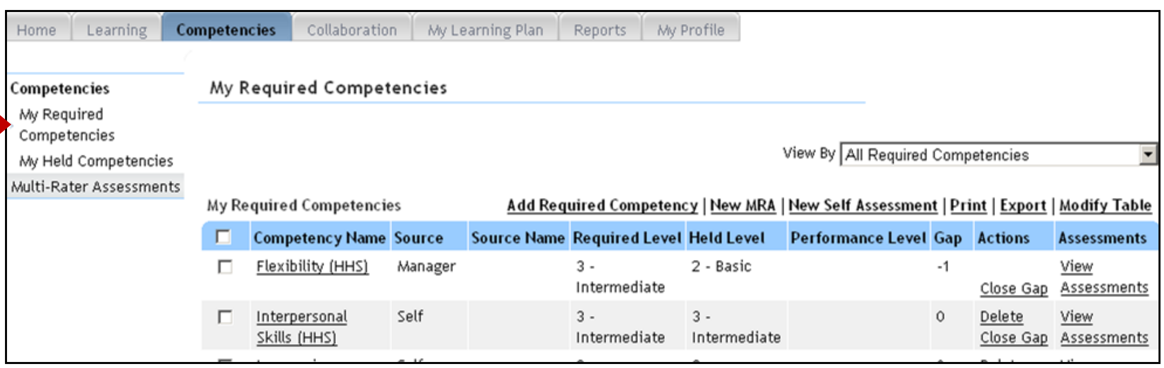
- **My Required Competencies** – This is the default view. Here you will see a list of competencies that have been assigned to you.
- **My Held Competencies** – Learners can view competencies against which they have assessed themselves.

STEP-BY-STEP (VIEW REQUIRED COMPETENCIES)

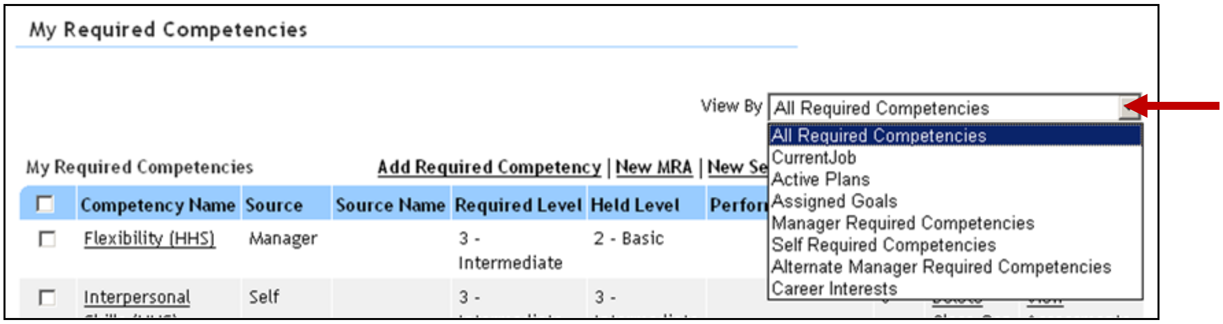
1. Log in to the LMS.

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

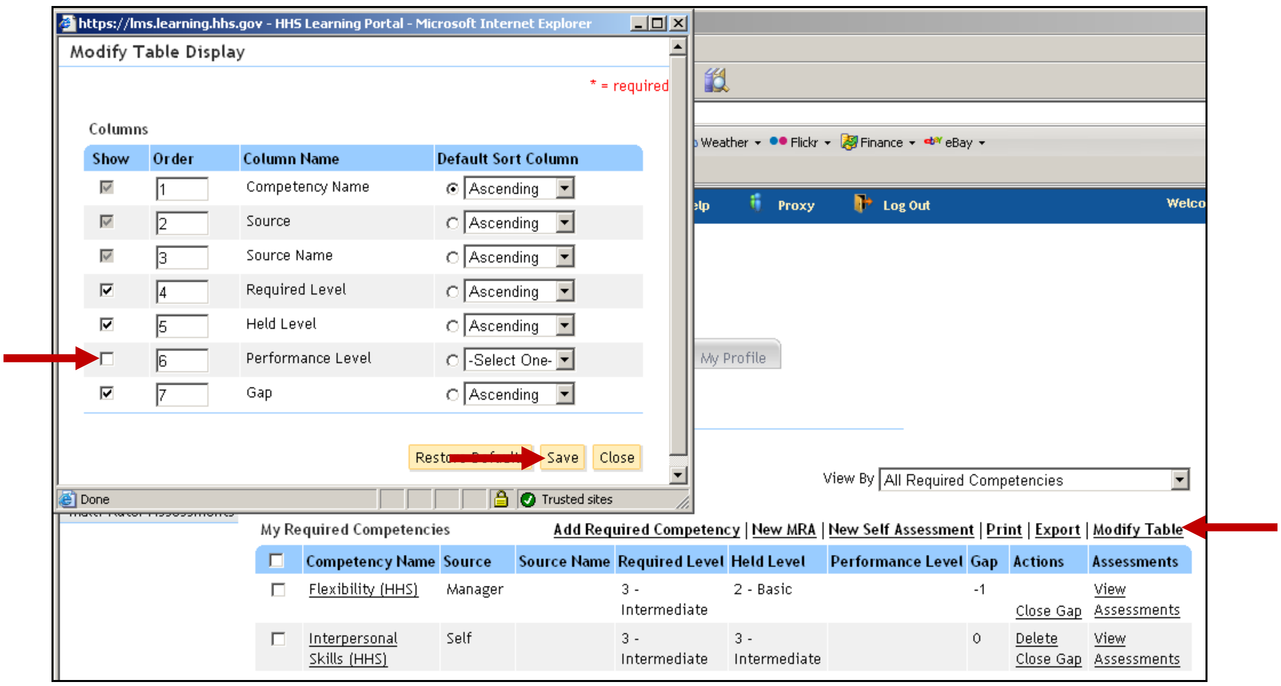
2. Click on the **Competencies** tab. **My Required Competencies** is the default screen.



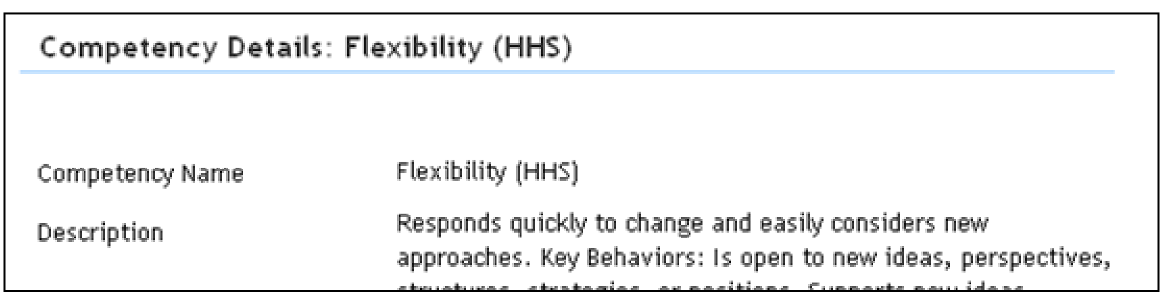
3. You may filter the list of required competencies by any of the criteria in the **View By** drop-down menu.



4. 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**.



5. 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.

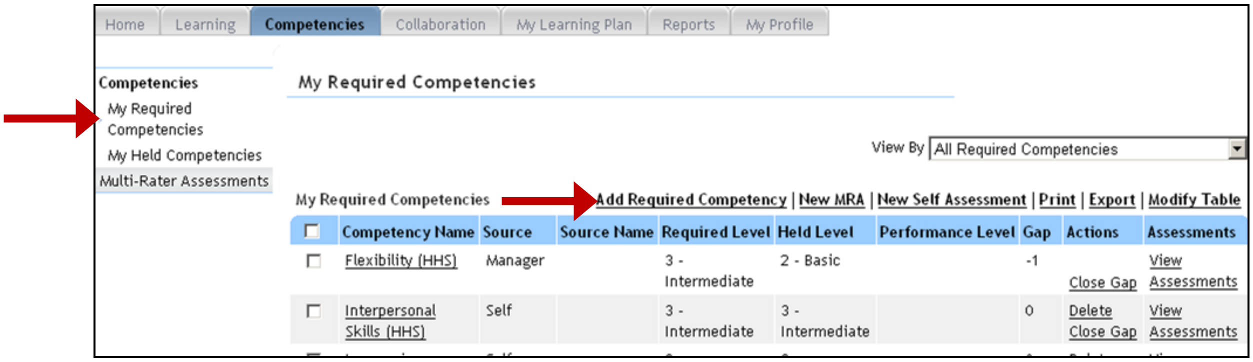


STEP-BY-STEP (ADD A REQUIRED COMPETENCY)

1. Log in to the LMS.

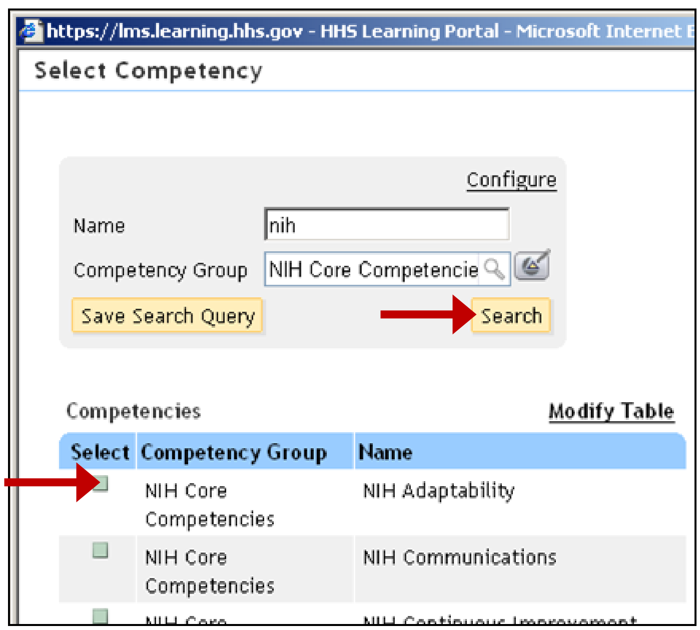
   NOTE: For instructions about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **Competencies** tab. **My Required Competencies** is the default screen.



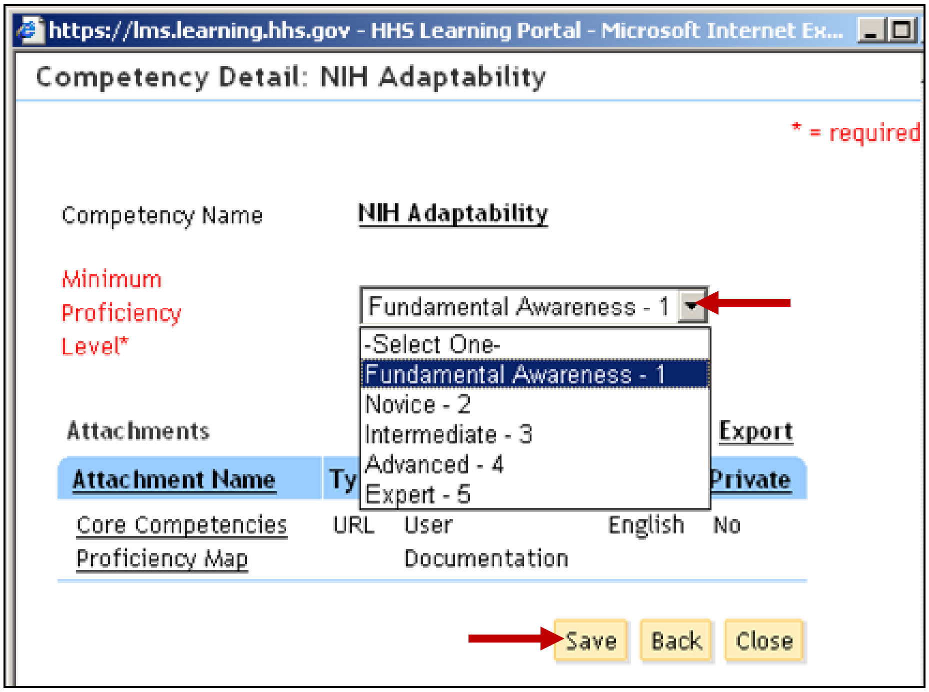
3. Click **Add Required Competency**.

4. In the **Select Competency** pop-up window, enter the **Name** of the competency you want to find and click **Search**. You may also enter a **Competency Group** in the search criteria.



5. Select the desired competency by clicking the **Select** box in the appropriate row.

6. The **Competency Detail** pop-up window will appear. In the **Minimum Proficiency Level** drop down list, select the proficiency level you are supposed to achieve for your job level. This should be your target proficiency level.



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

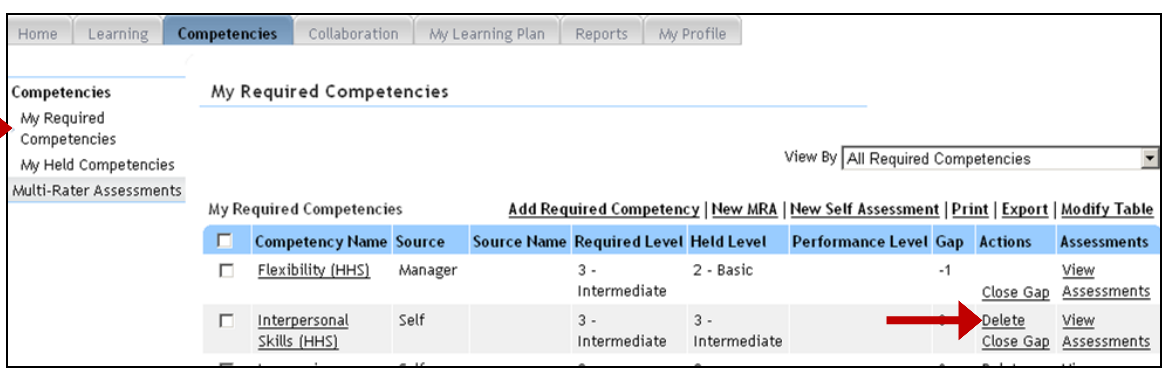
STEP-BY-STEP (DELETE A COMPETENCY)

You may only delete competencies you have chosen for yourself as electives.

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. Click on the **Competencies** tab. **My Required Competencies** is the default screen.



3. If you are able to delete a competency, you will see a **Delete** link under the **Actions** column. Click **Delete**.

4. Click **OK** to confirm the deletion.

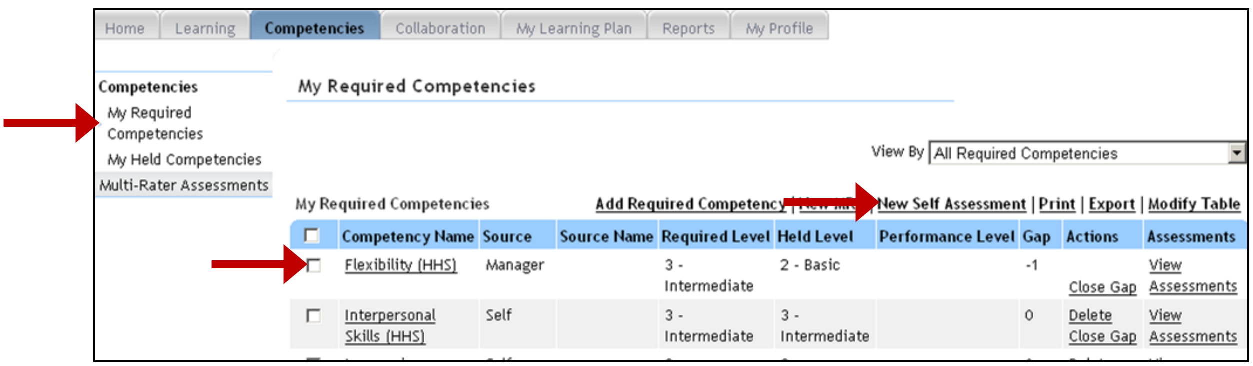
5. The competency you deleted will no longer appear in **My Required Competencies**.

STEP-BY-STEP (COMPLETE A COMPETENCY SELF-ASSESSMENT)

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. Click on the **Competencies** tab. **My Required Competencies** is the default screen.



3. Click the checkbox in front of any competency you want to assess now. You may click the checkbox in the top blue border to select all the competencies in the list.

   NOTE: The LMS does not create an assessment form that you can save and come back to later; it treats the assessment of each competency individually. Therefore, it is recommended that you choose a small number of competencies to assess at one time. You can repeat the selection process as many times as you need to in order to assess multiple competencies.

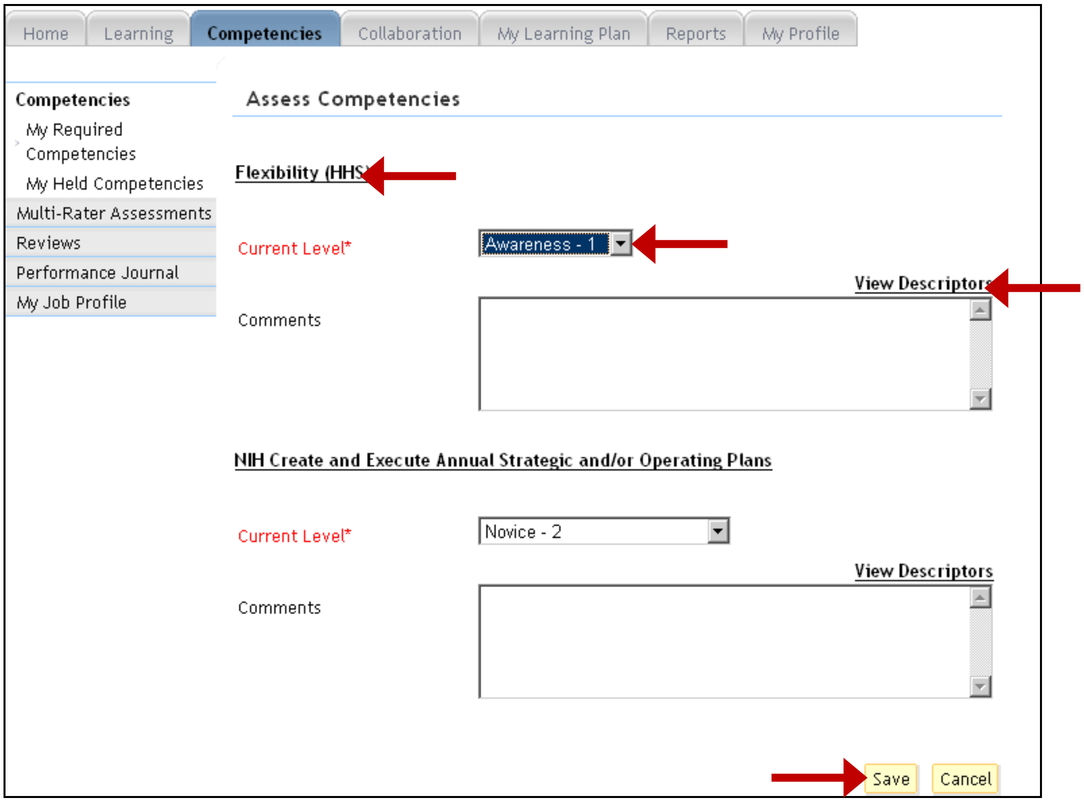
4. When you have selected the competencies you want to assess, click **New Self Assessment**.

5. The **Assess Competencies** screen will allow you to complete your self-assessment of the competencies you selected.

6. For more information about any competency, click its title.

7. In the **Current Level** field, click the drop-down menu and choose the level you think you currently hold for that competency. Click **View Descriptors** for descriptions to help you choose the level matching your current skill.

8. You may add comments to explain your assessment as well. Comments added can be viewed by your supervisor.
9. Click **Save** when you are finished.



10. Your self-assessment data is now part of your LMS record.

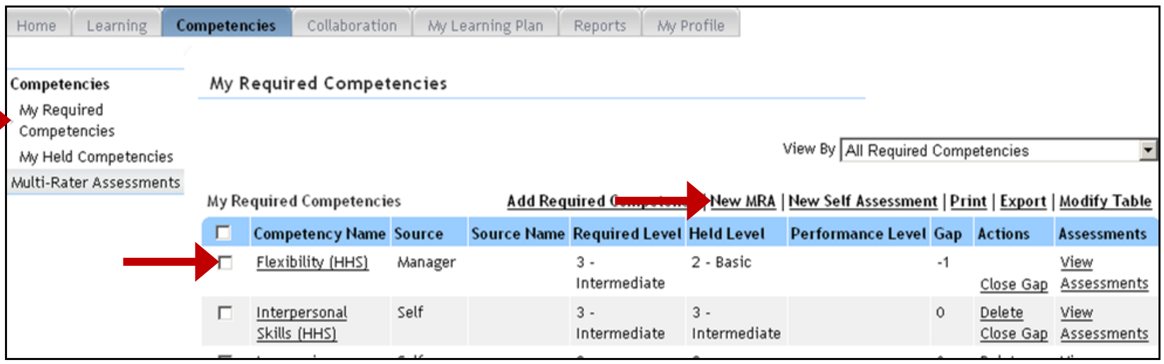
STEP-BY-STEP (INITIATE A COMPETENCY MULTI-RATER ASSESSMENT)

As a learner, you may ask others to assess your competencies through the LMS. An assessment conducted by your peers, your supervisor, customers, and yourself is called a Multi-Rater (also known as 360 Degree) Assessment. Feedback from others can be very helpful in accurately assessing your own competency levels. The LMS will calculate all assessments completed for a certain competency to give you one **Held Level** for that competency.

1. Log in to the LMS.

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

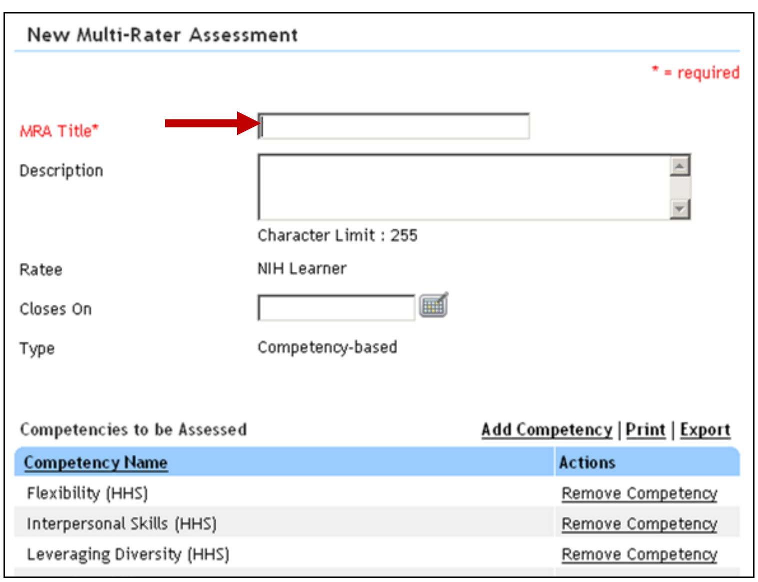
2. Click on the **Competencies** tab. **My Required Competencies** is the default screen.



3. Click the checkbox in front of any competency you want others to assess for you. You may click the checkbox in the top blue border to select all the competencies in the list.

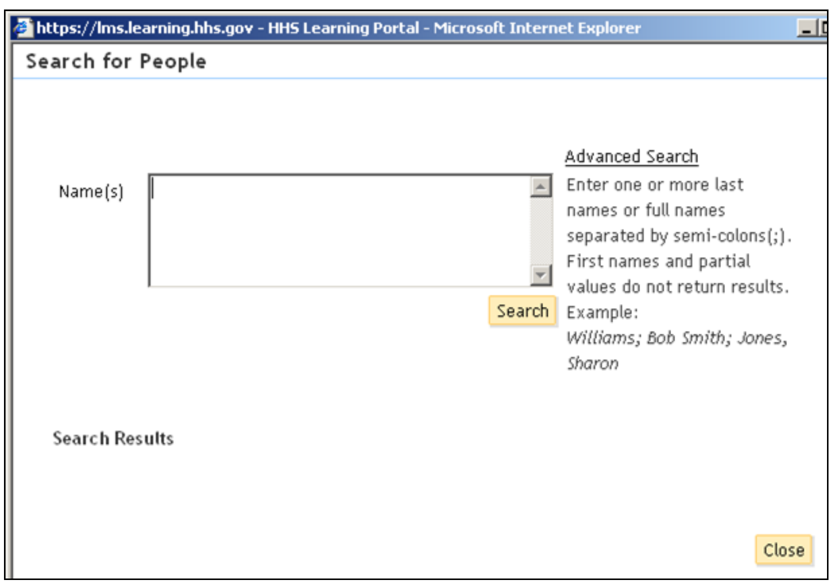
4. Click **New MRA**.

5. You will see a **New Multi-Rater Assessment** screen.



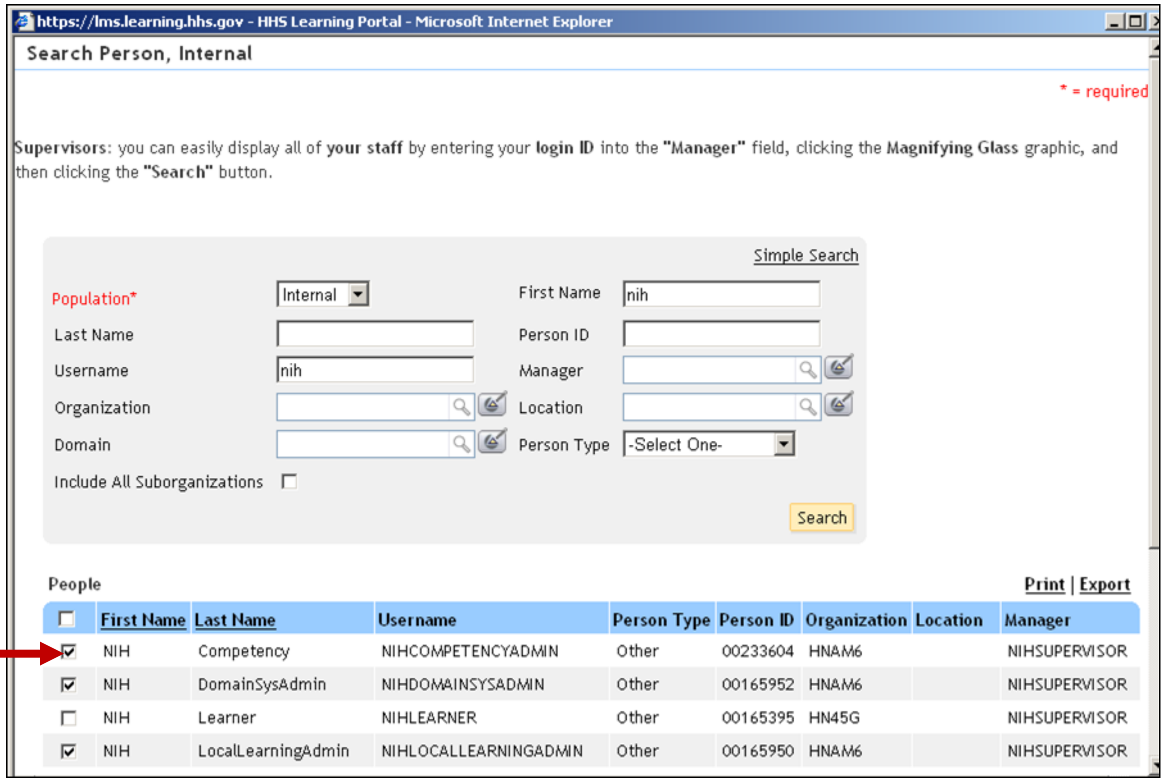
6. Type a meaningful title in the **MRA Title** field.
7. You may add a **Description** if desired, and you may either add a **Closes On** date to indicate when the assessment must be completed, or leave the date field blank to leave the MRA open for an indefinite amount of time.
8. Make sure the list of **Competencies to be Assessed** is correct. You may **Remove Competency** or **Add Competency** using the appropriate links.
9. Below the competencies list, you will indicate the people you want to include as **Raters**.

10. Click **Add Rater** to view a **Search for People** pop-up window.

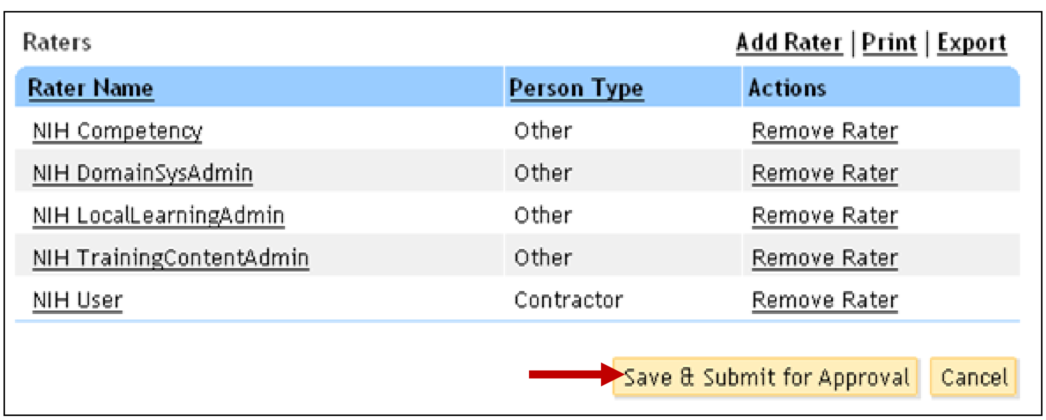


11. Type the person's legal first name and last name in the **Name(s)** box and click **Search**.

    NOTE: If you do not find the person you are looking for, use Advanced Search instead. Advances 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.

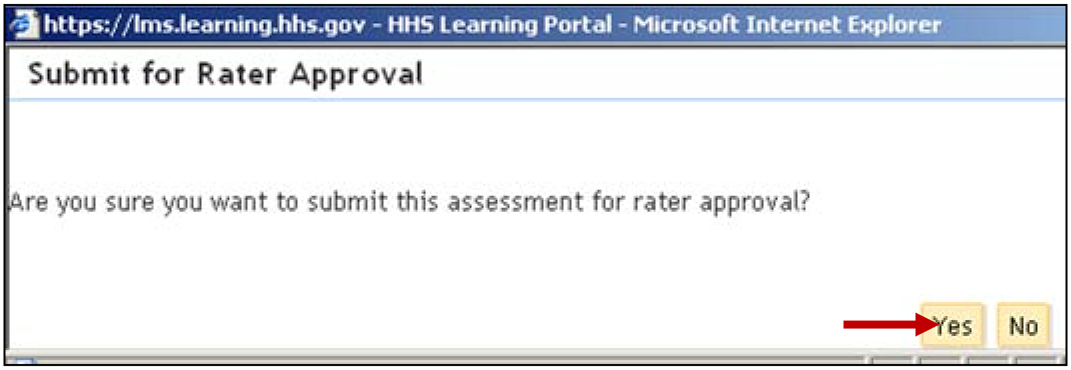


12. Click the checkbox next to each person in the **People** results list that you want to assess your competencies.
13. Scroll to the bottom of the pop-up window and click **Select**.
14. Repeat steps 10-13 as many times as necessary until everyone you want to include in your MRA is listed under **Raters**.



15. 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.

16. You will see a confirmation pop-up window; Click **Yes**.



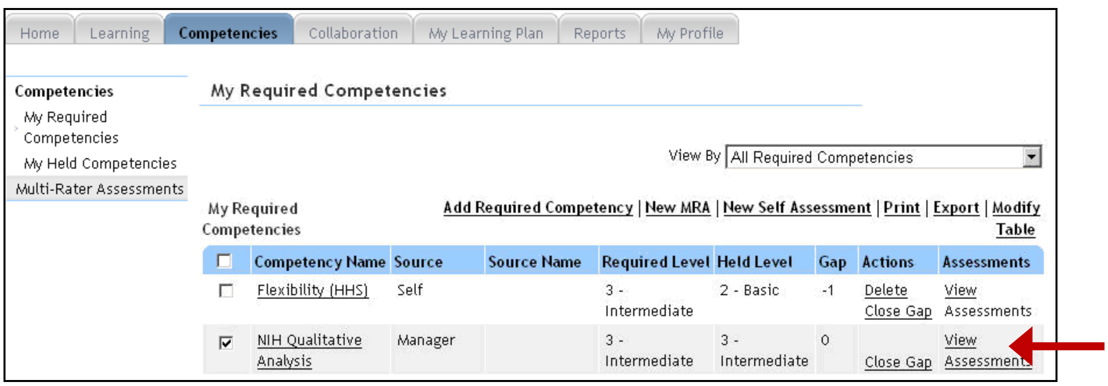
STEP-BY-STEP (VIEW COMPETENCY ASSESSMENTS)

Learners may view a record of assessments made of their own competencies.

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. Click on the **Competencies** tab. **My Required Competencies** is the default screen.
3. Click **View Assessments** in the same row as the desired competency.



4. You will see the **Competency Assessments** screen for that competency, listing all assessments that have been completed. The **Past Assessments** table includes **Date** of assessment, whether it was a manager, self, or other assessment (**Method**), the **Level** assessed, whether it is included in the current **Held Level** calculation (only the most recent assessment for each method is included), **Comments**, and the name of the person who completed the assessment (**Details**).

Competency Assessments: NIH Create and Execute Annual Strategic and/or Operating Plans

Competency Name	NIH Create and Execute Annual Strategic and/or Operating Plans
Description	Creates and executes strategic and/or operating plans for new fiscal years.
Current Assessed Level	2 - Novice

Past Assessments

Print | Export | Modify Table

Date	Method	Level	In Calculation?	Rating	Comments	Details
12/10/2008	Manager Assessment	3 - Intermediate	No			NIH Supervisor
01/26/2009	Self Assessment	3 - Intermediate	No			NIH Learner
02/02/2009	Manager Assessment	2 - Novice	Yes			NIH Supervisor
10/09/2009	Self Assessment	2 - Novice	Yes		Testing for comments	NIH Learner

5. Click the **Competency Name** to see more details about it. Under the **Details** column, click a person's name to see more details.

6. You may **Print** and/or **Export** the table of **Past Assessments** if desired.

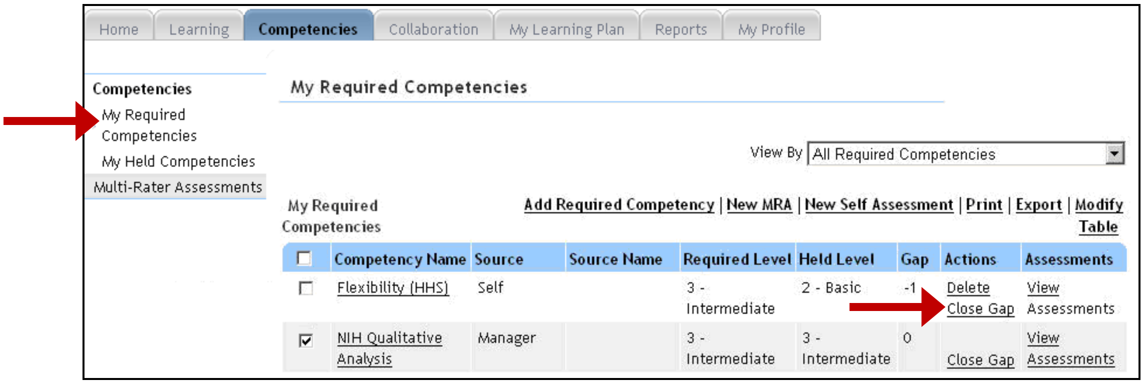
STEP-BY-STEP (FIND TRAINING TO CLOSE A COMPETENCY GAP)

1. Log in to the LMS.

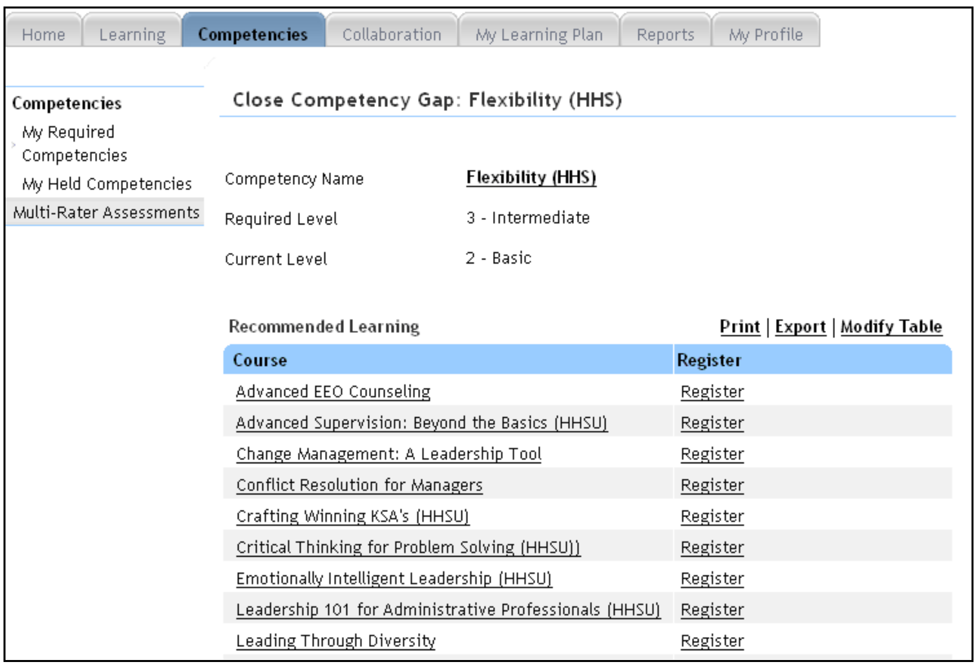
   NOTE: For instruction about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **Competencies** tab. **My Required Competencies** is the default screen.

3. Click **Close Gap** for the desired competency.



4. View the list of **Recommended Learning** to improve your skills for this competency.



5. Click the title of a **Course** to view more details, including a **Register** option.
6. You may also click **Register** next to the appropriate course without viewing the **Course** details.

   IMPORTANT: Your recorded competency level will not automatically improve after completing a course. If you feel you have increased your proficiency level for any competency, you should complete a new assessment to reflect the change.

STEP-BY-STEP (VIEW HELD COMPETENCIES)

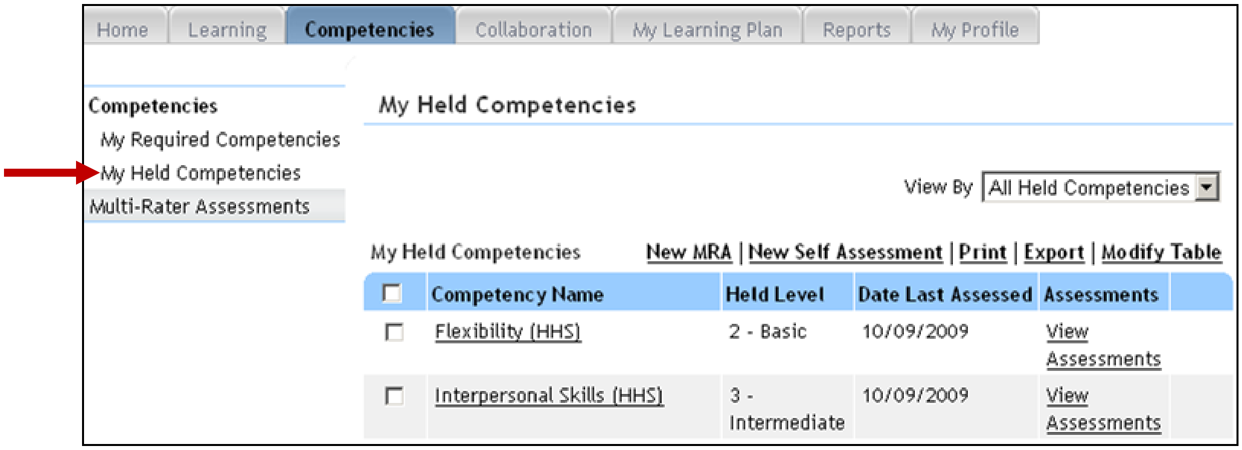
'Held' competencies are those for which an assessment exists in the LMS. The **My Held Competencies** screen allows you to view only the competencies you have assessed already. In addition to the date last assessed, many of the same functions are available to you. You may view the competency details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

1. Log in to the LMS.

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

2. Select the **Competencies** tab.

3. Click **My Held Competencies** from the menu item on the left-hand sidebar.



4. From **My Held Competencies** you can perform many of the same tasks you can perform from the **My Required Competencies** screen. Please see previous Step-by-Step procedures to **View Assessments**, initiate a **New MRA**, complete a **New Self Assessment**, etc.

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)

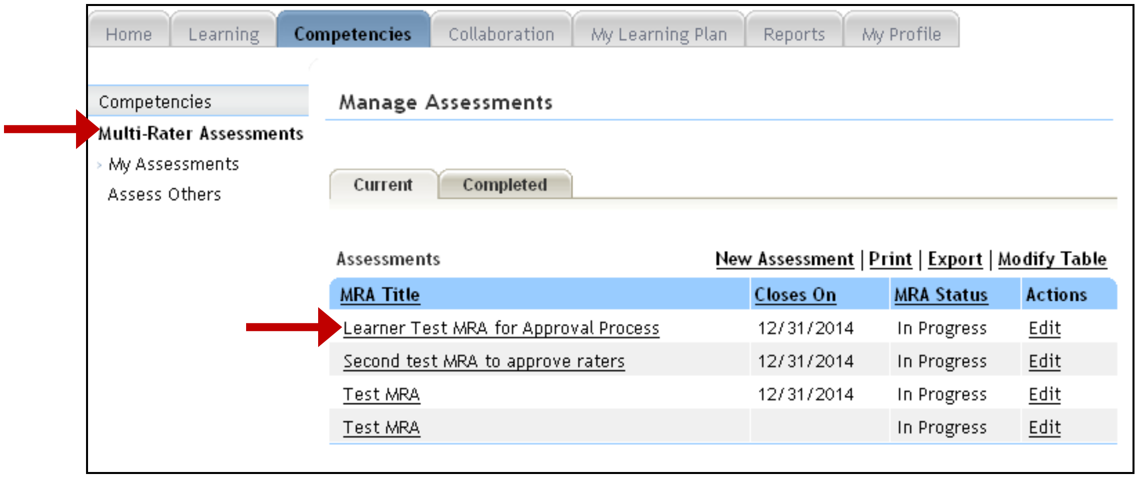
1. Log in to the LMS.

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

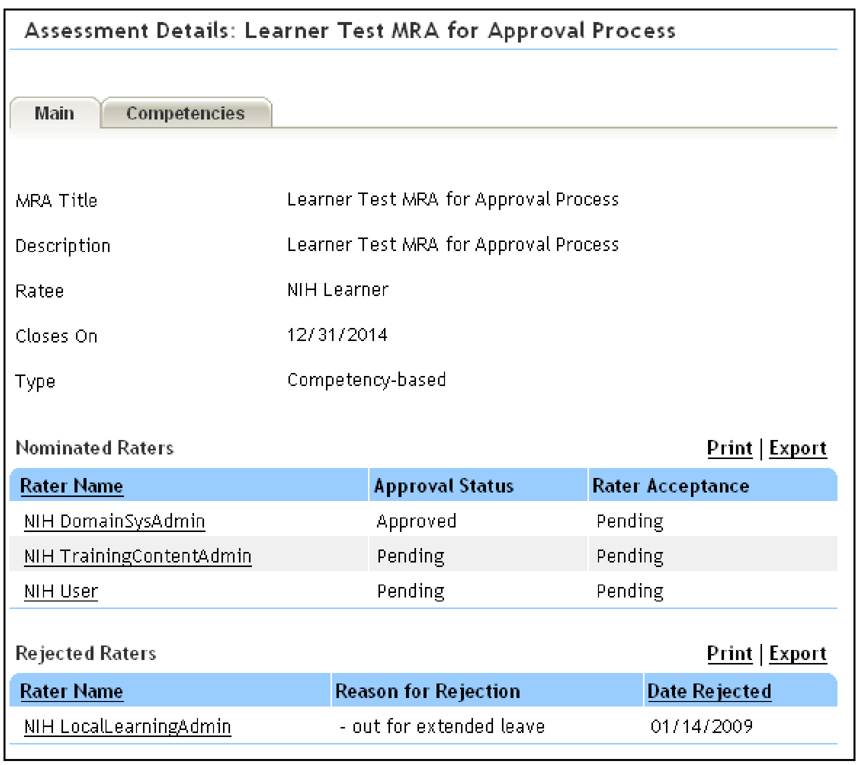
2. Select the **Competencies** tab.

3. Click on **Multi-Rater Assessments** from the menu item on the left-hand sidebar.

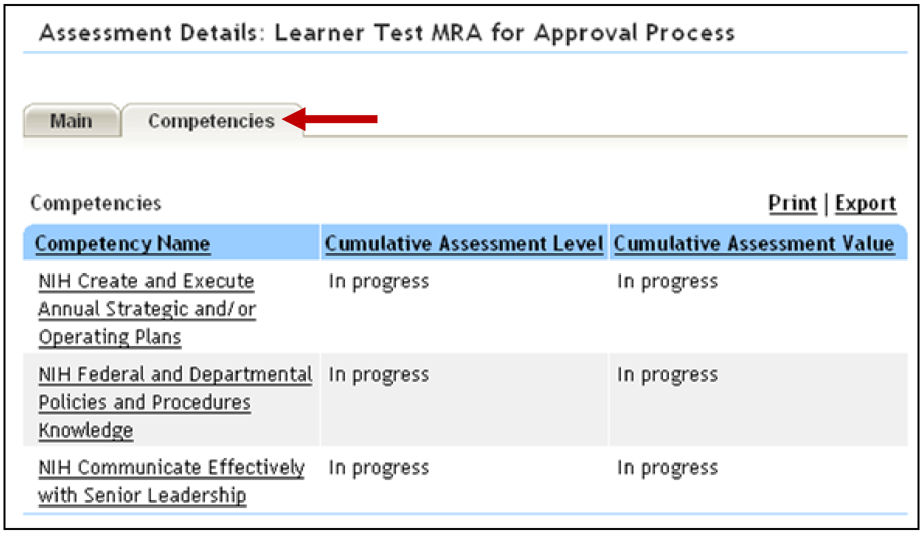
4. You will see the **Manage Assessments** screen. You may **Modify Table** to change the columns of data you see. You also have **Print** and **Export** options. Completed MRAs will be listed under the **Completed** tab.



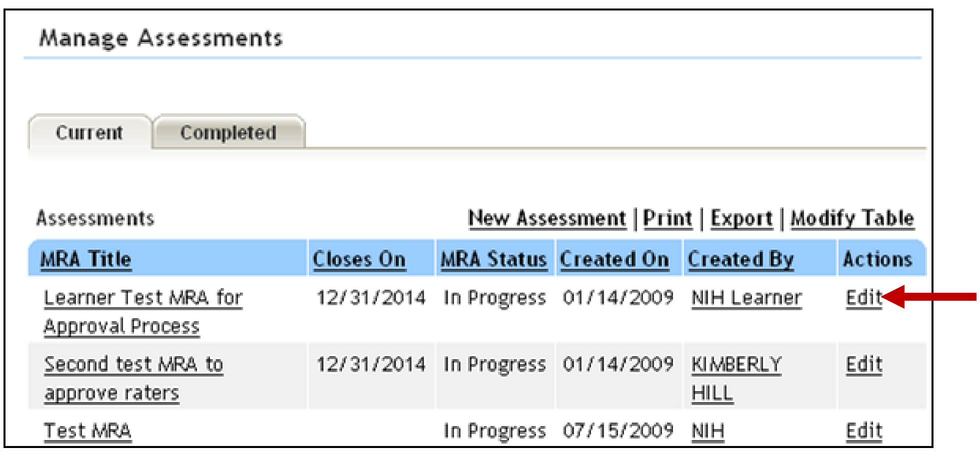
5. Click on an **MRA Title** to view the assessment details. You can see whether your **Nominated Raters** have been approved by your supervisor (**Approval Status**), and whether he/she has accepted their role as rater on your assessment (**Rater Acceptance**). You will also be able to see if your supervisor has rejected a rater you chose.



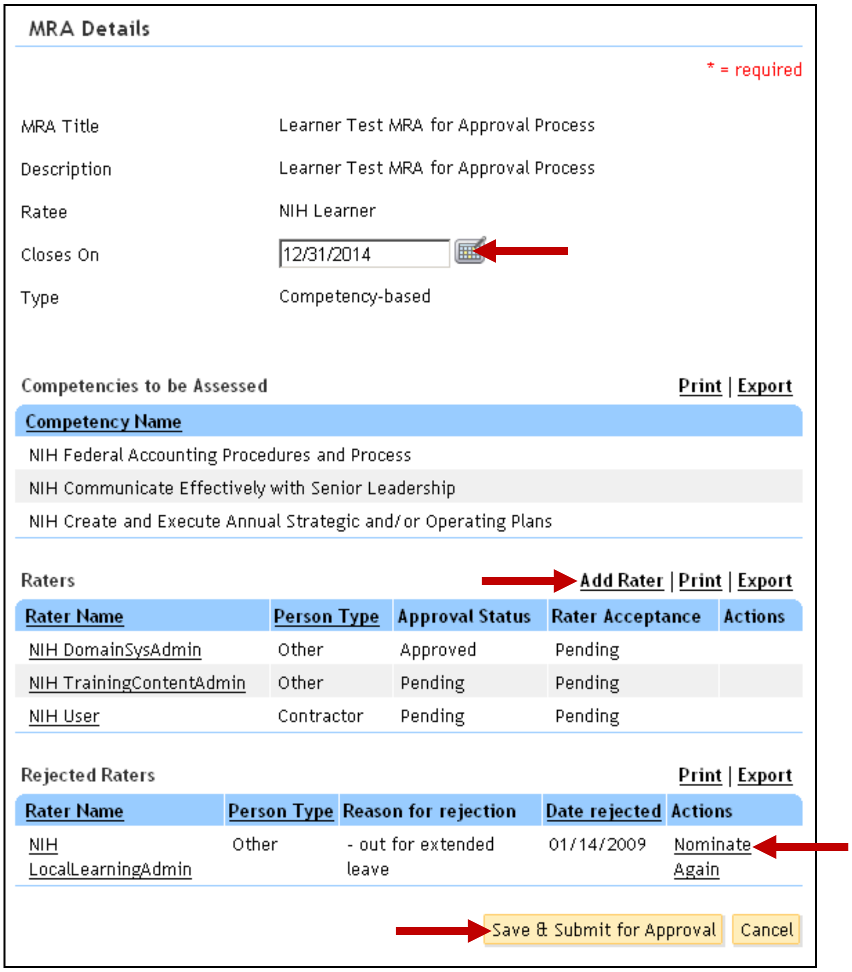
6. Select the **Competencies** tab to see the competencies included in your MRA, as well as their current assessment level. (You may click the title of any competency to see more details about it.)



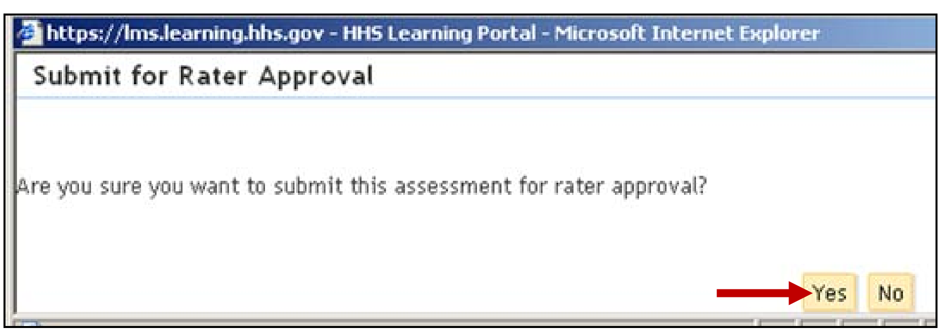
7. From the **Manage Assessments** screen, you may also **Edit** a **Current** MRA. Click **Edit** in the same row as the MRA you want to change.



8. You will see the **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.



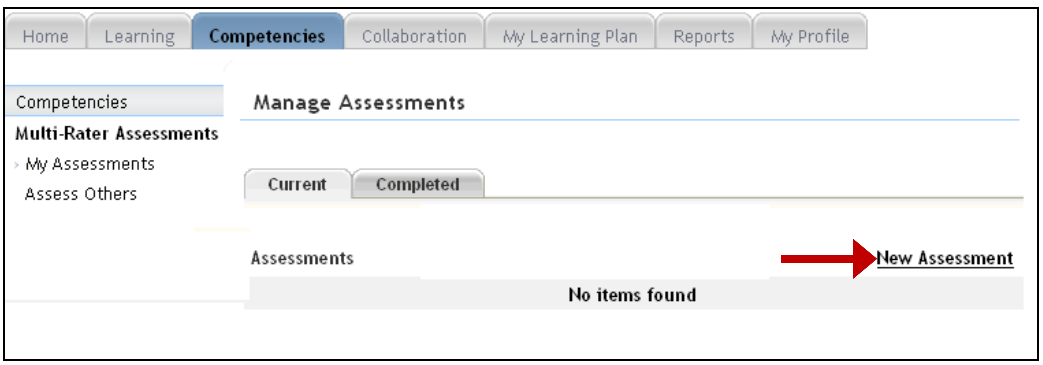
STEP-BY-STEP (INITIATE A COMPETENCY MULTI-RATER ASSESSMENT – METHOD 2)

You may also initiate an MRA from the Manage Assessments screen. The process is only slightly different from the process detailed in STEP-BY-STEP (INITIATE A COMPETENCY MULTI-RATER ASSESSMENT) above.

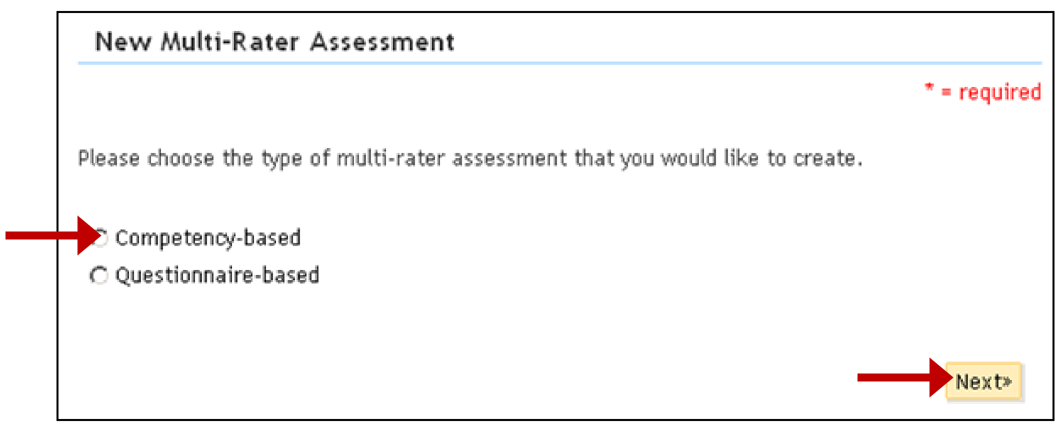
1. Log in to the LMS.

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

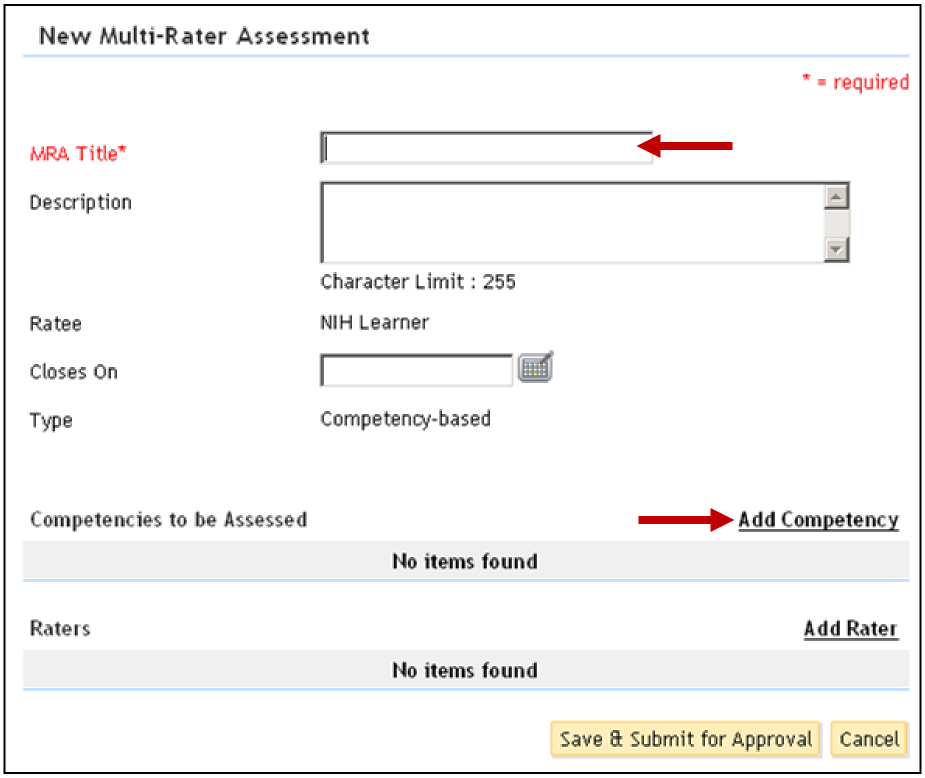
2. Select the **Competencies** tab.
3. Click on **Multi-Rater Assessments** from the menu item on the left-hand sidebar.
4. Click **New Assessment**.



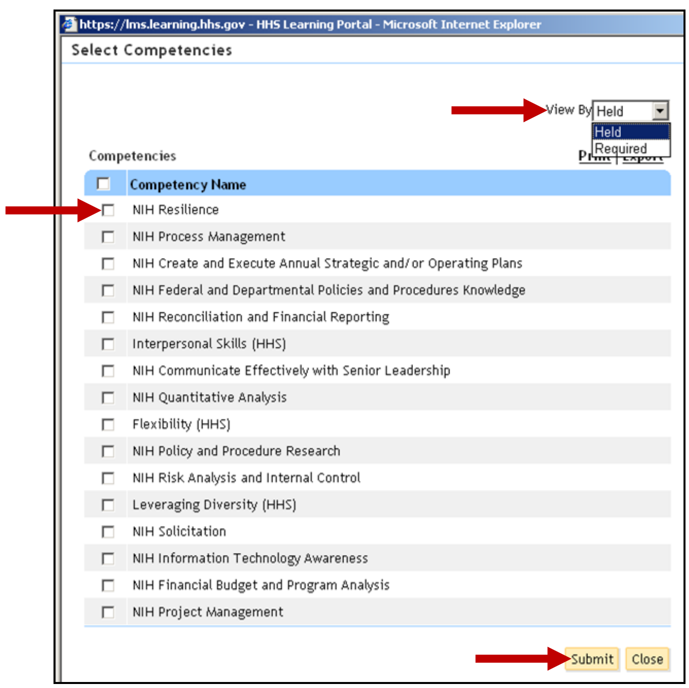
5. You will see the **New Multi-Rater Assessment** screen. Select **Competency-based**, then click **Next** to see the **New Multi-Rater Assessment** screen.



6. Type a meaningful title in the **MRA Title** field.
7. You may add a **Description** if desired, and you may either add a **Closes On** date to indicate when the assessment must be completed, or leave the date field blank to leave the MRA open for an indefinite amount of time.



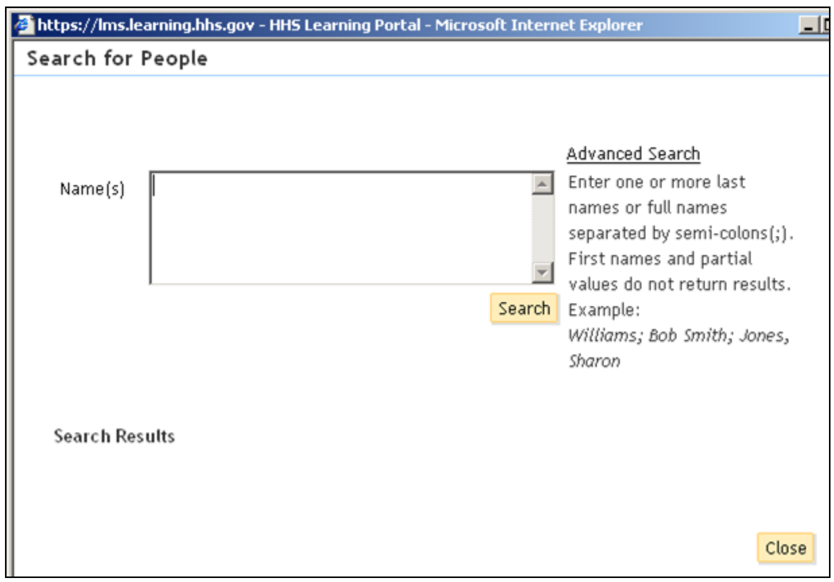
8. You must add the competencies you want to be assessed. Click **Add Competency**. You may filter the **Select Competencies** list to show your **Held** or **Required** competencies.



9. Click the checkbox in front of any competency you want to include. Click **Submit** when you are finished. The competencies you selected will be listed under **Competencies to be Assessed**.

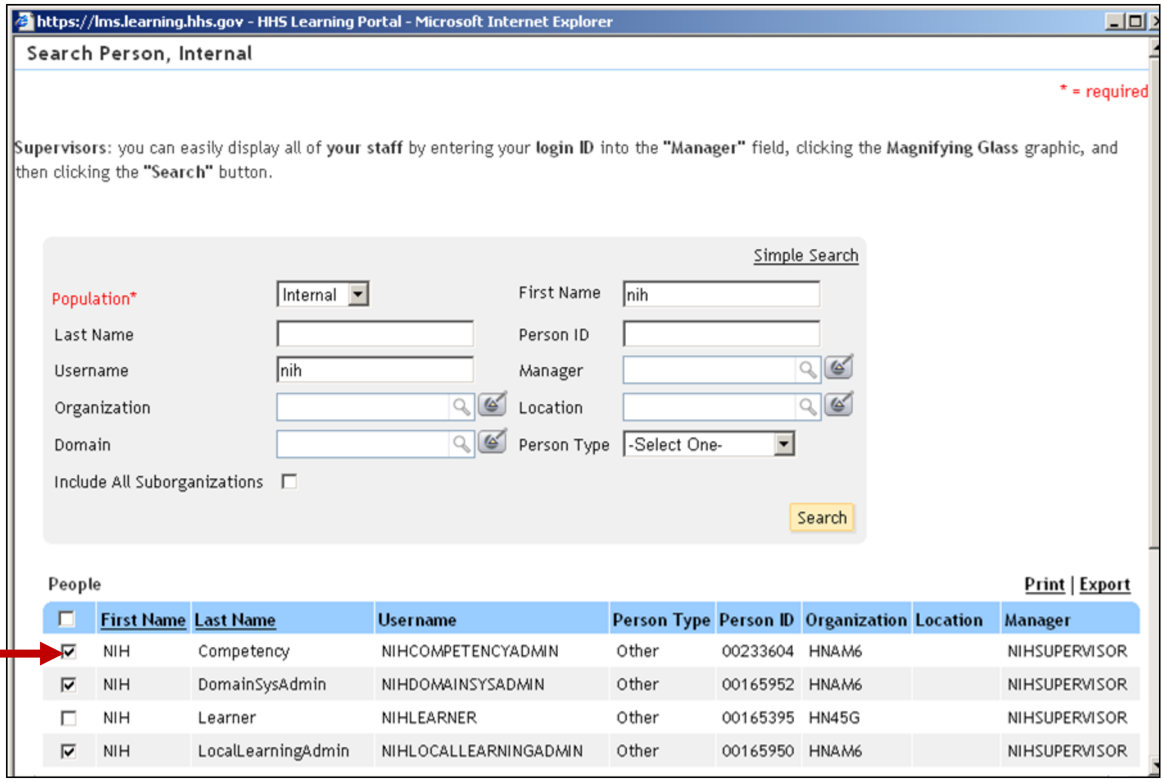
10. Below the competencies list, you will indicate the people you want to include as **Raters**.

11. Click **Add Rater** to view a **Search for People** pop-up window.

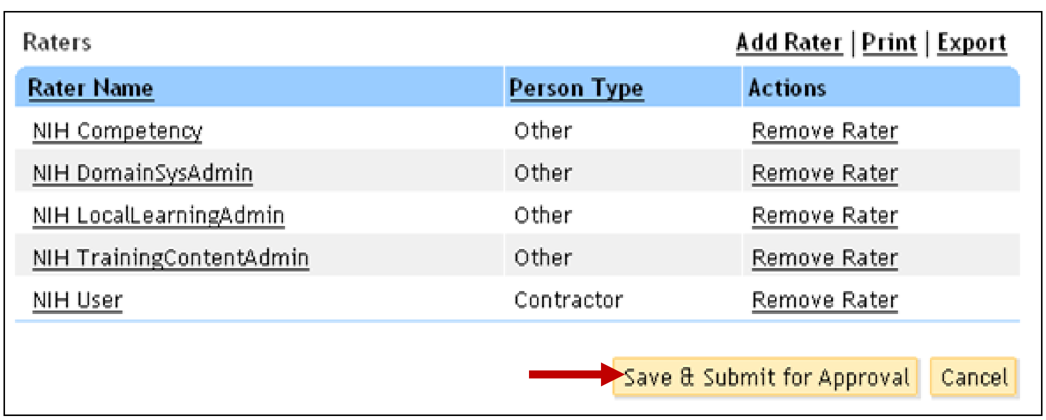


12. Type the person's legal first name and last name in the **Name(s)** box and click **Search**.

    NOTE: If you do not find the person you are looking for, use Advanced Search instead. Advances 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.

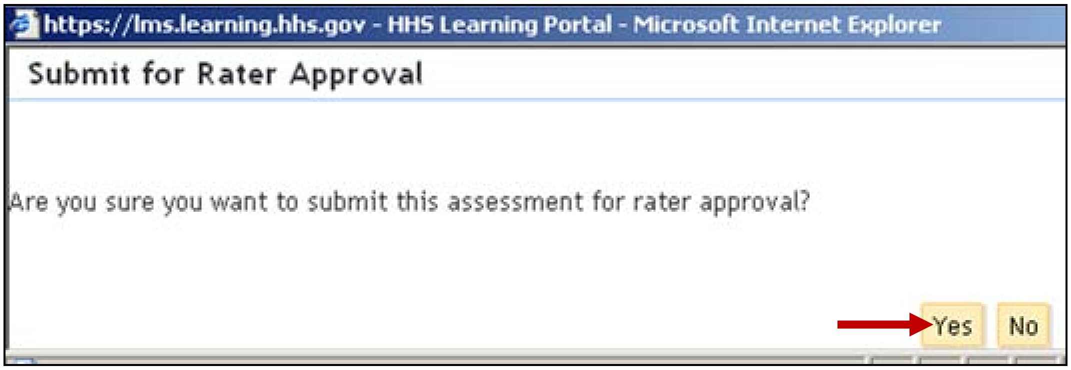


13. Click the checkbox next to each person in the **People** results list that you want to assess your competencies.
14. Scroll to the bottom of the pop-up window and click **Select**.
15. Repeat steps 10-13 as many times as necessary until everyone you want to include in your MRA is listed under **Raters**.



16. 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.

17. You will see a confirmation pop-up window; Click **Yes**.



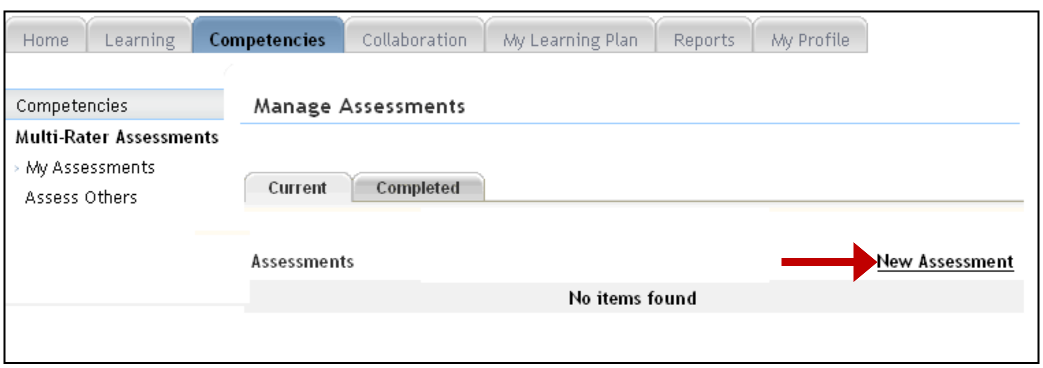
STEP-BY-STEP (INITIATE A QUESTIONNAIRE-BASED MULTI-RATER ASSESSMENT)

LMS administrators have the ability to build a questionnaire in the system and use it as an assessment tool. If an administrator has done this, you will be able to initiate a multi-rater assessment using the questionnaire instead of the pre-formatted competency-based assessment in the LMS.

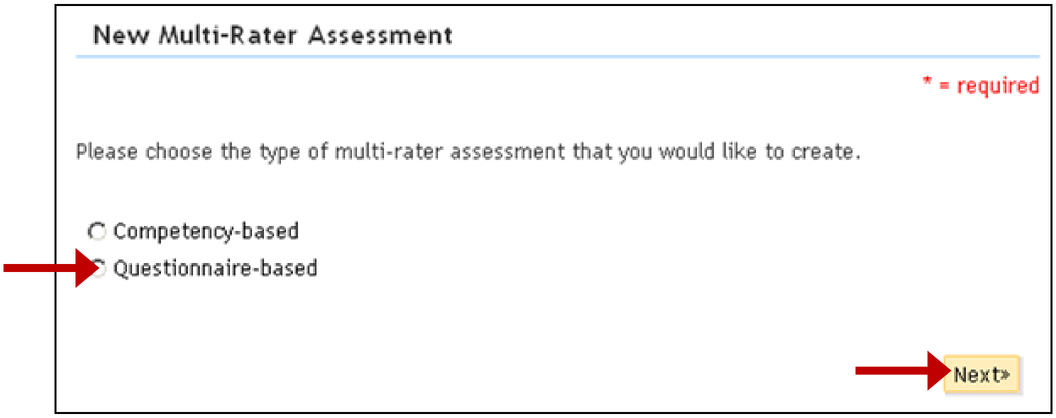
1. Log in to the LMS.

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

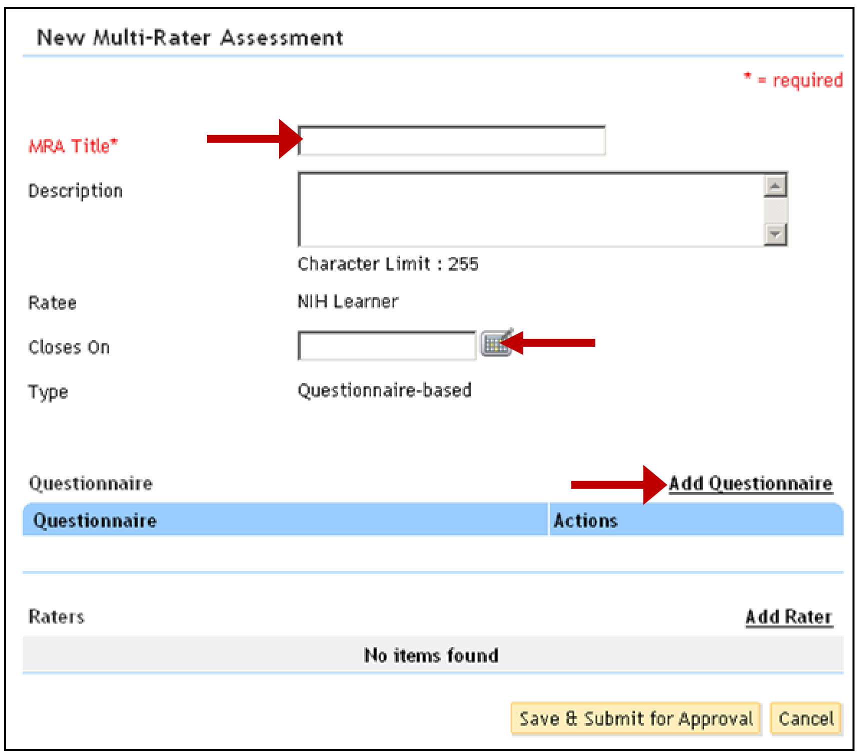
2. Select the **Competencies** tab.
3. Click **Multi-Rater Assessments** from the menu item on the left-hand sidebar.
4. Click **New Assessment**.



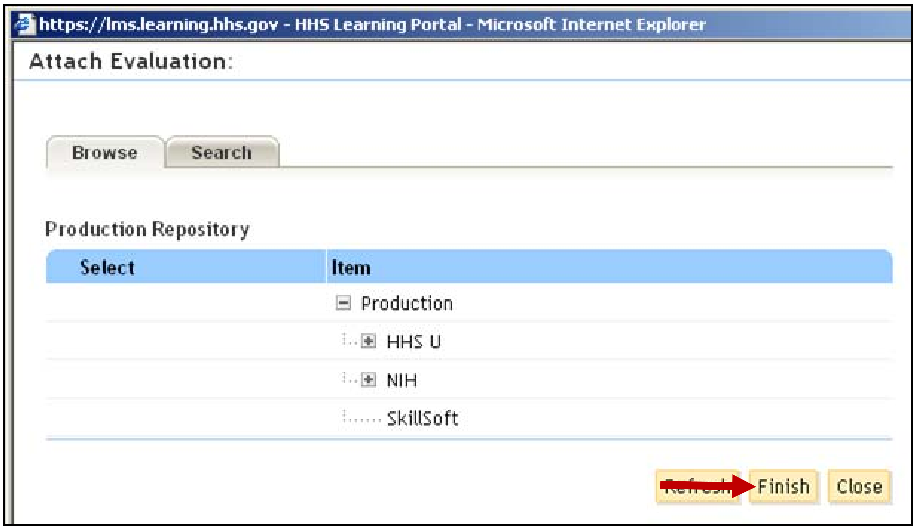
5. You will see the **New Multi-Rater Assessment** screen. Select **Questionnaire-based**, then click **Next** to see the **New Multi-Rater Assessment** screen.



6. Type a meaningful title in the **MRA Title** field.
7. You may add a **Description** if desired, and you may either add a **Closes On** date to indicate when the assessment must be completed, or leave the date field blank to leave the MRA open for an indefinite amount of time.



8. Click **Add Questionnaire**. You will see an **Attach Evaluation** pop-up window.



9. If you know where the questionnaire is stored, navigate the folder structure to find it. Select the radio button in front of the questionnaire and click **Finish** to return to the **New Multi-Rater Assessment** screen. Alternatively, you may use the **Search** tab to search for the questionnaire instead.

   IMPORTANT: If a selection radio button is not available in front of an item or it is not returned in your search list, then it has not been set up correctly by an administrator.

10. Begin with step 10 of STEP-BY-STEP (INITIATE A COMPETENCY MULTI-RATER ASSESSMENT – METHOD 2) to complete the new MRA and submit it for approval by your supervisor.

STEP-BY-STEP (COMPLETE COMPETENCY ASSESSMENTS FOR OTHERS)

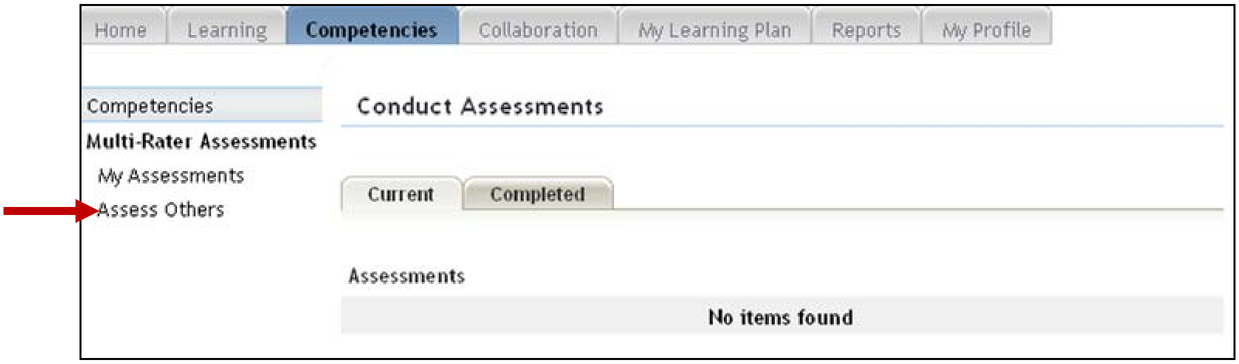
You could be named as a rater for someone else's multi-rater assessment. The following process details how to complete an assessment for someone else.

1. Log in to the LMS.

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

2. Select the **Competencies** tab.

3. Click **Multi-Rater Assessments**, then **Assess Others** from the menu items on the left.



4. If you have been approved as a rater for someone else, an assessment will be listed on the **Conduct Assessments** screen.
5. Each assessment will give you the opportunity to either reject you 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.
6. Assessments you have completed in the past will be found under the **Completed** tab.

MANAGING YOUR COMMUNITIES (THE COLLABORATION TAB)

The **Collaboration** tab allows you to access online communities within the HHS Learning Portal. You may also access information about organizations in the LMS.

COMMUNITIES

When you click on the **Collaboration** tab, the default view shows a list of communities you are already a member of (click the title to access details). You may also search for additional communities of interest to join.

These communities may be formed around a course or a common interest. Depending on how they are set up by the owner, you may be able to post documents to share with group members, participate in discussions with other group members, and contribute to Q&A and wiki pages.

There is also a Home Dashboard portlet that will take you directly to the Communities area.

My Communities

Name	Category	Owner
NIH OEODM American Disabilities Act (ADA) Update Seminar	General Interest	ROSE PRUITT
LMS Training Aids Effective June 5, 2009	Support	Wanda Meyers

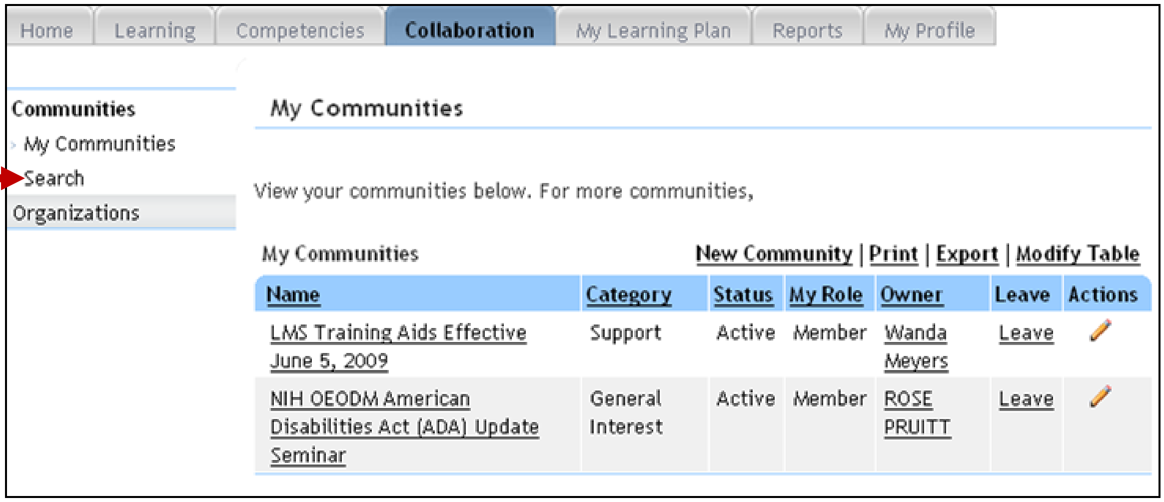
All Communities

STEP-BY-STEP (SEARCH FOR AND JOIN A COMMUNITY)

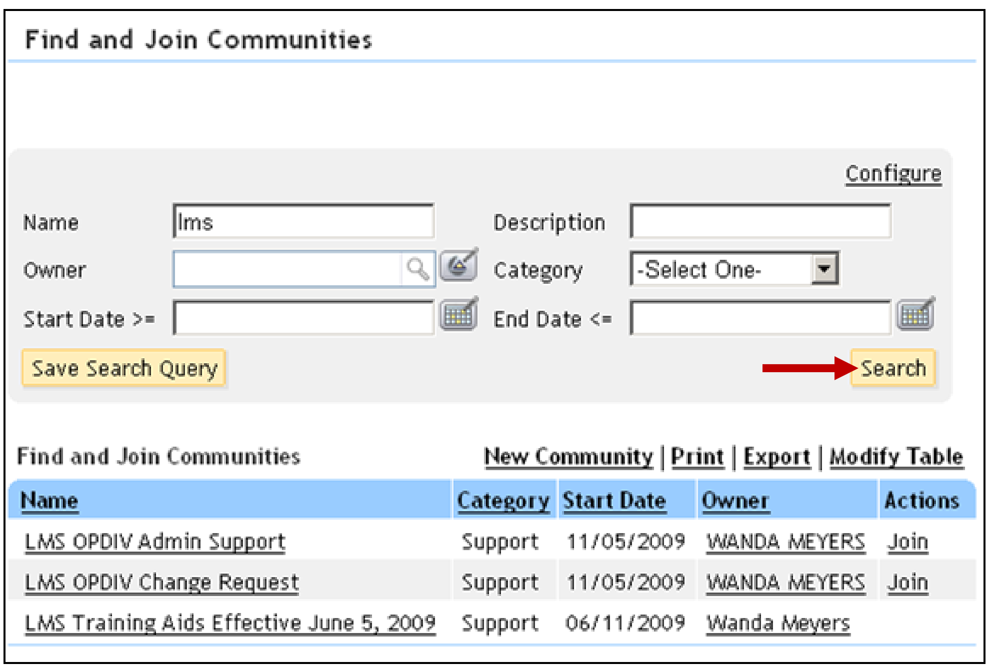
1. Log in to the LMS.

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

2. Select the **Collaboration** tab. **My Communities** is the default screen.

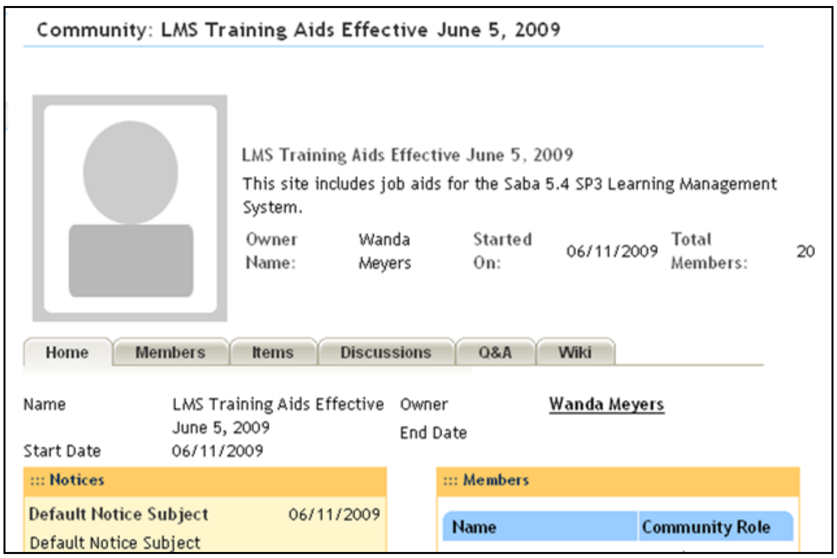


3. If you are already a member of any communities, the communities will be listed in the **My Communities** table.
4. To find more communities, click **Search** from the left menu.
5. On the **Find and Join Communities** screen, enter the appropriate search criteria for the community you are trying to find and click **Search**. (Clicking **Search** with no data in the search parameter fields will return a list of all existing communities that are available to you.)



6. Click the **Name** of a community to see more details. Click **Join** to become a member of the community.
7. Once you have joined a community, it will be listed in **My Communities**. Click the community's **Name** to access it.

8. Much like the Home Dashboard of the LMS, the home screen of a community has several quick link boxes and menu tabs for your use. Depending on how the owner has set up a community, the following options may be available to you:
    a. **Members** will list all the members of the community.
    b. **Items** will allow you to add attachments that show up on the community home page for other members to download.
    c. **Discussions** allows members to follow a threaded discussion around topics of interest.
    d. **Q&A** allows members to post questions and answer them for each other.
    e. **Wiki** allows members to contribute content for other members in a wiki format.

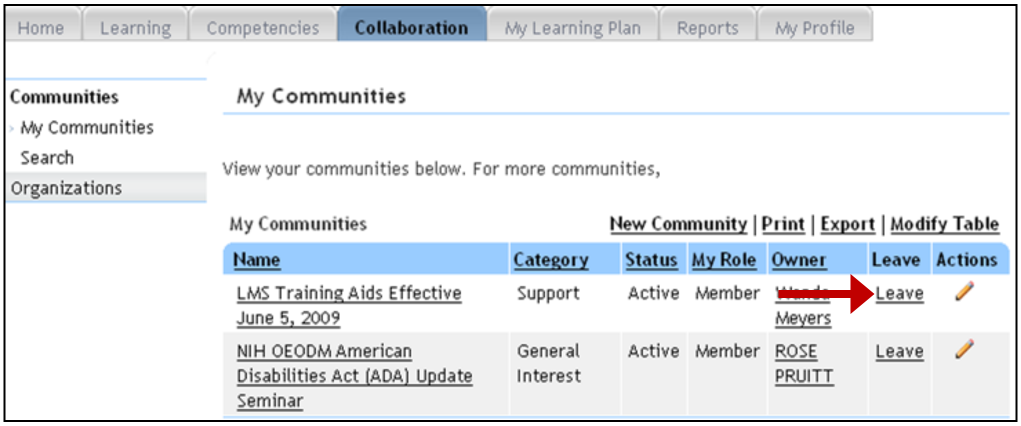


STEP-BY-STEP (LEAVE A COMMUNITY)

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. Click on the **Collaboration** tab. **My Communities** is the default screen.



3. Click **Leave** under the **Leave** column for the community you no longer want to be a member of.

4. Click **OK** to confirm you want to leave the community.

ORGANIZATIONS

The **Organizations** area allows you to view how organizations are organized by SAC code in the LMS. NIH SAC codes all begin with 'HN.' You may view information about your own organization, including other people (**Members**) in it. You may also **Browse Organizations** across the Department if desired.

MANAGING YOUR LEARNING PLAN (THE MY LEARNING PLAN TAB)

Under the **My Learning 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).

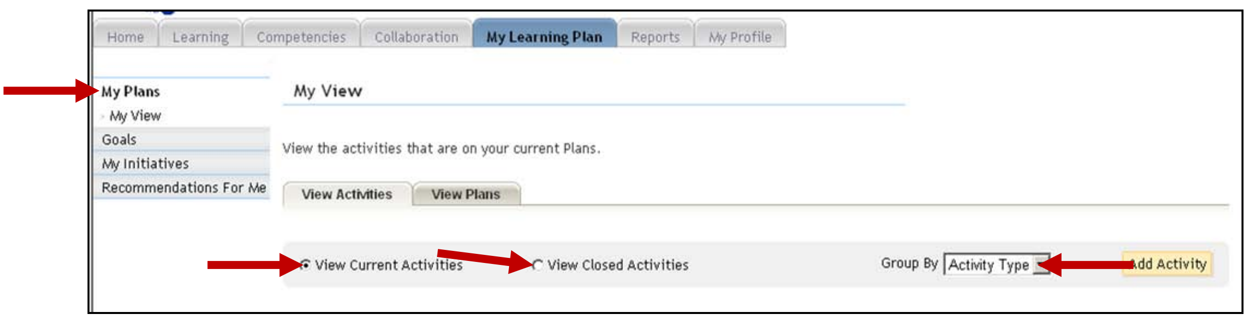
MY PLANS

STEP-BY-STEP (MANAGE YOUR LEARNING PLAN)

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. Click on the **My Learning Plan** tab.
3. **My Plans**, **My View** and the **View Activities** tab is the default screen and shows a list of items on your learning plan.
4. You may **View Current Activities** or **View Closed Activities** depending on which radio button is selected.



5. 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.

6. 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.

Curriculum — Print | Export | Modify Table

Name	Status	Due Date	Source	Plan Name	Actions
ASAM Action Officer Training	Assigned: 0% Completed	11/30/2009	NIH Learner	Learning Plan	Actions

Course — Print | Export | Modify Table

Name	Status	Due Date	Source	Plan Name	Actions
NIH-Intermediate Microsoft Word 2007	New	07/04/2009	NIH Learner	Learning Plan	Actions
Learning With Saba	In Progress	07/23/2009	NIH Supervisor	Learning Plan	Actions
Records Management for Everyone	In Progress	07/31/2009	NIH LocalLearningAdmin	Learning Plan	Actions
Creating and Analyzing an Operating Budget	New	09/25/2009	NIH Learner	Learning Plan	Actions
Alternative Dispute Resolution (ADR)	New		Test Prescriptive Rule	Learning Plan	Actions

Goal — Print | Export | Modify Table

Name	Status	Due Date	Source	Plan Name	Actions
Internet Multi-Media Course	On Track: 90% Completed	11/30/2009	NIH Learner	Learning Plan	Actions
Test Goal	New: 0% Completed	11/30/2009	NIH LocalLearningAdmin	Learning Plan	Actions

7. 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.

Curriculum — Print | Export | Modify Table

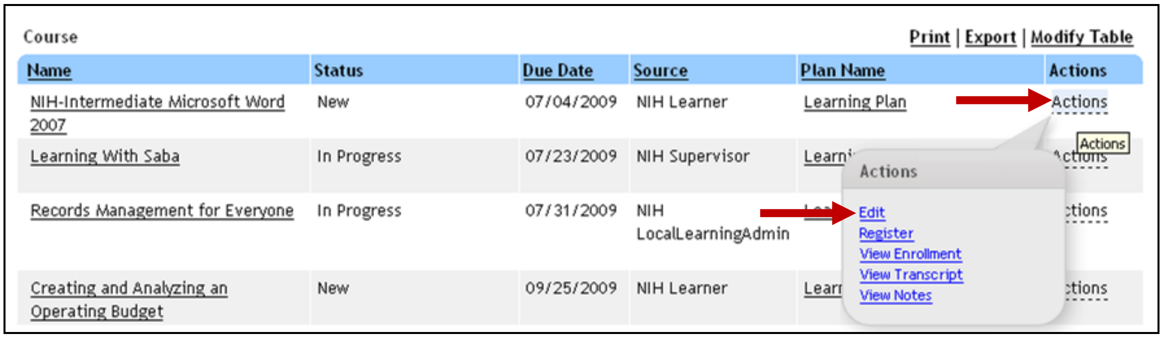
Name	Status	Due Date	Source	Plan Name	Actions
ASAM Action Officer Training	Assigned: 0% Completed	11/30/2009	NIH Learner	Learning Plan	Actions

Actions
Start Registration
View Notes

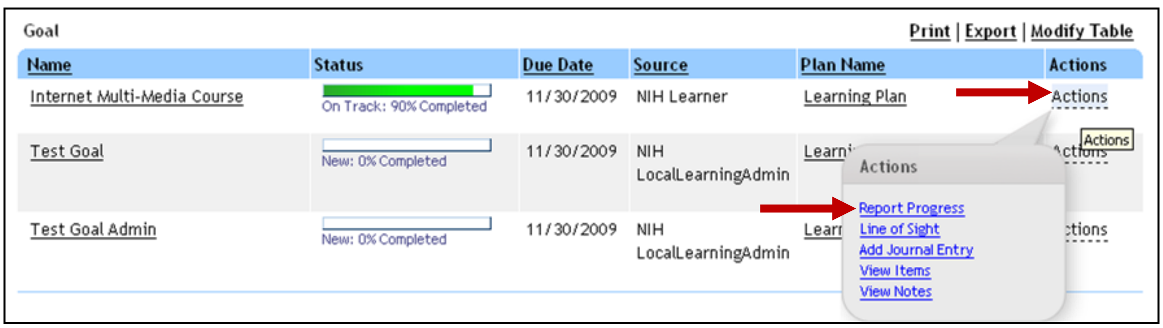
Course — dify Table

Name	Status	Due Date	Source	Pla	ctions
NIH-Intermediate Microsoft Word 2007	New	07/04/2009	NIH Learner	Lea	Actions

b. Courses will allow you to **Edit** notes or the due date, **Register** for the course, utilize quick links to **View Enrollments** or **View Transcript** (your own), or **View Notes** associated with the course.



c. Goals are used to add items to your learning plan that are not LMS catalog items, such as a course or certification administered by an organizations outside of HHS. From the learning plan, Goal items allow you to **Report Progress** you have made toward your goal (Remember, these are not items tracked through the LMS.) and **View Notes** associated with the goal. (The other options in the pop-up menu are more applicable to the Performance Module, which NIH is not using.)



STEP-BY-STEP (ADD AN ACTIVITY TO YOUR LEARNING PLAN)

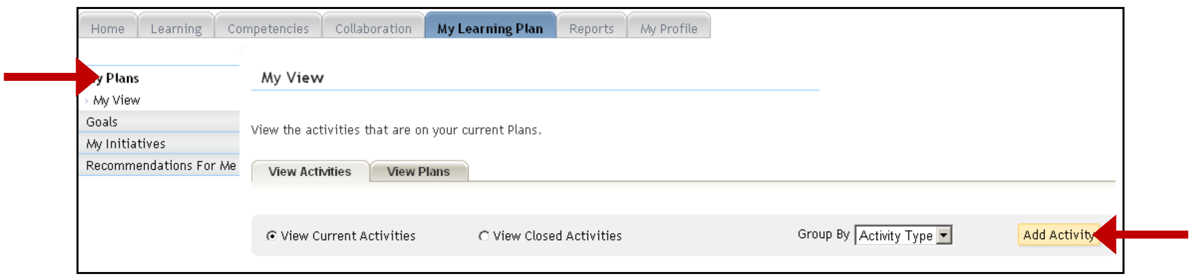
1. Log in to the LMS.

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

2. Click on the **My Learning Plan** tab.

3. **My Plans**, **My View** and the **View Activities** tab is the default screen and shows a list of items on your learning plan.

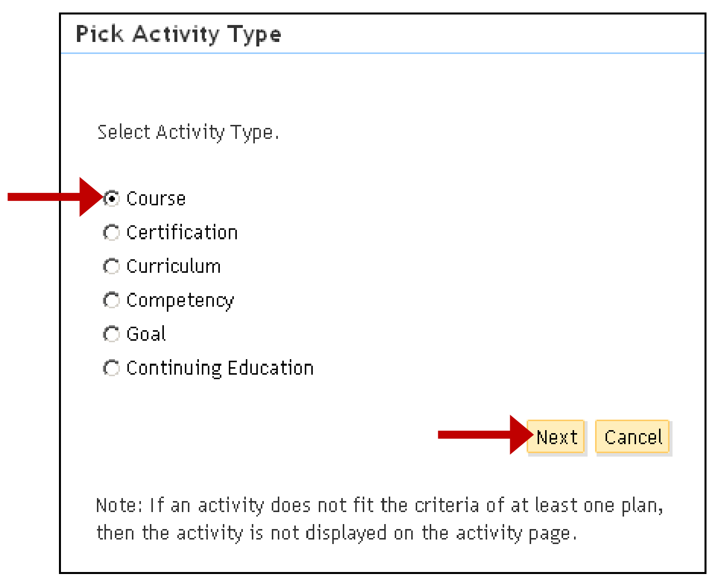
4. Click **Add Activity**.



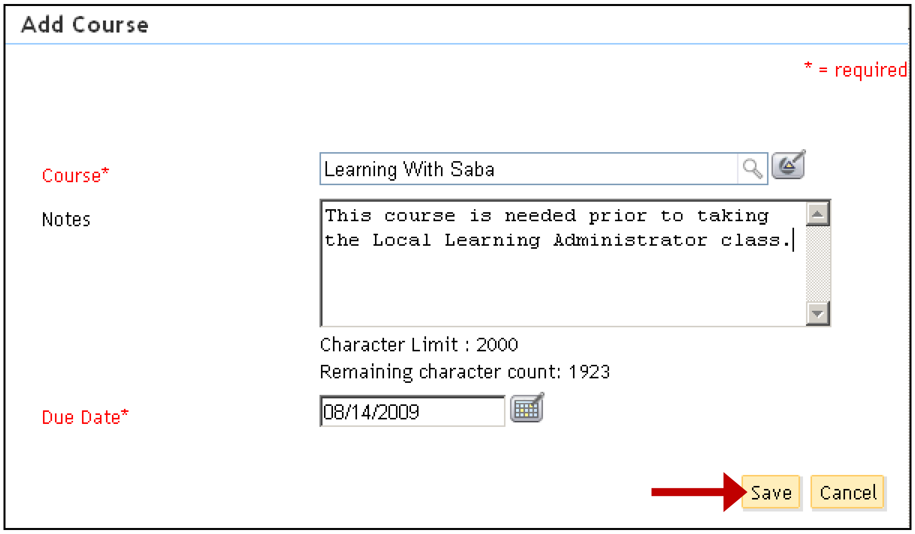
5. You will see a pop-up window listing the types of activities you may add to your learning plan in the LMS. Select an **Activity Type** (such as **Course**, for example).

   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.) Use **Goal** 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.

6. Click **Next**.

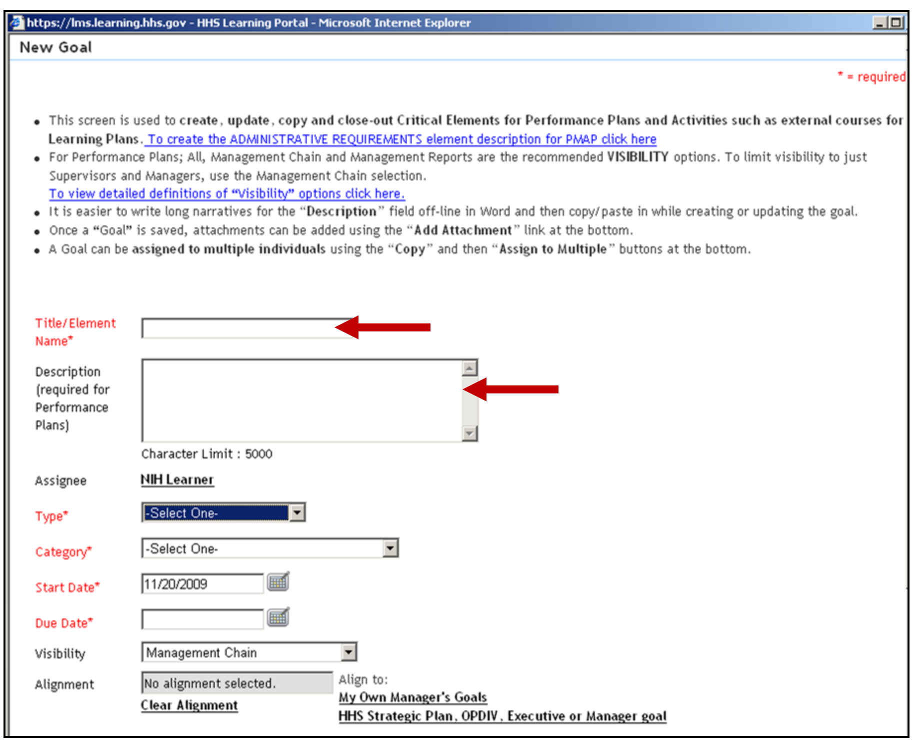


7. The type of activity you select will determine which pop-up window you see next. Fill in required information and then click **Save**. (See search section under appropriate topic for details on finding a **Certification**, **Curriculum**, or **Continuing Education** requirement.)

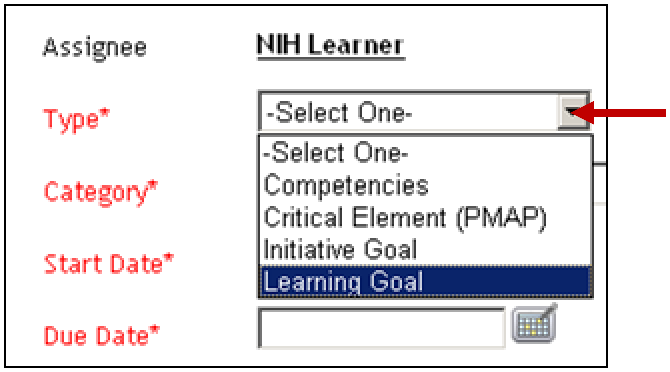


IMPORTANT: All fields in red with an asterisk (*) require data in order to save changes.

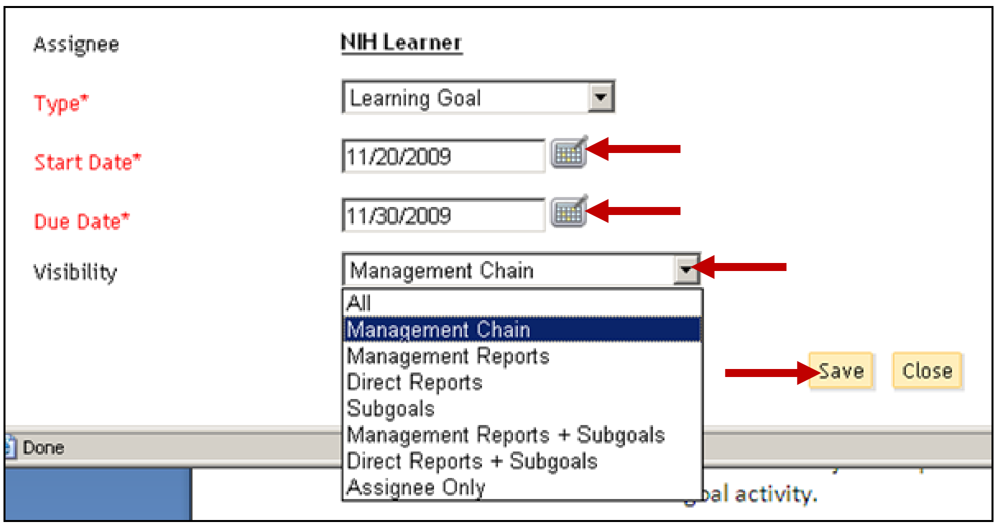
a. If you choose to add a **Goal**, the **New Goal** window will appear. Many of the instructions and options in this window apply to the Performance Module and should NOT be used by NIH. Add a **Title** for the goal you are adding, and a **Description** if desired.



b. In the **Type** field, you should select **Learning Goal**.



c. The screen will refresh with adjusted options. Designate the **Start Date** and **Due Date** of the goal activity.



d. In the **Visibility** field, choose the appropriate option from the drop-down menu, then click **Save**.

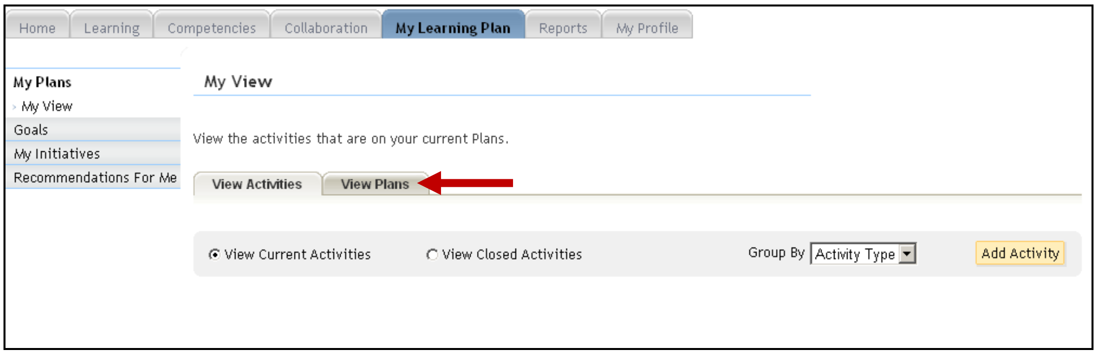
8. The item you added will now appear in your **View Activities** list.

STEP-BY-STEP (DELETE AN ACTIVITY FROM YOUR LEARNING PLAN)

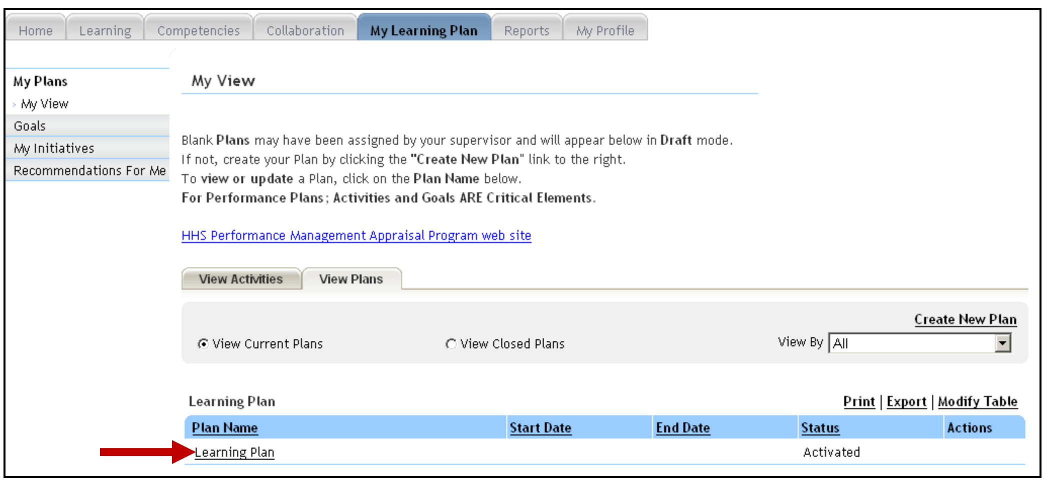
1. Log in to the LMS.

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

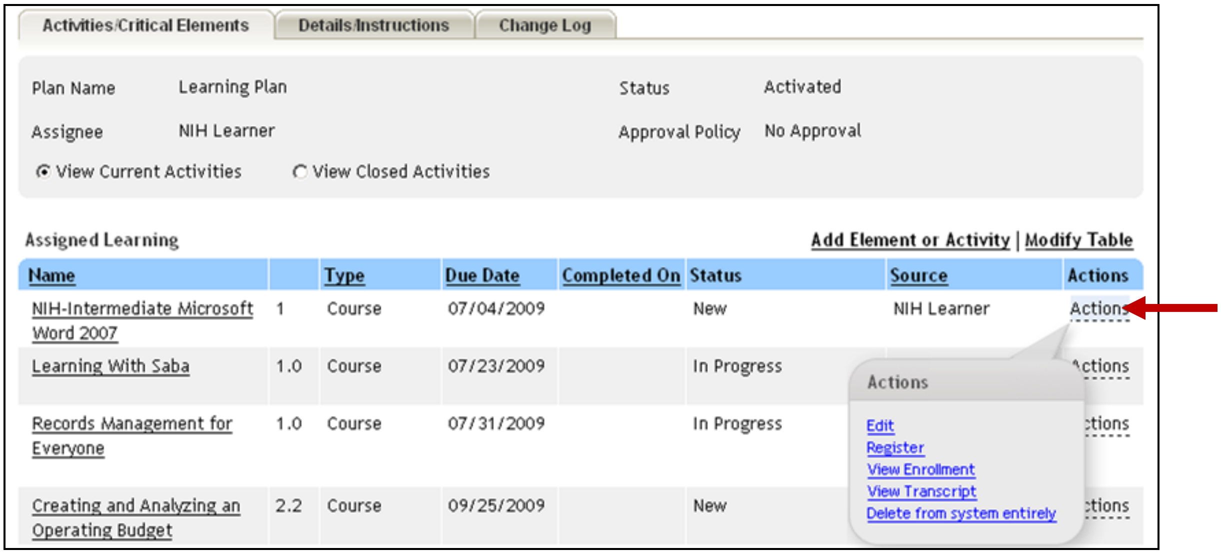
2. Click on the **My Learning Plan** tab.
3. **My Plans**, **My View** and the **View Activities** tab is the default screen and shows a list of items on your learning plan.
4. Select the **View Plans** tab.



5. Click on **Learning Plan**.

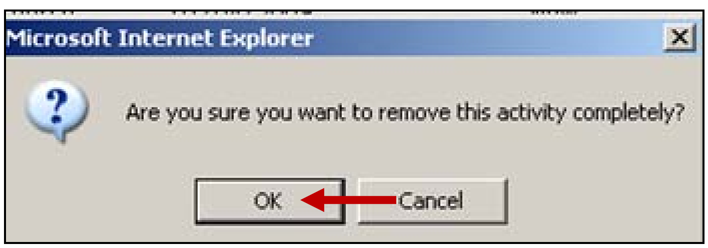


6. You will see a **Plan Details: Learning Plan** screen with a list of all items on your learning plan. Hold your cursor over **Actions** in the row of the item you want to delete.

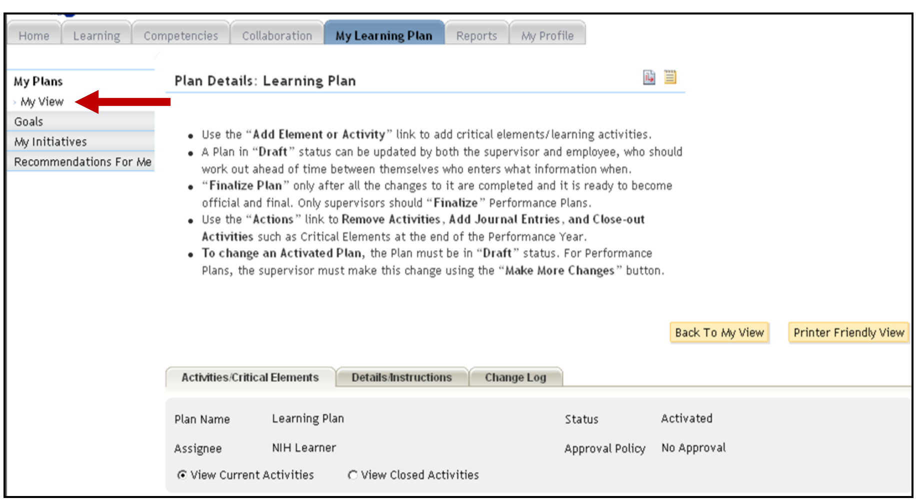


7. You will see a pop-up menu with several options relevant to that specific learning plan item. Select **Delete from system entirely** to remove the learning plan item from your learning plan.

8. You will be asked to confirm that you want to delete the item. Click **OK**.



9. The activities list will refresh without the item you deleted. Click **My View** to return to the main learning plan screen.



GOALS

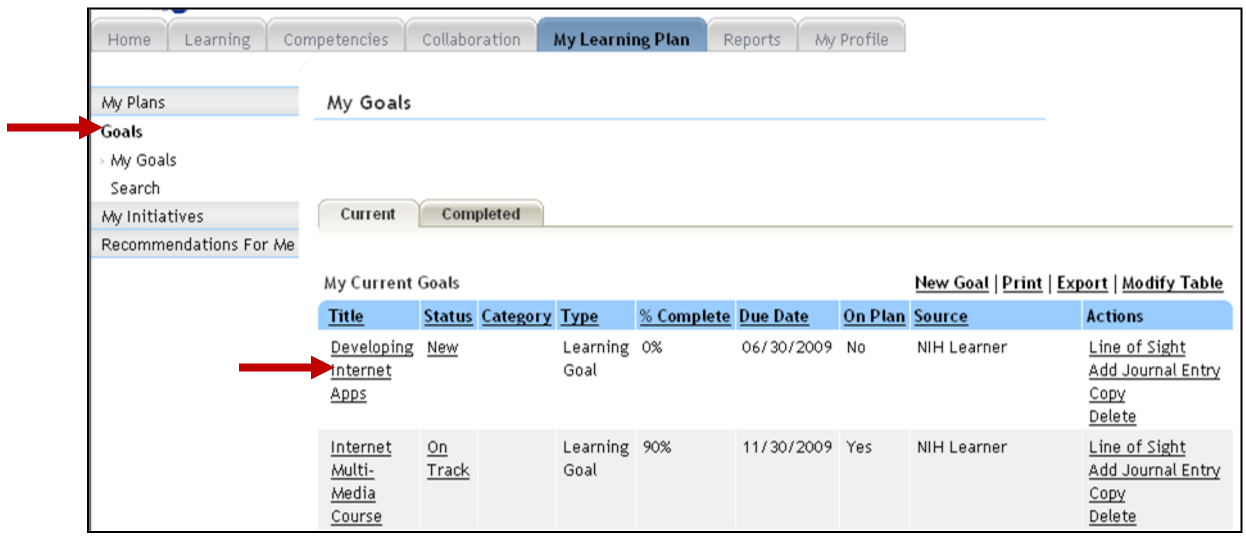
The **Goals** menu allows you to isolate a list of goals – only – from your learning plan. You may manage your goals from this functional area.

STEP-BY-STEP (EDIT A GOAL)

1. Log in to the LMS.

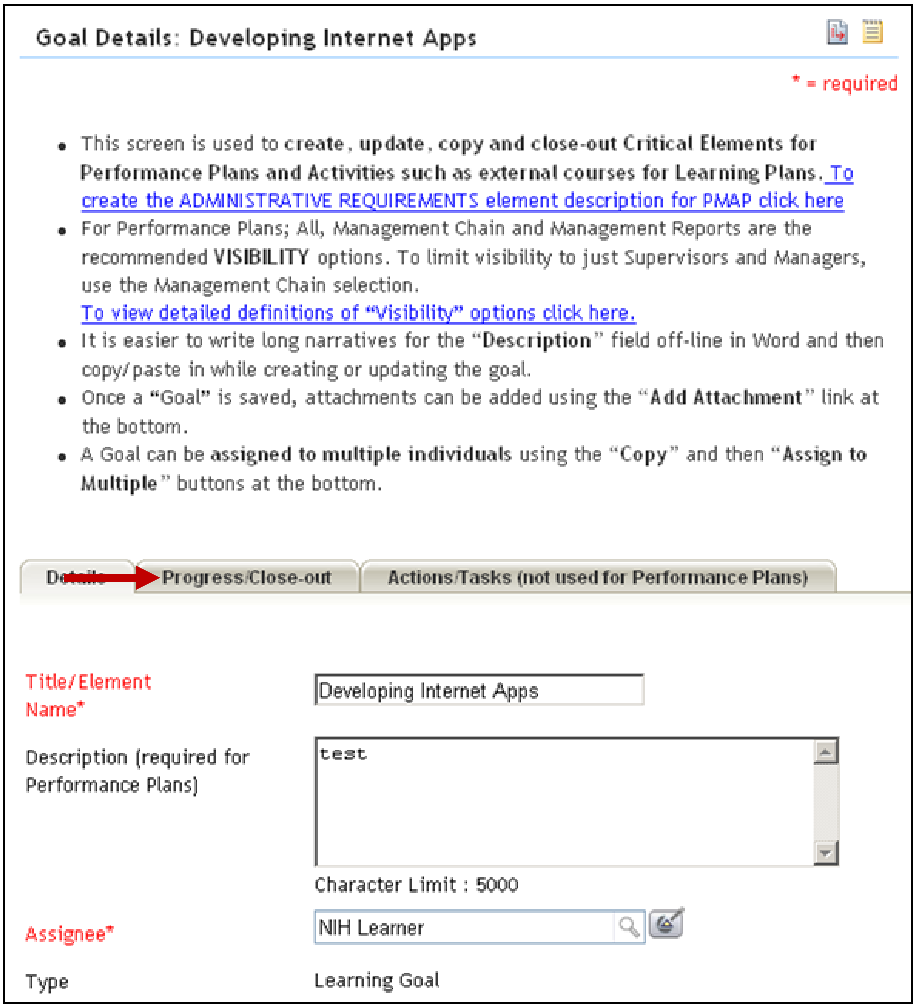
   NOTE: For instruction about logging in, see the STEP-BY-STEP (LOG-IN TO THE HHS LEARNING PORTAL)

2. Click on the **My Learning Plan** tab.
3. Select **Goals** from the left menu bar. **My Goals** is the default screen.



4. Clicking on the **Title** of a goal will allow you to edit the details of that goal. You may update the **Due Date**, **Visibility**, and other details.

NOTE: The instructions on this screen relates primarily to the Performance Module, which NIH is not using.



5. The **Progress/Close-out** tab will allow you to update the **Status** of the goal and the **Percentage Completed**.

MY INITIATIVES

This area is not currently being used at NIH.

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 **View Recommendations** screen. You will then have the option to register for a recommended course or ignore, as desired.

CREATING 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 generated, exported, printed, emailed and subscribed to if desired.

The Reports area is primarily for administrators at this time. Data accessible through reports for learners can be accessed much more easily through the previous sections of this guide.

MANAGING YOUR PROFILE (THE MY PROFILE TAB)

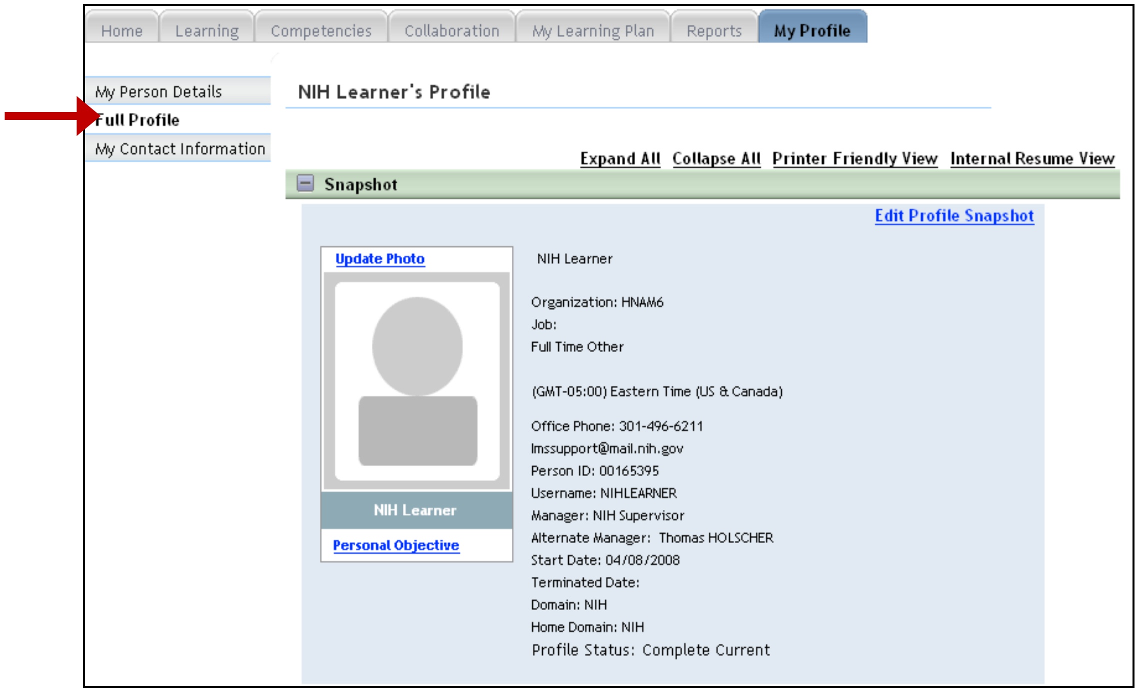
Under the **My Profile** tab, learners can see what their personal details, manager, direct reports, and also what roles are assigned. The learner can get to:

- **My Person Details** – The information in this section is almost all coming from automated data feeds from CapitalHR 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://trainingcenter.nih.gov/LMS-Admins-Lists.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.
- **My Address** – Your address information is populated from CapitalHR/NED. If it is incorrect, you should talk to your AO about correcting it in the source system.
- **My Job Profile** – This screen provides another view of your profile information. The 'Full Profile' tab also shows your current job information, competencies summary, licenses and certifications, and languages.

STEP-BY-STEP (VERIFYING YOUR USER PROFILE)

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. Select the **My Learning** role in the drop-down **Go To** menu. If there is no drop-down **Go To** menu, then this is the default screen.
3. Click on the **My Profile** tab.
4. Click **Full Profile** from the menu item on the left-hand sidebar.

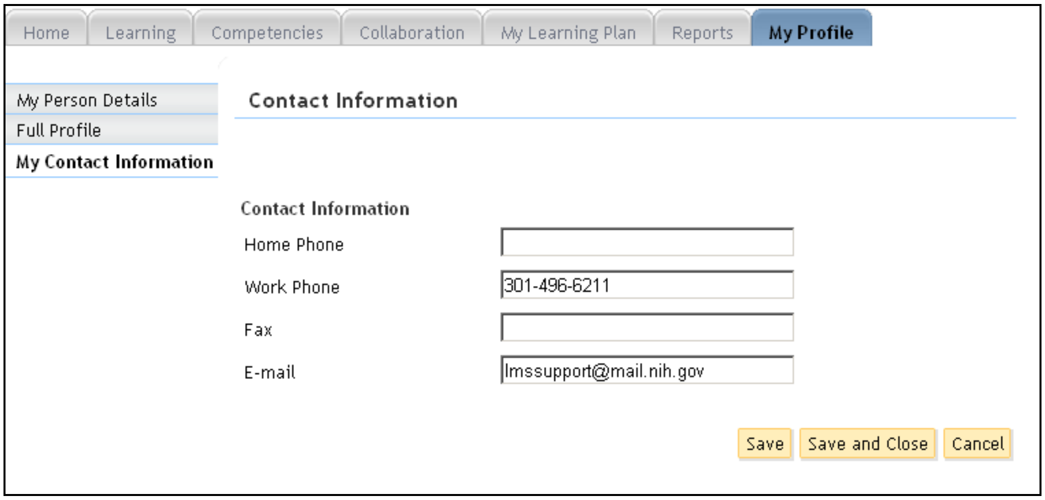


5. You can add your picture by clicking on the **Update Photo** link, modify items in your profile by clicking on the **Edit Profile Snapshot** link, or add/edit your personal objective by clicking on the **Personal Objective** link.
6. View the bottom of the page which shows an expanded view of your Current Job Information, Competencies, Licenses and Certifications, and Languages.

STEP-BY-STEP (ADDING OR CHANGING YOUR EMAIL ADDRESS)

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. Select the **My Learning** role in the drop-down **Go To** menu. If there is no drop-down **Go To** menu, then this is the default screen.
3. Click on the **My Profile** tab.
4. Click **My Contact Information** from the menu item on the left-hand sidebar.
5. Confirm your email address in the **E-mail** field is there and is correct. Change your email address if needed.
6. Click **Save and Close**.


Home
Learning
Competencies
Collaboration
My Learning Plan
Reports
My Profile
My Person Details
Full Profile
My Contact Information
Contact Information
Contact Information
Home Phone
Work Phone
301-496-6211
Fax
E-mail
lmssupport@mail.nih.gov
Save
Save and Close
Cancel

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_info.html

NIH LMS Team Support
LMSSupport@mail.nih.gov

LMS Administrators in the ICs
http://trainingcenter.nih.gov/pdf/lms/LMS-Admins-Lists.pdf