

HHS Learning Portal

People Administrator



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HHS Learning Portal

PEOPLE ADMINISTRATOR

Version 6.0



National Institutes of Health Training Center

National Institutes of Health Training Center, Rockville 20852

Version 6.0 published July 2019

Version Number	Revision Date	Approved By	Approved Date	Description of Change
1.0	12/13/2009	NIH LMS Implementation Team	12/13/2009	Initial publication
1.5	08/11/2010	NIH LMS Implementation Team	08/11/2010	Revised to include: - Competency Groups - Updated screen shots - Updated Transcript management - Reorganized content
2.0	10/30/2013	NIH LMS Team	10/30/2013	Updated screen shots
3.1	02/24/2014	Jesus Bonet	02/24/2014	Updated helpdesk contact info
3.2	06/11/2014	Jesus Bonet	06/03/2014	Deleted copyright info
4.0	01/13/2014			7.2 Upgrade Revisions
5.0	05/20/2015	Michele Schwartzman	05/20/2015	Updated image formatting
6.0	07/22/2019	Tom Holscher	07/22/2019	Updated URLs

Please submit any questions or suggestions for changes to
https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx.

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PEOPLE ADMINISTRATOR

INTRODUCTION

HHS Learning Portal/LMS: These terms 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 you should understand before beginning to perform administrative 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. Due to the nightly updates, all data changed in the learner profile will be overwritten, with the exception of the learner e-mail and manager fields.

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 listed will allow managers to view their direct reports and access training and development information about them. An alternate manager can be assigned if the manager field cannot be changed due to a data feed.
- **Organization:** People are grouped in the LMS according to Organization/SAC Code. (See Appendix A.) This code is used to build audience types (which restrict access to courses), narrow the scope of reports, etc. This code must be correct or learners will neither show up in reports correctly nor have access to the correct training opportunities.

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. The HHS Learning Portal is comprised of many domains; some of which are strictly dedicated to NIH and its staff and learning resources. (See Appendix C for a graphic depiction.)

These domains allow for the partitioning of the following components that may be managed by various administrator security roles:

Component	Example...
Business rules	NIH offerings do not, by default, require manager approval prior to registration.
Notifications	NIH email notifications include NIH-specific information and logos.
Locations, facilities, and rooms	NIH resources are only available to NIH administrators in the LMS.
User accounts	Only NIH administrators may access and modify the accounts of NIH staff.

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.

LMS users are unable to see information in domains that are at a higher or equal level in the hierarchy. Their permissions trickle down, which means they can see items in their own domain and sub-domains only. NIH staff can access training in the NIH domain and sub-domains, as well as the HHS Common domain.

The following are all sub-domains of the NIH domain:

- NIH Training Center (NIHTC)
- Clinical Center (CC)
- Center for Information Technology (CIT)
- Office of Research Services (ORS)
- National Institutes of Allergy and Infectious Diseases (NIAID)
- NIH Common

For a graphic representation of the HHS Learning Portal domain structure please refer to Appendix C of this document.

SECURITY ROLES

Security Roles further define the permissions of individual users in a domain. Most of the security roles in the LMS are 'tied' to the domain (e.g., a user assigned the People Administrator security role at the NIH domain has access to manage NIH components, as well as those in NIH sub-domains).

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.

Domain-Specific Security Roles include:

- Learning Administrator
- Content Administrator
- Domain System Administrator
- People Administrator

There is one Security Role that is defined by Organization/SAC code instead of the domain – Local Learning Registrar (LLR). This restricts the LLR to performing actions associated with Learners within a specific Institute or Center (IC) only.

PEOPLE ADMINISTRATOR ROLE

The LMS People Administrator role allows users to manage and administer people and certain components within the LMS. The People Administrator role is divided into two separate roles: 'People' and 'HR.'

With the People role you will be able to:

- View and edit account profiles for learners
- View and edit transcripts for learners
- Add external learning to transcripts
- View enrollments, curricula, certifications, courses, and competencies assigned to learners
- Manage learning plans
- Create, edit, and administer surveys
- View and create multi-rater competency assessments, and approve/reject raters
- Assign training items via prescriptive rules
- Run, export, email, and subscribe to various reports

With the HR role you will be able to:

- View internal and external organization information
- Manage job roles, jobs, and job families
- View, edit, and create new competencies and competency groups
- Manage Locations and Facilities
- Manage Learning Plans
- Run, export, email, and subscribe to various reports

This user manual will guide you through the privileges assigned to a People Administrator, including both of the roles described above.

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:

- by associating audience types and subtypes at the course level;
- attaching audience types with seat percentages at the delivery type level; and,
- specifying seat numbers for audience subtypes at the offering level.

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 or updating a learner self-assessment, or a manager/supervisor assessment, usually after relevant training has been completed or additional experience has been gained.

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 “required” and assessed competencies are “held.”

Competency Gap – This is a measure of the learner’s current competency proficiency minus his/her required competency proficiency level. This value indicates how much 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 viewers 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. Roles can be shared across multiple jobs. Role definitions may include:

- Competencies — competencies required to perform the role (including criticality of the competency and minimum required proficiency)

- **Certifications** — certifications required to perform the role.
- **Curricula** — curricula required to perform the role.
- **Attachments** — additional information about the job role.

Jobs – In the LMS, jobs are listed according to the OPM job series number. A job can be a collection of roles. It can inherit the competencies, certifications, curricula and attachments 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 function.

Learning Plan – Learning plans allow learners to keep track of learning offerings and other tasks needed for general development. Every LMS 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 an administrator signs another person up for an offering.

Prescriptive Rule – Prescriptive rules are used to dynamically assign goals or learning (offerings, courses, certifications, curricula, etc.) to people as a group. Prescriptive rules are defined to assign the prescribed goals/learning.

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.

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

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

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

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

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

WORKING WITH LEARNER PROFILES

PEOPLE - INTERNAL

The LMS learner **Profile** contains information about each learner in the system. You may also designate **Alternate Managers**, **Alternate Team Members**, and the **Additional Approver for Orders** in the learner profile. All other information is populated in the learner profile by the NIH Enterprise Directory (NED), Capital HR (EHRP), and Commission Corps data feeds.

IMPORTANT! Although you may view the security role privileges assigned to a learner, you are NOT authorized to add or delete security role privileges. If you feel it is necessary to change the security role privileges of a learner, you must submit a ticket to the HR Systems Support Help Desk at:
https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx.

VIEW AND EDIT A LEARNER PROFILE

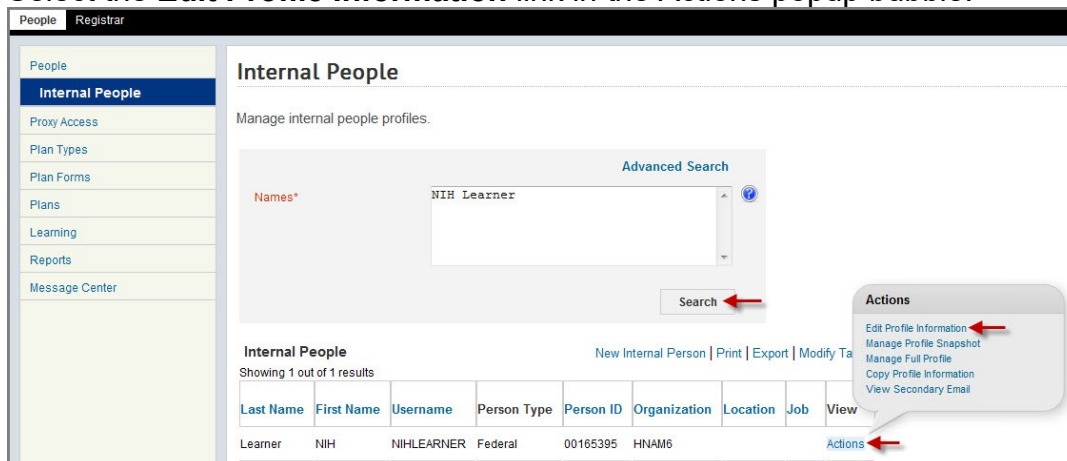
1. Click the **Admin** icon.



2. Enter the learner's name in the Name(s) search field and click **Search**.

NOTE: To view acceptable formats for searching, click the **Help** icon to the right of the Name(s) search field.

3. Click the **Actions** link in the View column.
4. Select the **Edit Profile Information** link in the Actions popup bubble.



NOTE: If you do not find the account you are looking for, try using the Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

IMPORTANT! The majority of HR Information in the Learner Profile is populated by automated data feeds from the Capital HR, NED, and/or Commission Corp

databases. If any of the information is incorrect, it must be corrected in the source system and not the LMS.

5. The learner's profile will be displayed.

Edit Profile Of NIH Learner

Main | **Contact Information** | Address | Password | Preferences | Privileges

Title: -Select One- | Username*: NIHLEARNER

First Name*: NIH | Last Name*: Learner

Alias: NIHLEARNER

Middle Name: S | Suffix: JR

Domain*: NIH | Status*: Full Time

Home Domain*: NIH

Organization*: HNAM6 | Person No: 00165395

Job: | Business Card Title: JOB TITLE

Manager: NIH Manager

Additional Approver for Orders: NIHADDITIONALAPPROVER

Location: | Type: Federal

Start Date: 04/08/2008 | Discount: 0

Terminated On: | Job Level: -Select One-

Manager Access: ☐

Time Zone*: (GMT-05:00) Eastern Time (US & Canada)

VERIFY AND ADD A LEARNER'S EMAIL

A learner's email address must be correct in order for them to receive emails generated by the LMS (e.g., registration confirmation, cancelation notifications, etc.). The learner's email address comes to the LMS via the NED data feed. If it is incorrect, update the email address in the learner's NED profile and it will be updated in the LMS the following day. Additional email addresses can be added.

Follow the steps below to verify a learner's email and add an additional email address.

1. On the main Edit Profile screen, click the **Contact Information** tab.

2. To add an email address, click **Add Email**.

Edit Profile Of NIH Learner

Main **Contact Information** Address Password Preferences Privileges

Contact Information

Home Phone

Work Phone

Fax

Email [Add Email](#)

No items found

Save Cancel

3. Add the **New email** address.
4. Indicate it is the primary email address by clicking the **Primary** checkbox, if applicable.
5. Click **Save**.

Edit Profile Of NIH Learner

Main **Contact Information** Address Password Preferences Privileges

Contact Information

Home Phone

Work Phone

Fax

Email

No items found

New email ☒ Primary

Save Cancel

CHANGING AN ADDITIONAL APPROVER FOR ORDERS (AAO)

There are situations where the **Additional Approver for Orders (AAO)** must be changed. The People Administration role is the only LMS role that has permissions to do this (Local Learning Registrars cannot). Follow the steps below to change an **Additional Approver for Orders**.

1. On the main Edit Profile screen, click the **Additional Approver for Orders** picker icon.

Edit Profile Of NIH Learner

* = required

Main | Contact Information | Address | Password | Preferences | Privileges

Title: -Select One- | Username*: NIHLEARNER

First Name*: NIH | Last Name*: Learner

Alias: NIHLEARNER

Middle Name: S | Suffix: JR

Domain*: NIH | Status*: Full Time

Home Domain*: NIH

Organization*: HNAME6 | Person No: 00165395

Job: | Business Card Title: JOB TITLE

Manager: NIH Manager | Type: Other

Additional Approver for Orders: NIHADDITIONALAPPROVER

Location: | Discount: 0

Start Date: 04/08/2008 | Job Level: -Select One-

Terminated On: |

Manager Access: ☐ |

Time Zone*: (GMT-05:00) Eastern Time (US & Canada)

Additional Organizations | Add Additional Organizations

No items found

Alternate Managers | Add Alternate Manager | Print | Export

2. Enter the search criteria for the manager then click **Search**.
3. Click the **Select** checkbox for the person that will be designated as the **Additional Approver for Orders**.
4. Scroll to the bottom of the Edit Profile screen and click **Save**.

Note: Once saved, the **Additional Approver for Order** is displayed as the person's LMS username. To determine who the person is in the Additional Approver for Order field, copy the username and then click the **Additional Approver for Orders** picker icon. Then paste it into the Username field and click **Search**.

ADD AN ALTERNATE MANAGER

There are situations where a learner requires someone other than, or in addition to, the person specified in the Manager Field to perform managerial tasks such as approvals. In these situations, a Local Learning Registrar or People Administrator can add one or more people to the Alternate Manager section of the learner's profile.

Follow the steps below to add an Alternate Manager.

1. While viewing the Edit Profile screen, click the **Add Alternate Manager link**.





The screenshot displays the 'Edit Profile' screen with a tabbed interface at the top: Main (selected), Contact Information, Address, Password, Preferences, and Privileges. The form is divided into two columns. The left column contains fields for Title (dropdown), First Name* (NIH), Alias (NIHLEARNER), Middle Name (S), Domain* (NIH), Home Domain* (NIH), Organization* (HNAM6), Job, Manager (NIH Manager), Additional Approver for Orders (NIHADDITIONALAPPROVER), Location, Start Date (04/08/2008), Terminated On, Manager Access, and Time Zone* ((GMT-05:00) Eastern Time (US & Canada)). The right column contains fields for Username* (NIHLEARNER), Last Name* (Learner), Suffix (JR), Status* (Full Time), Person No (00165395), Business Card Title (JOB TITLE), Type (Federal), Discount (0), and Job Level (-Select One-). Below the form, there are two sections: 'Additional Organizations' with a link 'Add Additional Organizations' and 'Alternate Managers' with a link 'Add Alternate Manager' highlighted by a red arrow. Both sections currently show 'No items found'.

2. Enter the search criteria for the Alternate Manager then click **Search**.
3. Click the **checkbox** to the left of the first name of the Alternate Manager.


4. Click the **Select** button.

Search Person, Internal

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the "**Manager**" field, clicking the **Magnifying Glass** graphic, and then clicking the "**Search**" button.

First Name	<input type="text" value="NIH"/>	Last Name	<input type="text" value="Manager"/>
Person ID	<input type="text"/>	Username	<input type="text"/>
Manager	<input type="text"/> 	Organization	<input type="text"/> 
Location	<input type="text"/> 	Domain	<input type="text"/> 
Person Type	<input type="text" value="-Select One-"/>	Security Roles	<input type="text" value="-Select One-"/>

Include All Suborganizations ☐


 **Search**

Select


People [Print](#) | [Export](#)

Showing 1 out of 1 results

	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	Manager	NIHMANAGER	Other	00377279	HNA		

 **Select** **Close**

5. The name of the Alternate Manager will now be listed in the learner's profile.

Alternate Managers		Add Alternate Manager Print Export
Name	Actions	
NIH Manager		

NOTE: You can add as many Alternate Managers as needed. Alternate Managers will receive the same LMS notifications and privileges as managers.

VIEW A LEARNER'S PROFILE SNAPSHOT

The snapshot of a learner's profile provides a summary of information about the learner. You can view the learner profile snapshot by following the instructions provided below.

1. Select the **Admin** icon.



5. Enter the learner's name in the search box and click **Search**.

NOTE: If you do not find the account you are looking for, try **Advanced Search**. The **Advanced Search** will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

6. Click the Manage Profile Snapshot to the right of the correct learner.

Internal People

Manage internal people profiles.

Advanced Search

Names*
nih learner

Search

Internal People [New Internal Person](#) | [Print](#) | [Export](#) | [Modify Ta](#)

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Person ID	Organization	Location	Job	View
Learner	NIH	NIHLEARNER	Other	00165395	HNAM6			Actions

Actions

- Edit Profile Information
- Manage Profile Snapshot
- Manage Full Profile
- Copy Profile Information
- View Secondary Email

Actions

7. You are now viewing the **Snapshot** tab of the learner's profile. Here you will find a quick view of basic learner information.

NIH Learner's Profile

Snapshot

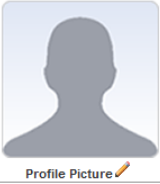
Full Profile

Resource

Quicklinks

NIH Learner, JR

Edit Profile Snapshot



Profile Picture

Personal Objective

Professional Profile Information

Username: NIHLEARNER	Person ID: 00165395
Organization: HNAM6	Job Type:
Business Card Title: JOB TITLE	
Manager: NIH Manager	Alternate Manager: NIH AlternateManager
	Status: Full Time
Person Type: Other	

Official Contact Information

Office Phone: 301-496-6211
Email Address:
Timezone: (GMT-05:00) Eastern Time (US & Canada)

Personal Attributes

Start Date: 04/08/2008
Terminated Date:
Domain: NIH

Other Information

Preferred name: Average Joe	HSPD-12 ID:
HHS ID: NIHLEARNER	Sub-OPDIV: OD
OPDIV ID: NIHLEARNER	Supervisory Code:
Pay Plan: GS	User Type:
LCMS User Type:	Grouping:

8. Click the **Full Profile** tab.

NIH Learner's Profile


Snapshot **Full Profile** **Resource** **Quicklinks**

Expand All | Collapse All | Resume View | Printer View | Export to PDF

▼ Snapshot

NIH Learner, JR

Edit Profile Snapshot



Profile Picture

Personal Objective

Profile Completeness:

30 % complete

Profile Status:

Out of Date

nihsupervisor last updated
this profile on Jul 22, 2010.

Professional Profile Information

Username: NIHLEARNER

Organization: HNAME

Business Card Title: JOB TITLE

Manager: NIH Manager

Status: Full Time

Person Type: Other

Alias: NIHLEARNER

Job Type:

Alternate Managers: NIH AlternateManager

Person ID: 00165395

Additional Organizations

No items found

Official Contact Information

Office Phone: 301-496-6211

Email Address:

Timezone: (GMT-05:00) Eastern Time (US & Canada)

Personal Attributes

Start Date: 04/08/2008

Terminated Date:

Domain: NIH

Other Information

Preferred name: Average Joe

HHS ID: NIHLEARNER

OPDIV ID: NIHLEARNER

Pay Plan: GS

LCMS User Type:

HSPD-12 ID:

Sub-OPDIV: OD

Supervisory Code:

User Type:

Grouping:

► Current Job Information

► Competencies

► Licenses and Certifications

► Languages

NOTE: To view details about an individual section of the profile, click the **Expansion (>)** button to the left of each section heading. To view details about all sections at once, click the **Expand All** link at the top of the page.

Current Job Information – includes job type, organization, manager and alternate manager, direct reports and alternate team members, and required and optional job roles (which you may add). (You will learn more about roles later.)

▼ Current Job Information

Job Information

Job Type:

Organization: HNAME

Local Learning Registrar: No

Manager: [NIH Manager](#)

Alternate Managers: [NIH AlternateManager](#)

Primary Function: Learning Administration

Accomplishments:

Job Attachments:

Annual Base Compensation:

Current Level:

Business Card Title: JOB TITLE

Job Responsibilities:

Mentors:

Location:

Direct Reports:

Alternate Team Members:

Secondary Function:

Additional Responsibilities:

Instant Message ID: [Edit](#)

Target Total Annual Compensation:

Job Family:

Required Roles

Add Required Role

Name	Assigned By	Actions
NIH Information Technology	NIH PeopleAdmin	Mark Optional Delete
NIH Experienced Supervisor	Thomas HOLSCHER	Mark Optional Delete
NIH New Supervisor	Thomas HOLSCHER	Mark Optional Delete

Optional Roles



Add Optional Role

Name	Assigned By	Actions
NIH Administrative Officer	NIH PeopleAdmin	Mark Required Delete



Competencies – lists the top three strengths and top three development needs of the learner.

▼ Competencies				
Strengths (Top three)			Go to All Held Competencies	
Competency Name	Source	Source Name	Required Proficiency	Held Proficiency
NIH Process Management	Manager	NIH Manager	3	4
NIH Advisory Assistance	Self	NIH Learner	2	3
NIH Strategic Planning	Manager	NIH Manager	2	2
Developmental Needs (Top Three)			Go to All Developmental Needs	
Competency Name	Source	Source Name	Required Proficiency	Held Proficiency
NIH Coaching	Self	NIH Learner	3	
NIH Federal Budget Process		Jonathan LAPPIN	3	
NIH External and Organizational Awareness		Jonathan LAPPIN	3	

Licenses and Certifications – any certification earned within the LMS will be listed, and you may also add external certifications the learner has earned.

▼ Licenses and Certifications				
Internal Licenses and Certifications				
Name	Acquired On	Expires On		
NIH Environmental Management System (NEMS) Awareness Training Certification	09/29/2010	09/29/2011		
HHS Records Management for All Employees Certification	12/19/2010	05/03/2011		
NIH Disability Awareness Training Certification	In Progress	N/A		
NIH NoFEAR Act Training Certification	In Progress	N/A		
NIH Prevention of Sexual Harassment Training Certification	In Progress	N/A		
NIH Online Orientation Certification	In Progress	N/A		
NIH NIA Alternative Dispute Resolution Certification	03/02/2012	N/A		
NIH EEO Laws & Regulations Certification - NIDDK	08/17/2010	08/17/2011		
NIH Diversity Management Training - NIDDK	08/17/2010	08/17/2011		
NIH Information Security Awareness Course Certification OBSOLETE	04/02/2009	N/A		
External Licenses and Certifications				Add Certification
Showing 1 out of 1 results				
Name	Institution	Acquired On	Expires On	Actions
Systems Security Certified Practitioner (SSCP)	University of MD	11/12/2009	11/12/2010	 

Languages – lists languages that the learner has some experience with, and you may add to this list for the learner as well.

▼ Languages					
Showing 1 out of 1 results					Add Language
Language	Speaking Level	Reading Level	Writing Level	Notes	Actions
English	High	High	High		 
NIH Learner last updated this section on Oct 21, 2009.					

- Click the **Resource** tab. This tab will allow you to designate the person as a resource as an instructor to assign to a class.

Snapshot	Full Profile	Resource	Quicklinks
View Resource Schedule			
Available as a resource (if available please specify a billing rate) <input type="radio"/> Yes <input checked="" type="radio"/> No Rates Add Rate No items found			
Learning Group Administrator No items found			
Languages Spoken Add Language No items found			
Qualified Learning Add Qualified Learning No items found			
Attachments Add Attachment No items found			
		Save	Cancel

MANAGING JOBS AND ROLES

JOBS

In the HHS Learning Portal, jobs are based on OPM job series codes. They are created automatically by the Capital HR and Commissioned Corps data feeds that these systems have with the LMS. As a result, Jobs are never manually created.

IMPORTANT! Jobs can be viewed for informational purposes only. Never create or delete them.

VIEW JOBS

1. Select the **Admin** Icon.



2. Click on the **HR** tab.
3. Click on the **Jobs** link.
4. Enter criteria and select **Search**.

The screenshot shows the HHS Learning Portal interface. At the top, there are tabs for "People" and "HR", with "HR" being the active tab. On the left side, there is a vertical menu with links for "Organizations", "Job Families", "Job Level", "Roles", "Jobs", "Competencies", "Locations", "Facilities", and "Reports". The "Jobs" link is highlighted with a red arrow. The main content area is titled "Jobs" and contains a search form with the following fields: "Name", "Description", "Job Family", "Key Responsibilities", "Critical Job" (checkbox), "Start Date >=" (with a calendar icon), "End Date <=" (with a calendar icon), "Job Level" (dropdown menu), and "Status" (dropdown menu). Below the search fields are links for "Configure" and "Save Search Query". At the bottom right of the search form is a "Search" button, which is highlighted with a red arrow.

IMPORTANT! Do not delete any of the jobs that are listed.

5. Click the Name of a job to see details about it.

IMPORTANT! Do not edit any details of a job.

ROLES

Roles may be used to group functional skills needed by groups of people. Competencies, Certifications, Curricula, Attachments, Learning Recommendations, and Continuing Education Requirements can all be added to roles.

Once created, a Role may be assigned to a Learner from the **Current Job Information** section of a Learner's **Full Profile**. This makes everything associated with the Role available to the Learner. When modifications are made to a Role, the change is reflected in the profile of any Learner associated with the modified Role.

VIEW A ROLE

1. Select the **Admin** Icon.



2. Click on the **HR** tab.
3. Click on the **Roles** link.
4. Enter search criteria in the Name field then click **Search**.

The screenshot shows the 'Roles' page in the HHS Learning Portal. The 'HR' tab is selected at the top. In the left sidebar, the 'Roles' link is highlighted with a red arrow. The main content area has a search bar with 'NIH' entered. Below the search bar are links for 'Configure', 'Save Search Query', and a 'Search' button, with a red arrow pointing to the 'Search' button. Below the search bar, there is a table of roles. The table has columns for 'Name' and 'Actions'. The first three rows show 'NIH Administrative Officer' roles with red 'X' marks in the 'Actions' column. The table is titled 'Roles' and 'Showing first 25 out of 201 results'. There are pagination links '1 2 3 4 5 ... Next' and action links 'New Role | Print | Export | Modify Table'.

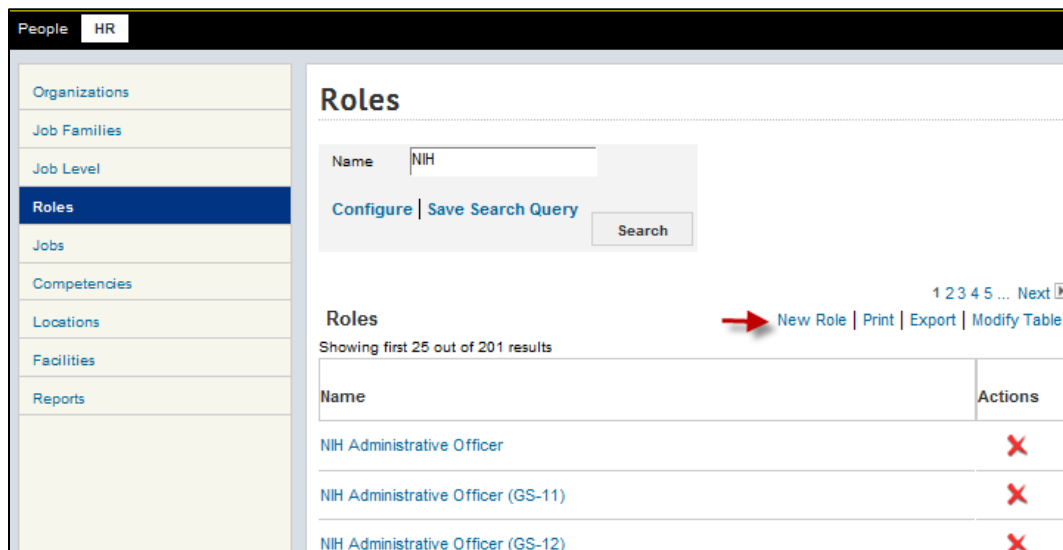
5. Click on the role **Name** link to see its details.
6. On the Role Details Main tab, the information as needed then click **Save** when you are finished.

CREATE A ROLE

1. Select the **Admin** Icon.



2. Click on the **HR** tab.
3. Select **Roles** from the menu on the left.
4. Next click on the **New Role** link.



On the **New Role** screen enter the **Name** of the new role; add a **Description**, then select NIH for the **Domain**.

The screenshot shows the "New Role" form. It has three input fields: "Name*" with the value "NIH Test", "Description" with the value "NIH Test", and "Domain*" with the value "NIH". To the right of the "Domain*" field is a small icon of a document with a checkmark. At the bottom right, there are two buttons: "Save" and "Cancel". A red arrow points to the "Save" button.

5. Click **Save**.

USING COMPETENCIES, SURVEYS & ASSESSMENTS

COMPETENCIES

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

You may find more information about NIH competencies on the NIH OHR web site at <http://hr.od.nih.gov/workingatnih/competencies/default.htm>. NIH competencies have already been added to the LMS. You should use the NIH competencies that have previously been entered.

Please contact the NIH Competencies Team in the NIH Training Center (<http://trainingcenter.nih.gov/contact.html>) before deciding to add any additional competencies to the LMS. Because required competency assessment information often has to be reported to the Department and OPM, it is important to maintain standards within NIH to facilitate thorough reporting.

As a People Administrator, you are able to view a learner’s required and held competencies.

VIEW LEARNER COMPETENCIES

1. Select the **Admin** Icon.



2. Select **Competencies** link from the menu on the left.
3. Enter the learner’s name in the search box and click **Search**.

People HR

People
Proxy Access
Distribution Lists
Plan Types
Plan Forms
Plans
Learning
Competencies
Competencies
Multi-Rater Assessments
Raters Pending Approval
Assessment History
Assessments Pending Approval
Approval History

Competencies

Advanced Search

Person Names: NIH Learner

Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results.
Example: Williams; Bob Smith; Jones, Sharon

Search

Competencies Modify Table

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Required Competencies	Held Competencies
Learner	NIH	NIHLEARNER	Other	View Required	View Held

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

- Select the **View required** link to the right of the correct learner.

NOTE: View required will list all competencies. View Held will only list competencies that have been assessed at least once.

- You may filter the list of **Required/Held Competencies** using the options in the **View By** drop-down menu.

NIH Learner: Required Competencies

A required competency is a competency that has been assigned to you.

☐ Show only competencies that have never been assessed.

New MRA

View By: **All Required Competencies**
 All Required Competencies
 Current Job
 Active Plans
 Career Interests

Print | Export | Modify Table

Required Competencies
Showing first 25 out of 41 results

<input type="checkbox"/>	Expert	Competency Name	Source	Required Level	Held Level	Gap	Pending Approvals	Group	Actions
<input type="checkbox"/>	NIH Acquisition Planning	Person: Jaime MARTINEZ-BORRERO (more)	5 - Expert	4 - Advanced	-1			NIH Finance, NIH Administrative Officer (GS-341), NIH Contracting Specialist (GS-1102)	Actions
<input type="checkbox"/>	NIH Acquisition Planning Assistance	Person: Jonathan	3 - Intermediate		-3			NIH Administrative Technician (GS-	Actions

Profile Quicklinks
 Certifications
 Curricula
 Competencies
 Current Learning
 Completed Learning
 Continuing Education Status
 Profile Snapshot
 Multirater Assessment Plans

- Click the **Competency Name** to view details about any competency in the list.
- The **Source** column indicates how the competency was assigned, and **Required Level**, **Held Level**, and **Gap** are shown as well.

View training related to competencies: **As a People Administrator, you can view all training in the LMS that directly relates to the competency. Follow these steps to view the LMS courses related to the learner's competencies.**

1. Follow the steps to view a learner's competencies. (See page 29)
2. Click the **Actions** link in the **Actions** column.

NIH Learner: Required Competencies

A required competency is a competency that has been assigned to you.

☐ Show only competencies that have never been assessed. View By: All Required Competencies

[New MRA](#) [Submit](#)

1 2 Next [Refresh Table](#)

Required Competencies
Showing first 25 out of 41 results

<input type="checkbox"/>	Expert	Competency Name	Source	Required Level	Held Level	Gap	Per	Actions
<input type="checkbox"/>		NIH Acquisition Planning	Person: Jaime MARTINEZ-BORRERO (more)	5 - Expert	4 - Advanced	-1		<div> Delete Close Gap View Assessments New MRA </div>

Administrative Officer (GS-341), NIH Contracting Specialist (GS-1102) [Actions](#) [Action](#)

3. Click **Close Gap** to view all training in the LMS that is related to the competency.

Close Competency Gap: NIH Acquisition Planning

Competency Name: [NIH Acquisition Planning](#)

Required Level: 5 - Expert

Current Level: 4 - Advanced

Recommended Learning

Learning	Type of Learning
NIH Negotiation Strategies for Simpl. Acquisitions	Course
NIH Price Reasonableness in Simpl. Acquisitions	Course
NIH Professional Services	Course
NIH Purchase Card Training (NBS)	Course
NIH Simplified Acq. & Delegated Procurement (NBS)	Course

Expert List

No items found

[Cancel](#)

NOTE: As a People Administrator, you may select any of the listed courses and create an order to register the learner. (Orders are covered later in this manual.)

VIEWING ASSESSMENTS

As a People Administrator, you may view the results of any assessments done for learners' competencies. Follow these steps to view the assessment results of an assessed competency.

Follow the steps to view a learner's competencies. (See page 29)

While viewing required/held competencies, click the Actions link associated with the competency.

1. Select View Assessments from the Actions bubble.

NIH Learner: Required Competencies

A required competency is a competency that has been assigned to you.

☐ Show only competencies that have never been assessed. View By: All Required Competencies

New MRA Submit

Required Competencies

Showing first 25 out of 41 results

<input type="checkbox"/>	Expert	Competency Name	Source	Required Level	Held Level	Gap	Per	Actions
								Delete Close Gap View Assessments New MRA

Person:

The Competency Assessments screen lists all assessments made for the competency. It gives the Date the assessment occurred, the Method (source) of the assessment, the Level assessed, whether the rating is In Calculation, and any Comments that were made.

NIH Acquisition Planning: View All Assessments

Competency Name: [NIH Acquisition Planning](#)

Description: Develops and guides program management through a comprehensive plan for fulfilling acquisition needs in a timely manner and at a reasonable cost in accordance with Federal and Departmental regulations, policies and procedures.

Current Required Level: 5 - Expert

Current Held Level: 4 - Advanced

Assessments for Held Level [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Date	Method	Details	Assessed Level	Approval Status	In Calculation?	Comments	Actions
12/18/2010	Manager Assessment	Jaime MARTINEZ-BORRERO	4 - Advanced		Yes	This is for SSO Testing purposes only.	Actions

Expert List

No items found

Cancel

2. Click the **Actions** link in the actions column.
3. Click the **View Assessment Details** link in the Actions bubble.

NIH Acquisition Planning: View All Assessments

Competency Name [NIH Acquisition Planning](#)

Description Develops and guides program management through a comprehensive plan for fulfilling acquisition needs in a timely manner and at a reasonable cost in accordance with Federal and Departmental regulations, policies and procedures.

Current Required Level 5 - Expert

Current Held Level 4 - Advanced

Assessments for Held Level

Showing 1 out of 1 results

[Print](#) | [Export](#) | [Modify Table](#)

Date	Method	Details	Assessed Level	Approval Status	In Calculat	Actions
12/18/2010	Manager Assessment	Jaime MARTINEZ-BORRERO	4 - Advanced		Yes	View Assessment Details This is for SSO Testing purposes only. Actions

[Export List](#)

4. You will now see the details of the assessment shown in a new window.

NIH Acquisition Planning: Self Assessment Details

[Print](#) | [Export](#)

Assessment Details

Person Name	NIH Learner
Assessed On	12/18/2010
Competency	NIH Acquisition Planning
Held Level	4 - Advanced
Comments	This is for SSO Testing purposes only.
Completed On	12/18/2010

SEARCH FOR AND VIEW COMPETENCY DETAILS

1. Select the **Admin** Icon.



2. Click on the **HR** tab.
3. Click on the **Competencies** link on the left hand side of the page.
4. From the Competency screen, enter the appropriate criteria and click **Search**.

People **HR**

Organizations
Job Families
Job Level
Roles
Jobs
Competencies
Competencies
Proficiency Levels
Assessment Methods
Competency Groups
Approval Chain

Competencies

Name: Competency Group:
Domain: Show retired competencies: ☐
[Configure](#) | [Save Search Query](#) [Search](#)

Competencies [New Competency](#) | [Print](#) | [Export](#) | [Modify Table](#)
Showing 5 out of 5 results

Competency Group	Name	Description	Actions
NIH Accounting (GS-510)	NIH Project Management	Creates and maintains an environment that guides a project to its successful completion.	

5. Click the **Name** of a competency to view details, such as **Description**, **Proficiency Indicators**, **Descriptors**, **Weights**, **Groups**, and **Attachments**.

Competency Details: NIH Project Management

* = required

Main | Proficiency Indicators | Descriptors | Weights | Groups | Attachments | Saba Exam

Name*
Description
Character Limit: 1000
Domain*

[Retire](#) [Retire and Replace](#) [Save](#) [Cancel](#)

IMPORTANT! You should not edit the details of any competency that you did not create.

CREATE COMPETENCY GROUPS

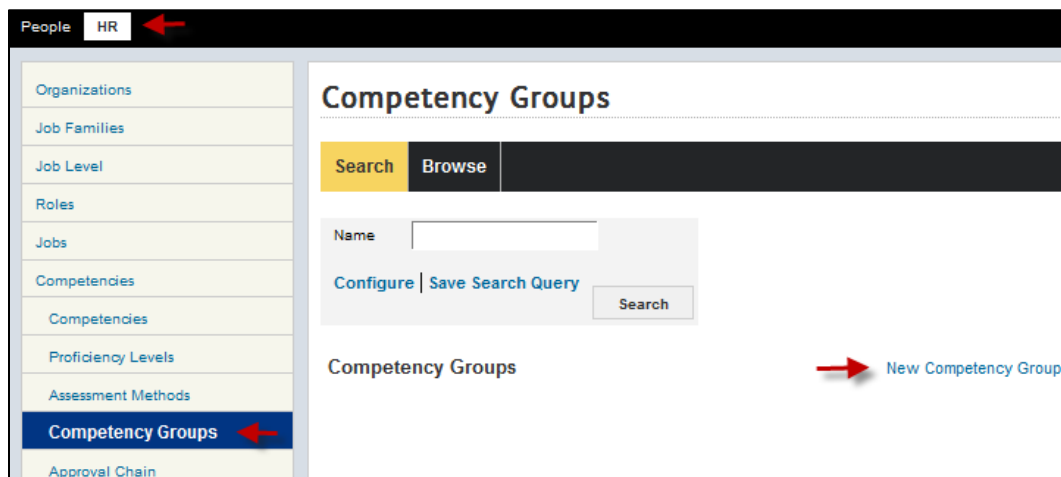
Competency Groups can be used to simplify searching for a set of related competencies.

The NIH Competencies Team at the NIH Training Center has created competency groups in the LMS that correspond to the Competencies Dictionary and the Suggested Competency Models, as found on the NIH Training Center website (<http://hr.od.nih.gov/workingatnih/competencies/default.htm>).

1. Select the **Admin** Icon.



2. Click on the **HR** tab.
3. Click on the **Competencies Group** link on the left hand side of the page.
4. Click the **New Competency Group** link.



NOTE: Search existing competency groups to determine whether your desired grouping already exists before creating a new one.

The image shows the "New Competency Group" form. It has a title bar "New Competency Group" and a legend "* = required". The form contains four fields: "Name*" with the value "NIH Administrative Competencies", "Description" with the value "All administrative competencies", "Parent Name" with an empty field and a dropdown arrow, and "Domain*" with the value "NIH" and a dropdown arrow. At the bottom right, there are "Save" and "Cancel" buttons.

5. In the **Name** field, enter “NIH” followed by a descriptive identifier for the group.
6. In the Description field, enter a brief explanation of the relationship between the competencies included in the group.
7. In the Parent Name field, only enter a value if the new Competency Group will be a sub-set of an existing Competency Group.
8. The Domain field defaults to “NIH” and should not be changed.
9. Click Save.
10. Click the Add Competency link to add competencies to the group.

New Competency Group

Name*

Description

Parent Name

Enable Rating Rollup ☐

Domain*

Subordinate Competency Groups [New Subordinate Competency Group](#)

No items found

Competencies [Add Competency](#)


No items found

11. From the **Add Competency** pop-up, search for the competencies to be added to the group.
12. Select the check box to the left of the competency to be added to the group.
13. Click **Select**.
14. Repeat Steps 10 through 13 until all desired competencies are added to the group.

Name

NIH Adaptability

Competency Group



Configure | Save Search Query

Search

Competencies

Modify Table

Showing 1 out of 1 results





Select

Close

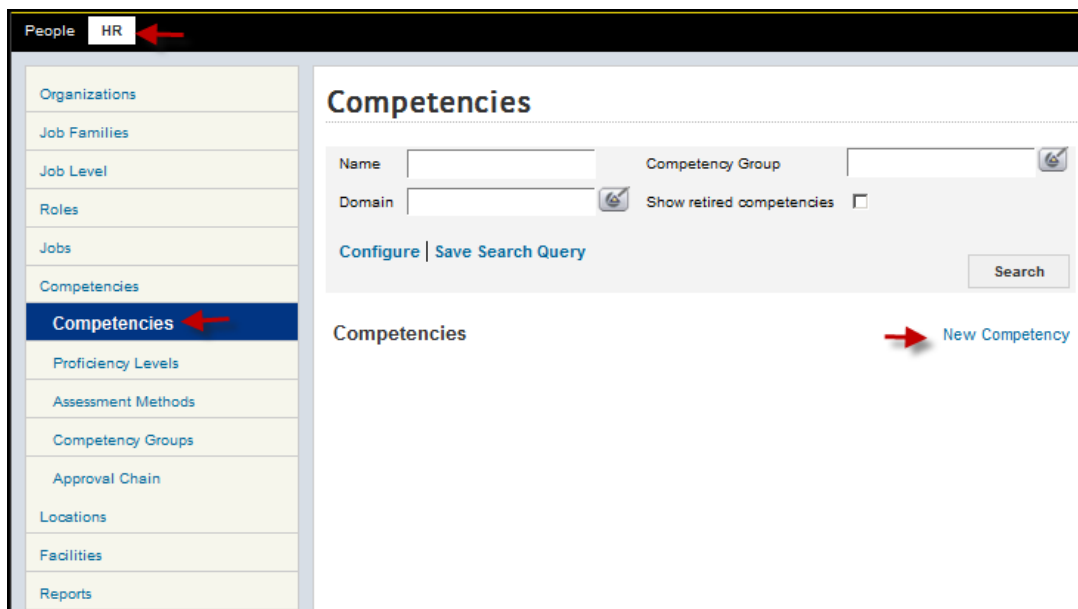
CREATE A NEW COMPETENCY

Remember to consult the NIH Competencies Team in the NIH Training Center (<http://trainingcenter.nih.gov/contact.html>) before deciding to add any additional competencies to the LMS.

1. Select the **Admin** Icon.



2. Click on the **HR** tab.
3. Click on the **Competencies** link on the left hand side of the page.
4. Click the **New Competency** link.



The screenshot shows the HHS Learning Portal interface. At the top, there are tabs for 'People' and 'HR', with a red arrow pointing to the 'HR' tab. On the left sidebar, there is a list of navigation links: Organizations, Job Families, Job Level, Roles, Jobs, Competencies, Proficiency Levels, Assessment Methods, Competency Groups, Approval Chain, Locations, Facilities, and Reports. The 'Competencies' link is highlighted in blue, and a red arrow points to it. The main content area is titled 'Competencies' and contains a search form with fields for 'Name', 'Competency Group', and 'Domain'. There is also a checkbox for 'Show retired competencies' and a 'Search' button. Below the search form, there is a 'New Competency' link with a red arrow pointing to it.

5. Enter a name for the competency in the **Name** field prefaced by “NIH”.

IMPORTANT! When adding a New Competency, the Name field must always start with NIH, and then the IC if the competency is specific to that IC.

New Competency

* = required

Name*

Description

Domain*

Save Cancel

6. In the **Description** field, enter a brief narrative of the competency.
7. The domain should be set to NIH which is the default setting.
8. Click **Save**.

NOTE: You have saved successfully when you see the Competency Details screen.

9. Click the **Proficiency Indicators** tab.

Competency Details: NIH New Competency One

Main Proficiency Indicators Descriptors Weights Groups Attachments Saba Exam

Name*

Description

Character Limit: 1000

Domain*

Retire Retire and Replace Save Cancel

NOTE: Competencies can be rated either by Proficiency Levels or by Behavioral Indicators. Proficiency Levels should match those used by NIH, while Behavioral Indicators can be added by using **Add Behavioral Indicators** at the bottom of the screen.

Competency Details: NIH New Competency One

Main
Proficiency Indicators
Descriptors
Weights
Groups
Attachments
Saba Exam

Rate Competency By:

☐ Proficiency Levels
☒ Behavioral Indicators

Proficiency Levels [Print](#) | [Export](#)

Showing 6 out of 6 results

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

Behavioral Indicators [Add Behavioral Indicator](#)

No items found

10. Click the **Descriptors** tab to Add, edit, or delete competency descriptors as needed.

Competency Details: NIH New Competency One

Main
Proficiency Indicators
Descriptors
Weights
Groups
Attachments
Saba Exam

You may add, edit or delete Descriptors in the table below

Behavioral Descriptors [New Behavioral Descriptors](#) | [Print](#) | [Export](#) | [Modify Table](#)

Description	Level	Actions
You have no training or experience	Awareness	
Basic Training has been received	Basic	

11. Click the **Weights** tab.

12. Adjust the numbers in the **Rating Weight** field as needed and click **Save**.

Competency Details: NIH New Competency One

Main

Proficiency Indicators

Descriptors

Weights

Groups

Attachments

Saba Exam

Use this tab to give weights to acquisition methods. Methods with higher weights will lend the competency a higher valuation when it is assessed.

Weights

Method	Rating Weight
Manager Assessment	6
Self Assessment	2
Multi-Rater Assessment	0
Learning Offering	0
Custom-Direct Observation	0

Save

Cancel

13. Weights are used to calculate the overall assessed proficiency level.

14. Click the **Groups** tab.

15. Click the **Add Group** link and select the appropriate group. Competencies may be organized into a group, but the group must be created first. (See instructions on how to [Create Competency Groups](#))

Competency Details: NIH New Competency One

Main	Proficiency Indicators	Descriptors	Weights	Groups	Attachments	Saba Exam
------	------------------------	-------------	---------	---------------	-------------	-----------

Competency Groups

No items found

[Add Group](#)

Save Cancel

Select Competency Group

Name

[Configure](#) | [Save Search Query](#)

1 2 Next ▾

Select Competency Group [Print](#) | [Export](#) | [Modify Table](#)

Showing first 25 out of 39 results

<input type="checkbox"/>	Name	Parent Name
<input checked="" type="checkbox"/>	NIH Accounting (GS-510)	
<input type="checkbox"/>	NIH Administration	NIH Technical Competencies Group

16. Scroll to the bottom and click on **Select**.

<input type="checkbox"/>	NIH Information Technology Management (GS-2210)
<input type="checkbox"/>	NIH Leadership and Management Competencies
<input type="checkbox"/>	NIH Non-Technical Competencies

1 2 Next ▾

Select Close

17. Click the **Attachments** tab.
18. Click the **Add Attachment** link to add attachments to a competency. URLs or files can be added to individual competencies which users will be able to view.

Competency Details: NIH New Competency One

Main	Proficiency Indicators	Descriptors	Weights	Groups	Attachments	Saba Exam
------	------------------------	-------------	---------	--------	-------------	-----------

Add or remove Attachments to or from the Competency.

[Attachments](#)→ Add Attachment

No items found

https://test.learning.hhs.gov/?callbackFunction=&owner_id=compt0000000000...

New Attachment

* = required

Attachment Name*

Type *

☒ URL
☐ File

Browse...

Category*

-Select One-

Locale*

English

Is Private

☐

Save

Close

MULTI-RATER ASSESSMENTS

As a People Administrator, you are able to view a learner's multi-rater competency assessments (current and completed), create new assessments, and approve raters for multi-rater assessments (MRAs).

VIEW LEARNER ASSESSMENTS

1. Select the **Admin Icon**.



2. Click the **People** Tab.
3. Click the **Competencies** Link towards the left of the page.
4. Enter the learner's name in the search box and click **Search**.
5. Click on the **View Assessment** link to the right of the learner.

The screenshot shows the "Multi-Rater Assessments" page in the HHS Learning Portal. On the left is a navigation menu with links like "People", "Proxy Access", "Distribution Lists", "Plan Types", "Plan Forms", "Plans", "Learning", "Competencies", "Competencies", "Multi-Rater Assessments" (highlighted with a red arrow), "Raters Pending Approval", "Assessment History", "Assessments Pending Approval", and "Approval History". The main content area is titled "Multi-Rater Assessments" and contains a search box labeled "Person Names" with the text "NIH Learner" entered. To the right of the search box is an "Advanced Search" section with instructions: "Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon". Below the search box is a "Search" button with a red arrow pointing to it. Below the search section is a table titled "Multi-Rater Assessments" showing "Showing 1 out of 1 results". The table has columns: "Last Name", "First Name", "Person Type", "View Assessments", and "New Assessments". The row shows "Learner", "NIH", "Other", "View Assessment" (with a red arrow pointing to it), and "New Assessment".

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

6. Click on the **MRA Title** to see assessment details.

Assessments: NIH Learner

A multi-rater assessment (MRA) is a method by which you can be assessed by others. The system supports two types of (MRA): Competency-based and Questionnaire-based also known as a 360 degree assessment.

Current

Completed

Multi-Rater Assessments

[New Multi-Rater Assessment](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 2 out of 2 results

MRA Title	Closes On	MRA Status	Actions
Test MRA		In Progress	Edit
User Manual Demo		In Progress	Edit

Profile Quicklinks

[Certifications](#)
[Curricula](#)
[Competencies](#)
[Current Learning](#)
[Completed Learning](#)
[Continuing Education Status](#)
[Profile Snapshot](#)
[Multirater Assessment Plans](#)

7. The assessment details will be displayed.

Assessment Details: Test MRA

Main

Competencies

MRA Title

Test MRA

Description

Ratee

NIH Learner

Closes On

Type

Competency-based

Nominated Raters

[Print](#) | [Export](#)

Rater Name	Approval Status	Rater Acceptance
NIH Manager	Approved	Accepted

Rejected Raters

No items found

8. Click on the **Edit link** in the Actions column to edit the assessment.

Assessments: NIH Learner

A multi-rater assessment (MRA) is a method by which you can be assessed by others. The system supports two types of (MRA): Competency-based and Questionnaire-based also known as a 360 degree assessment.

Current **Completed**

Multi-Rater Assessments [New Multi-Rater Assessment](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 2 out of 2 results

MRA Title	Closes On	MRA Status	Actions
Test MRA		In Progress	Edit
User Manual Demo		In Progress	Edit

Profile Quicklinks

- [Certifications](#)
- [Curricula](#)
- [Competencies](#)
- [Current Learning](#)
- [Completed Learning](#)
- [Continuing Education Status](#)
- [Profile Snapshot](#)
- [Multirater Assessment Plans](#)

9. The MRA Details screen will be displayed.

MRA Details

Type

Competency-based

MRA Title

Test MRA

Description

Ratee

NIH Learner

Closes On

Assessment Results

☐ Show Individual Comments
☐ Show Individual Rating Levels

Competencies to be Assessed

[Print](#) | [Export](#)

Competency Name	Target
NIH Process Management	
NIH Strategic Planning	
NIH Reconciliation and Financial Reporting	
NIH Risk Analysis	
NIH Federal and Departmental Policies and Procedures Knowledge	
NIH Financial Budget and Program Analysis	
NIH Project Management	

Raters

[Add Rater](#) | [Print](#) | [Export](#)

Rater Name	Person Type	Approval Status	Rater Acceptance	Actions
NIH Manager	Other	Approved	Accepted	

Rejected Raters

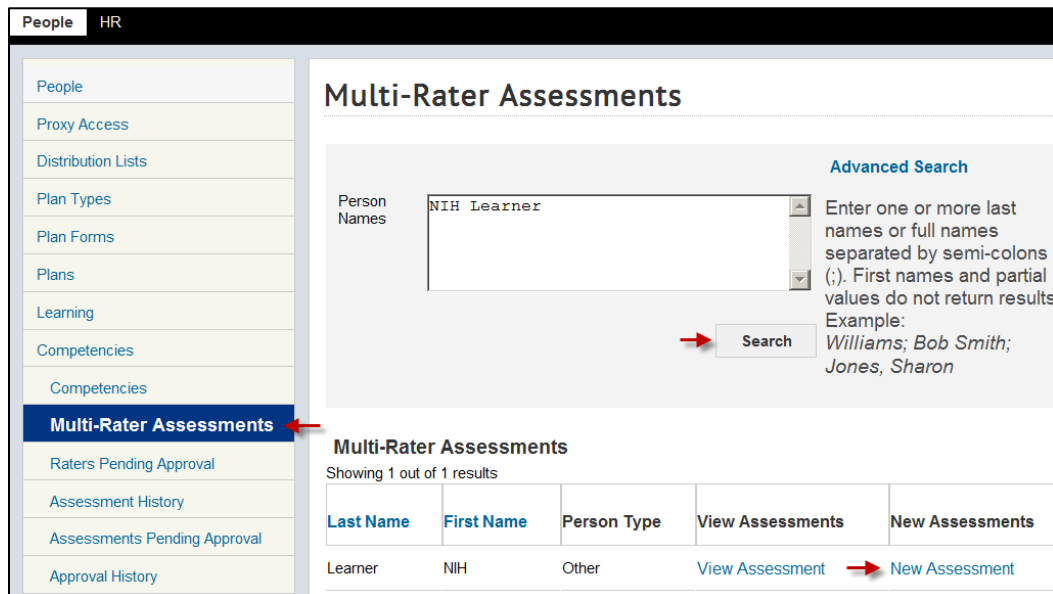
No items found

CREATE A MULTI-RATER COMPETENCY ASSESSMENT

1. Select the **Admin Icon**.



2. Click the **Competencies** link towards the left of the page.
3. Click the **Multi-Rater Assessments** link.
4. Enter the learner's name in the search box and click **Search**.
5. **NOTE:** See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.
6. Select **New Assessment** link to the right of the learner.



People HR

Multi-Rater Assessments

Advanced Search

Person Names: NIH Learner

Search

Enter one or more last names or full names separated by semi-colons (;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon

Multi-Rater Assessments

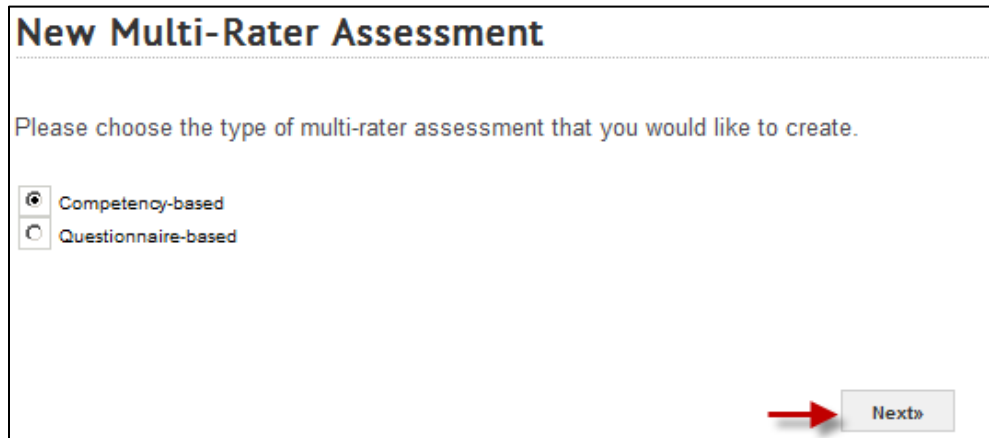
Showing 1 out of 1 results

Last Name	First Name	Person Type	View Assessments	New Assessments
Learner	NIH	Other	View Assessment	New Assessment

7. Click the Competency-based radio button on the **New Multi-Rater Assessment** screen.

NOTE: Training Administrators can create a questionnaire to use as a multi-rater assessment. If one exists, choose the Questionnaire-based radio button and follow the prompts to set up the assessment.


8. Click **Next**.



New Multi-Rater Assessment

Please choose the type of multi-rater assessment that you would like to create.

☒ Competency-based
☐ Questionnaire-based

 [Next»](#)

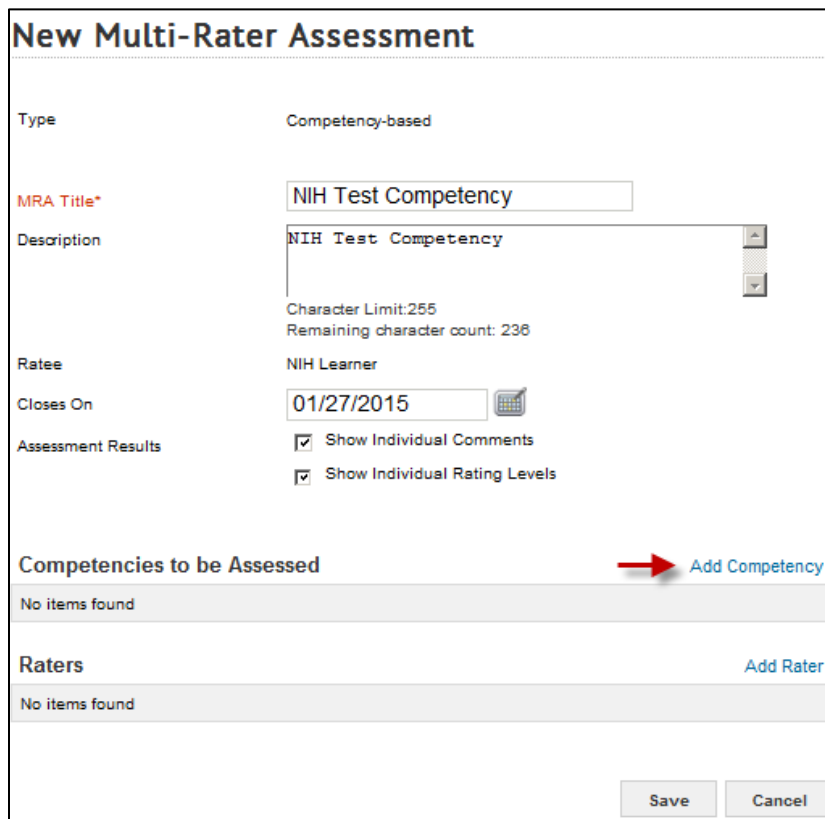
9. Give the new multi-rater assessment a title in the MRA Title field.

10. Add a description in the Description field.

11. Set a due date in the Closes On field.

12. Indicate whether you want individual comments and rating levels to be visible by clicking the appropriate checkboxes.

13. Click **Add Competency**.




New Multi-Rater Assessment

Type: Competency-based


MRA Title*:

Description:
Character Limit: 255
Remaining character count: 238

Ratee: NIH Learner

Closes On: 

Assessment Results:
☒ Show Individual Comments
☒ Show Individual Rating Levels

Competencies to be Assessed  [Add Competency](#)

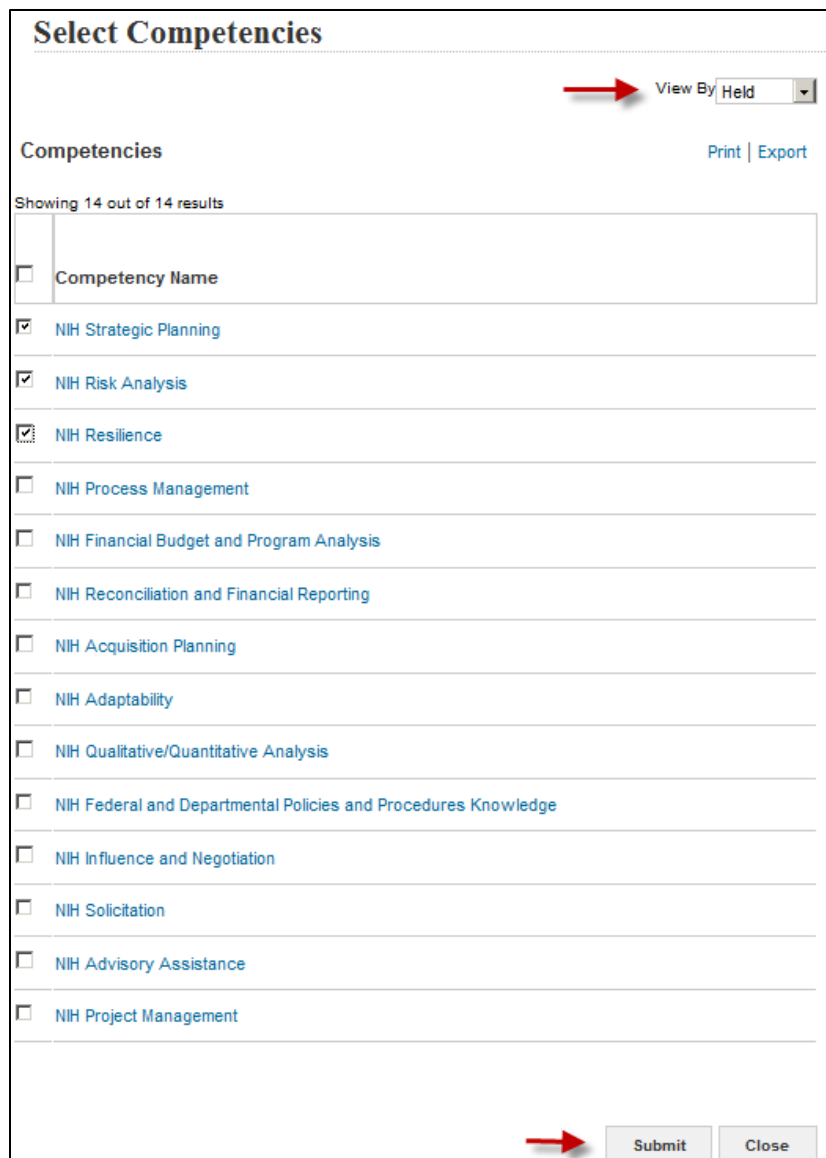
No items found

Raters [Add Rater](#)

No items found

Select all or some of the competencies in the **Select Competencies** pop-up window by clicking the appropriate checkbox. You may filter the list of competencies by **Held** or **Required** using the **View By** drop-down menu.

14. When finished, click **Submit**.



Select Competencies

View By **Held**

Competencies [Print](#) | [Export](#)

Showing 14 out of 14 results

<input type="checkbox"/>	Competency Name
<input checked="" type="checkbox"/>	NIH Strategic Planning
<input checked="" type="checkbox"/>	NIH Risk Analysis
<input checked="" type="checkbox"/>	NIH Resilience
<input type="checkbox"/>	NIH Process Management
<input type="checkbox"/>	NIH Financial Budget and Program Analysis
<input type="checkbox"/>	NIH Reconciliation and Financial Reporting
<input type="checkbox"/>	NIH Acquisition Planning
<input type="checkbox"/>	NIH Adaptability
<input type="checkbox"/>	NIH Qualitative/Quantitative Analysis
<input type="checkbox"/>	NIH Federal and Departmental Policies and Procedures Knowledge
<input type="checkbox"/>	NIH Influence and Negotiation
<input type="checkbox"/>	NIH Solicitation
<input type="checkbox"/>	NIH Advisory Assistance
<input type="checkbox"/>	NIH Project Management



Submit **Close**

15. Add raters for the multi-rater assessment by clicking **Add Rater**.


New Multi-Rater Assessment

Type: Competency-based

MRA Title*:

Description:  
Character Limit: 255


Ratee: NIH Learner

Closes On: 

Assessment Results: ☒ Show Individual Comments
☒ Show Individual Rating Levels

Competencies to be Assessed [Add Competency](#) | [Print](#) | [Export](#)

Competency Name	Target	Actions
NIH Strategic Planning	2-Novice	Remove Competency
NIH Risk Analysis	3-Intermediate	Remove Competency
NIH Resilience	5-Expert	Remove Competency

Raters  [Add Rater](#)

No items found

16. Enter the rater's name in the search box and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

17. Select the checkbox in front of the desired rater(s) and click Select.

Search for People

Name(s)

NIH Manager

Advanced Search

Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon

Search

Search Results

Modify Table

Showing 1 out of 1 results

<input type="checkbox"/>	Last Name	First Name	Username	Person Type	Person ID	Organization	Location	Job
<input checked="" type="checkbox"/>	Manager	NIH	NIHMANAGER	Other	00165949	HNAM6		

Select

Close

18. When you are finished adding competencies and raters, click **Save**.

New Multi-Rater Assessment

Type

Competency-based

MRA Title*

NIH Test Competency

Description

NIH Test Competency

Character Limit:255

Ratee

NIH Learner

Closes On

01/27/2015

Assessment Results

☒ Show Individual Comments

☒ Show Individual Rating Levels

Competencies to be Assessed


[Add Competency](#) | [Print](#) | [Export](#)

Competency Name	Target	Actions
NIH Strategic Planning	2-Novice	Remove Competency
NIH Risk Analysis	3-Intermediate	Remove Competency
NIH Resilience	5-Expert	Remove Competency

Raters

[Add Rater](#) | [Print](#) | [Export](#)

Rater Name	Person Type	Actions
NIH Manager	Other	Remove Rater



Save

Cancel


19. You will be asked to confirm whether you want to submit the assessment for the rater approval.

NOTE: The LMS does not save drafts. You must complete this entire process in order for the assessment to be saved. If you stop (or timeout) in the middle, you will have to repeat these steps.

20. Click Yes.

Submit for Rater Approval

Are you sure you want to submit this assessment for rater approval?



Yes

No

SURVEY MANAGEMENT

As a People Administrator, you are able to create and manage surveys. The content for the survey must first be created and modified by an LMS Content Administrator.

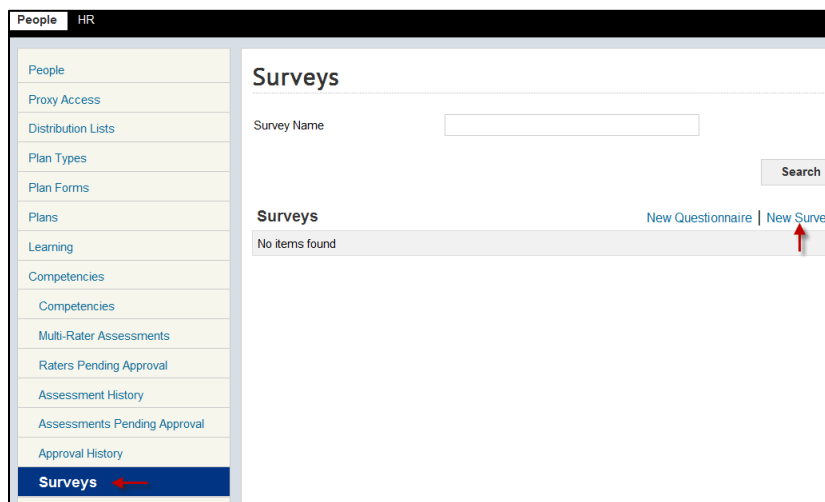
You must assign surveys to potential respondents at the time you distribute it. Designated respondents can then choose to accept or decline the survey.

CREATE AND DISTRIBUTE A SURVEY

1. Select the **Admin** Icon.



2. Click the **Competencies** link towards the left of the page.
3. Click the **Surveys** link.
4. Click the **New Survey** link on the right side of the page.




5. Enter the **Name** of the survey and a **Description**.
6. Enter the end date of the survey in the **Closes On** field.
7. The **Domain** should always be NIH.

8. Click **Next**.


Survey Creation and Distribution


Name*

Description
Character Limit:255
Remaining character count: 244

Closes On 

Status

Domain* 




9. Click **Add Questionnaire**.


Survey Details and Distribution: New Survey


Name*

Description
Character Limit:255

Closes On 

Status

Domain* 

Questionnaire Content  [Add Questionnaire](#)

No items found

Respondents [Add Respondents](#)

No items found

10. Browse the **Production Repository** and select a questionnaire that has been prepared in advance by a Content Administrator. Those that are available will have a radio button to allow you select them.
11. Click **Finish**.

Attach Evaluation:

Search **Browse**

Production Repository

Select	Item
<input type="checkbox"/>	Production
<input type="checkbox"/>	HHS U
<input checked="" type="checkbox"/>	NIH
<input type="checkbox"/>	NIH Simplified Acquisition & Delegated Procurement- UPKs
<input type="checkbox"/>	No Fear Act 10/23/2013
<input type="checkbox"/>	OLSA Test Folder
<input checked="" type="checkbox"/>	test [SCORM Package, Version:]
<input type="checkbox"/>	SAIC-Frederick, Inc.
<input type="checkbox"/>	SkillSoft

12. You may also click the **Search tab** to locate the survey using a name search.
13. Enter search criteria and click **Search**.
14. Select the survey by clicking on the **Radio button**.
15. Click **Finish**.

Attach Evaluation:



Search

Browse

Name	NIH Information	Version Number	
Content Format	-Select One-	Content Type	-Select One-
Language		Author	
Keywords		Folder Name	
Available From >=		Available From <=	
Last Modified On >=		Last Modified On <=	
Competency		Owner	
Content Provider	-Select One-	Delivery Vendor	-Select One-
Include non-scoring content modules <input checked="" type="checkbox"/>			



Search

Contents

Showing 2 out of 2 results

Select	Name	Version Number	Content Format	Folder Name
<input checked="" type="radio"/>	NIH Information Security Awareness Annual Refresher Course	FY08	SCORM Package	IT security
<input type="radio"/>	NIH Information Security Awareness Annual Refresher Course FY09	FY09	SCORM Package	IT security



Finish

Close

16. Click **Add Respondents** once the questionnaire content is attached to designate the individuals who should respond.

Survey Details and Distribution: New Survey

Name*

New Survey

Description

New Survey

Character Limit:255

Closes On

01/26/2015

Status

Draft

Domain*

NIH

Questionnaire Content

Questionnaire	Actions
NIH Information Security Awareness Annual Refresher Course	Preview ✕

Respondents

[Add Respondents](#)

No items found

Save For Later

Cancel

17. Click the **Advanced Search** link.

NOTE: Since you will likely be searching for multiple people with common criteria, such as organization code or manager, the Advanced Search will be more effective than the default Simple search.

18. Select the checkbox(es) next to the desired respondent(s) in the **Search Results** table, and then click **Select**.

Search for People

Name(s)

NIH Learner; NIH Manager

Advanced Search

Enter one or more last names or full names separated by semi-colons (;). First names and partial values do not return results.
Example:
Williams;
Bob Smith;
Jones,
Sharon

Search

Search Results

Modify Table

Showing 2 out of 2 results

	Last Name	First Name	Username	Person Type	Person ID	Organization	Location	Job
<input checked="" type="checkbox"/>	Learner	NIH	NIHLEARNER	Other	00165395	HNAM8		
<input checked="" type="checkbox"/>	Manager	NIH	NIHMANAGER	Other	00165949	HNAM8		

Select

Close

19. Once you have the questionnaire and the respondents selected, you are ready to publish the survey.

IMPORTANT! You cannot publish a survey until you have specified both the questionnaire and the respondents for the survey. You should double-check that all respondents are included because you cannot add more respondents to a survey once distributed.

20. Do one of the following:

- Click **Save for Later** – to save the survey in Draft status for future editing.
- Click **Save and Distribute** – to distribute the survey to the selected respondents.

Survey Details and Distribution: New Survey

Name*

Description
Character Limit:255

Closes On

Status

Domain*

Questionnaire Content

Questionnaire	Actions
NIH Information Security Awareness Annual Refresher Course	Preview

Respondents

[Add Respondents](#) | [Modify Table](#)

First Name	Last Name	User Name	Organization Name	Status	Actions
NIH	Manager	NIHMANAGER	HNAM6	Pending	
NIH	Learner	NIHLEARNER	HNAM6	Pending	

VIEW A SURVEY

1. Select the **Admin** Icon.



2. Click the **Competencies** link towards the left of the page.
3. Click the **Surveys** link.
4. Enter the name of the survey you are looking for and click **Search**.

5. Under the **Actions** column, you will see various options, depending on the status of the survey.

People HR

People
Proxy Access
Distribution Lists
Plan Types
Plan Forms
Plans
Learning
Competencies
Competencies
Multi-Rater Assessments
Raters Pending Approval
Assessment History
Assessments Pending Approval
Approval History
Surveys

Surveys

Survey Name Search

[New Questionnaire](#) | [New Survey](#) | [Modify Table](#)

Name	Status	Create Date	Distribution Date	Close Date	Domain	Number of Completions	Actions
NIH Workforce Survey	Completed	12/13/2009		12/25/2009	NIH	0	View Distribution
NIH Accessible Word Documents Survey	In Progress	12/23/2014	12/23/2014		NIH	0	View Distribution Close Survey

- a. **View Distribution** allows you to see who received the survey and whether respondents have completed it.
- b. **Close Survey** allows you to end or “close” the survey.

MANAGING LEARNING

The People Administrator – The Learning tab provides access to learners' enrollments, transcript, certifications and curricula, continuing education credits, and learning plan information.

ENROLLMENTS

An Enrollment is an offering that a learner is registered for, but has not completed. The following instructions will detail how you can view and manage a learner's enrollments.

VIEW AND MANAGE ENROLLMENTS

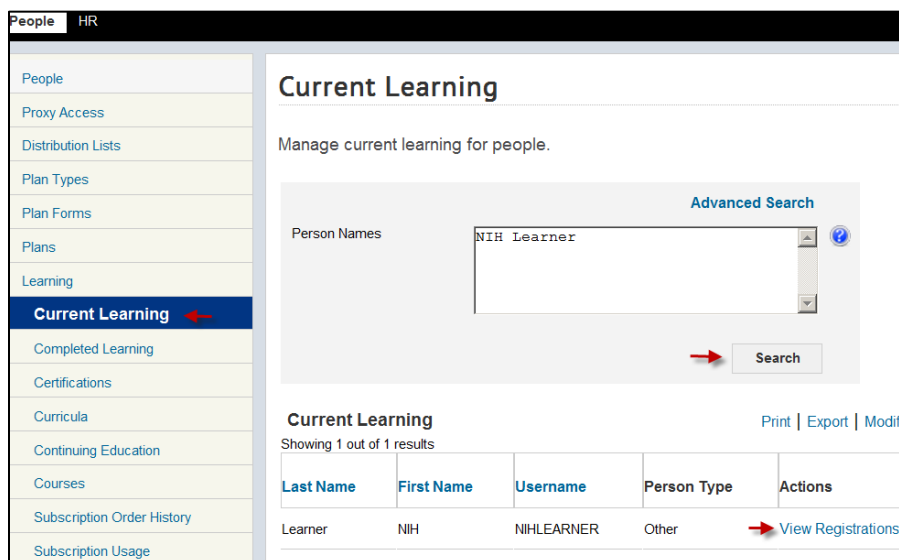
1. Select the **Admin** Icon.



2. Click on the **Learning** link.
3. Select **Current Learning** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Registrations** to the right of the correct learner.



Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Registrations

6. From the **View Current Learning** menu, select one of the following to change your view of current learning: All, Pending Approval, Approved, or Unscheduled.

Current Learning for NIH Learner											
										View	All
										Print	All Pending Approval Approved Unscheduled
Select	Title	Delivery Type	Start Date	Location	Facility	Status	Merged From	Mandatory		Actions	Package
<input type="checkbox"/>	Alternative Dispute Resolution (ADR)	Online Training				Confirmed		<input type="checkbox"/>		Actions	
<input type="checkbox"/>	Books 24x7	Online Training				Confirmed		<input type="checkbox"/>		Actions	
<input type="checkbox"/>	NIH Clinical Center: Fire Safety Training for Health Care Personnel	Online Training				Confirmed		<input type="checkbox"/>		Actions	
<input type="checkbox"/>	NIH Supervisory Essentials Training	Instructor led	03/10/2015		NIH Training Center	Pending Approval		<input type="checkbox"/>		Actions	

NOTE: From this screen, you can verify whether a learner is enrolled in a particular class. Additionally, you may click the **Title** of an enrollment to view related details.

From the Actions column of the Enrollments table, you have the following options:

- **View Learning Assignments** - allows you to view any learning assignments for a course, attempts on learning content, the learner's completion status and score.
- **Mark Complete**- allows you to indicate the completion status of a course. This functionality can be used if an online course does not automatically complete successfully. Instructor-led classes should be marked complete by the Training Administrator responsible for the class.

IMPORTANT! Be very careful using this function. You should have a business process in place to ensure the learner really did complete the course. As an administrator, you are bound to maintain the integrity of the system.

- **Drop**- will allow you to cancel the registration of a learner.

IMPORTANT! This action does not remove any financial obligation for the learner. Any financial obligations must be cancelled to keep the learner's organization from being charged.

- **Approve/Reject as secondary approver** – Allows you to approve or reject the training the learner is registering for.

Current Learning for NIH Learner

View All Profile Quicklink
Certifications

Current Learning

Print | Export

Actions
View Learning Assignments
Mark Complete
Drop

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Merged From	Mandatory	Actions
<input type="checkbox"/>	Alternative Dispute Resolution (ADR)	Online Training				Confirmed		<input type="checkbox"/>	Actions <small>Actions</small>
<input type="checkbox"/>	Books 24x7	Online Training				Confirmed		<input type="checkbox"/>	Actions

<input type="checkbox"/>	NIH Clinical Center: Fire Safety Training for Health Care Personnel	Online Training				Confirmed		<input type="checkbox"/>	Actions Drop Reject Approve
<input type="checkbox"/>	NIH Supervisory Essentials Training	Instructor led	03/10/2015	NIH Training Center		Pending Approval		<input type="checkbox"/>	Actions
<input type="checkbox"/>	Performance Management Appraisal Program (PMAP) for Employees	Online Training				Confirmed		<input type="checkbox"/>	Actions
<input type="checkbox"/>	The No FEAR Act	Online Training				Confirmed		<input type="checkbox"/>	Actions

Approve Selected
Approve All
Reject Selected
Reject All

TRANSCRIPTS

A transcript is a record of training completed by a learner. Transcripts may contain Department of Health and Human Services (HHS) training and external training, such as college coursework. Because the LMS is a department-wide system, transcripts will go with an employee if he/she moves to another agency within HHS.

NOTE: Because the LMS is still a relatively new system and not all historic training has been migrated, some records may not appear on the LMS transcript. If you have a question about whether something should be appearing on the LMS transcript, please submit a ticket to the HR Systems Support Help Desk at:

https://nihohrweb.nih.gov:1010/WITS_IntraHR/index.aspx.

The following instructions will show you how to view, edit, delete, and add learning to a learner's Transcript.

VIEW A LEARNER TRANSCRIPT

1. Select the **Admin** icon.



2. Click the **Learning** link.
3. Click **Completed Learning** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Completed Learning** to the right of the correct learner.

People HR

Completed Learning

Manage completed learning for people.

Advanced Search

Person Names NIH Learner

Search

Completed Learning Add Completed Learning | Print | Export | Modify Table

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Completed Learning

6. Set the date range for transcript items to be displayed and click **Search**.

Completed Learning: NIH Learner

Completed learning is a list of all your completed courses and the results achieved. To export your transcript to Excel, click the Export link. To access and launch content for a completed online course, click the View Learning Assignments link.

Active | Inactive

From 10/28/2014 To 01/26/2015

Delivery Type All Search

Profile Quicklinks

- Certifications
- Curricula
- Competencies
- Current Learning
- Completed Learning
- Continuing Education Status
- Profile Snapshot
- Multitracer Assessment
- Plans

Completed Learning Add Completed Learning | Print | Export | Modify Table

Showing 3 out of 3 results

Item Name	Status	Marked Complete By	Ended/Completed On Date	Actions
test006	Successful On: 12/12/2014 Score: 0			View Details Edit Delete Print Certificate
test005	Successful On: 12/12/2014			View Details Edit

NOTE: The default date range of the transcript view is one year. To view training events that were completed more than 90 days in the past, you must adjust the **To Date** field.

Additional Tips:

- You can view details of a training item by clicking on its title.

DELETE A TRANSCRIPT ITEM

1. Select the **Admin** icon.



2. Click the **Learning** link.
3. Click **Completed Learning** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Completed Learning** to the right of the correct learner.

The screenshot shows the 'Completed Learning' page in the HHS Learning Portal. On the left is a navigation menu with 'Completed Learning' highlighted. The main content area has a search box with 'NIH Learner' entered. A red arrow points to the 'Search' button. Below the search box is a table with one result. A red arrow points to the 'View Completed Learning' link in the 'Actions' column.

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Completed Learning

6. Click **Actions** link on the right for the transcript item being deleted.
7. Click **Delete** in the Actions popup window.

Completed Learning: NIH Learner

Completed learning is a list of all your completed courses and the results achieved. To export your transcript to Excel, click the Export link. To access and launch content for a completed online course, click the View Learning Assignments link.

Active | Inactive

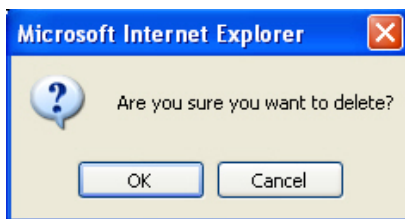
From: 10/28/2014 To: 01/26/2015
 Delivery Type: All Search

Profile Quicklinks
[Certifications](#)
[Curricula](#)
[Competencies](#)
[Current Learning](#)
[Completed Learning](#)
[Continuing Education Status](#)
[Profile Snapshot](#)
[Multirater Assessment](#)
[Plans](#)

Completed Learning Add Completed Learning | Print | Export | Modify Table
 Showing 3 out of 3 results

Item Name	Status	Marked Complete By	Ended/Completed On Date	Actions
test006	Successful On: 12/12/2014 Score: 0			View Details Edit Delete Print Certificate
test005	Successful On: 12/12/2014 Score: 0			View Details Edit Delete Print Certificate

8. If you are sure this is the item you want to delete, click **OK** from the dialog box. The screen will refresh and deleted transcript items will move to the Inactive tab.



NOTE: A copy of deleted transcript items is permanently kept on the **Inactive** tab.

Completed Learning: NIH Learner

Completed learning is a list of all your completed courses and the results achieved. To export your transcript to Excel, click the Export link. To access and launch content for a completed online course, click the View Learning Assignments link.

Active | **Inactive**

From: 10/28/2014 To: 01/26/2015
 Delivery Type: All Search

Profile Quicklinks
[Certifications](#)
[Curricula](#)
[Competencies](#)
[Current Learning](#)
[Completed Learning](#)
[Continuing Education Status](#)
[Profile Snapshot](#)
[Multirater Assessment](#)
[Plans](#)

Completed Learning Add Completed Learning | Print | Export | Modify Table
 Showing 3 out of 3 results

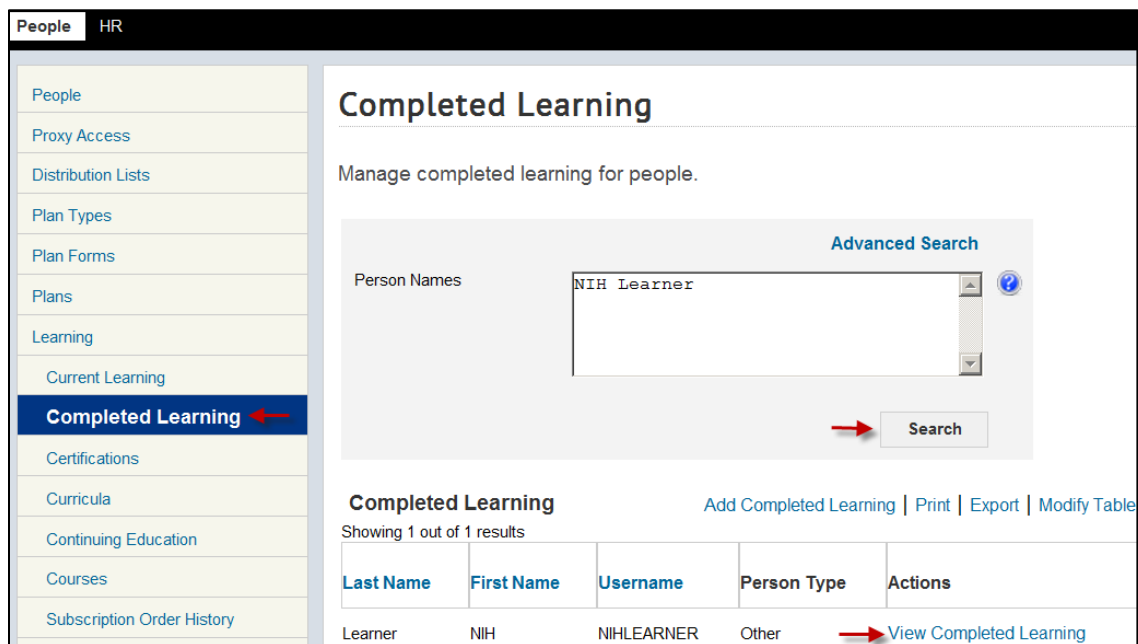
Item Name	Status	Marked Complete By	Ended/Completed On Date	Actions
TMH this is a test 2014-12-14	Not Active			View Details Print Certificate
NIEHS Environmental Management System (EMS) This course provides an overview of the NIEHS Environmental Management System and serves to inform employees and contractors of the impacts their work may have on the surrounding environment. Course completion is required for all	Not Active			View Details Print Certificate

EDIT A TRANSCRIPT ITEM

1. Select the Admin Icon.



2. Click the **Learning** link.
3. Click **Completed Learning** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.
5. **NOTE:** See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.
6. Click **View Completed Learning** to the right of the correct learner.



People HR

People
Proxy Access
Distribution Lists
Plan Types
Plan Forms
Plans
Learning
Current Learning
Completed Learning
Certifications
Curricula
Continuing Education
Courses
Subscription Order History

Completed Learning

Manage completed learning for people.

Advanced Search

Person Names NIH Learner

Search

Completed Learning Add Completed Learning | Print | Export | Modify Table

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Completed Learning

7. Click Actions link on the right for the transcript item being updated.
8. Click Edit in the Actions popup window.

<p>Creating Your Individual Development Plan</p> <p>An Individual Development Plan (IDP) outlines career goals and is a developmental action plan to move you from where you are, to where you would like to be, or to where you need to be. It provides systematic steps to improve performance and build strengths related to your current job, and to meet your career goals. The goals of an IDP are developed by you with input from your supervisor. The IDP links your career interests and needs to organizational priorities. In this course, you will learn strategies for developing your own IDP and career goals. It will assist you assessing your current strengths and development needs, equipping you with the knowledge to help you move forward on your professional development path. Individuals with disabilities who need Sign Language Interpreters or reasonable accommodation to participate should contact the Federal Relay (1-800-877-8339) at least 5 days in advance. Bldg: Rockledge II (6701 Rockledge Drive), Room 9100/9104</p>	<p>Successful On: 01/26/2015 Score: 0</p>	<p>View Details Edit Delete Print Certificate</p>
---	---	---

9. Change any of the fields that need to be corrected and click Save.

NOTE: You should be able to provide documentation to verify any changes made to a transcript of a learner. Be sure you complete all the EHRI required fields in **red**.

ADD LEARNING TO A TRANSCRIPT: SINGLE LEARNER

Use this method to add learning to a single learner's transcript.

IMPORTANT! Guidelines for verifying completed training may vary by IC, office, division, etc. Please be sure to check with your organization to determine the process for verifying the completion of training prior to manually entering it into a learner's LMS record.

1. Select the **Admin** Icon.



2. Click the **Learning** link.

3. Click **Completed Learning** in the left navigation menu.

4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Completed Learning** to the right of the correct learner.

People HR

People
Proxy Access
Distribution Lists
Plan Types
Plan Forms
Plans
Learning
Current Learning
Completed Learning
Certifications
Curricula
Continuing Education
Courses
Subscription Order History

Completed Learning

Manage completed learning for people.

Advanced Search

Person Names

Search

Completed Learning [Add Completed Learning](#) | [Print](#) | [Export](#) | [Modify T](#)

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Completed Learning

6. Click **Add Completed Learning**.

7. Click **Use Existing Item** to add courses to the learner's transcript that already exist on someone else's transcript or in the course catalog.

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

Add Completed Learning to Learner's Transcript

For information on EHRI values, please refer to the [OPM Guide to Data Standards](#).

Use Existing Item

Item/Event Name*

Description

Character Limit: 1000

Offering Start Date

Ended/Completed On Date

Registration Date

Marked Complete Date*

8. Enter the course **Name** in the name field and click **Search**.

NOTE: You may also search by the course **ID**.

Search for Items to Add a Completed Learning to Learner's Transcript

Name

NIH LMS

ID

☐ Search Existing Completed Learning Items

☒ Search Catalog

 **Search**

[Print](#) | [Export](#)

Showing 3 out of 3 results

	Title	Version	Description	Course ID
<input checked="" type="checkbox"/>	NIH LMS Learning Administrator	FY15	This two-day course provides an introduction to the LMS and the permissions associated with Learning and Content Administrators. Hands-on exercises are performed in a training environment to simulate basic LMS functions, which include creating and modifying courses and their offerings as a Training Administrator, and working with online courses as a Content Administrator. Materials are provided to the learner in class and support for administrators is available after training via tip sheets, help desk, and access the NIH LMS Implementation team. ***ALL REQUESTS FOR PERMISSIONS MUST BE MADE WITHIN 6 MONTHS OF LMS TRAINING. NIH LMS Administrator permissions in the HHS Learning Portal are now	NIHTC1003

NOTE: Remember that you can use the percent symbol (%) as a wildcard. You may also search for courses that are not in the LMS catalog but may have been added to a learner's transcript by clicking the **Search Existing Completed Course Items** radio button.

- Click on the checkbox to the left of the course you wish to add to the learner's transcript. This will close the window and take you back to the previous screen.

NOTE: The screen will now be pre-populated with course information such as the title, description, and course ID.

- Enter additional data into all appropriate fields.

Edit Item Added to Completed Learning

[Use Existing Item](#)

Item/Event Name	NIH LMS Learning Administrator
Version	FY15
Description	<p>This two-day course provides an introduction to the LMS and the permissions associated with Learning and Content Administrators. Hands-on exercises are performed in a training environment to simulate basic LMS functions, which include creating and modifying courses and their offerings as a Training Administrator, and working with online courses as a Content Administrator. Materials are provided to the learner in class and support for administrators is available after training via tip sheets, help desk, and access the NIH LMS Implementation team.</p> <p>***ALL REQUESTS FOR PERMISSIONS MUST BE MADE WITHIN 6 MONTHS OF LMS TRAINING. NIH LMS Administrator permissions in the HHS Learning Portal are now managed through WITS.</p> <p>Detailed instructions for obtaining LMS administrator permissions (both OHR and non-OHR staff) are located on the HR Systems Support website at https://intrahr.od.nih.gov/hrsystems/newaccounts.htm.</p>
Offering Start Date	<input type="text"/>
Ended/Completed On Date	<input type="text"/>
Registration Date	<input type="text"/>
Marked Complete Date*	<input type="text"/>
Start Time (HH:MM)	<input type="text"/>
End Time (HH:MM)	<input type="text"/>
Duration (HH:MM)	<input type="text"/>
Delivery Type	<input type="text" value="-Select One-"/>
Course ID	NIHTC1003
Location	<input type="text"/>

(See Appendix B for explanations of data fields required for EHRI reporting.)

IMPORTANT! All fields in red with an asterisk (*) require data in order to save changes. Marked Complete Date is a required field.

- Enter the learner's score and grade at the bottom of the screen, under the **Learners** section, if applicable.

NOTE: It's a good idea to delete the "0" that defaults in the Score field so that learners do not become concerned about seeing a "0" score on their transcript.

Learners				Modify Table
Name	Score	Grade	Completion Status	
NIH Learner	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Successful"/>	

- After all available course data is entered, click **Save**.

ADD LEARNING TO A TRANSCRIPT: MULTIPLE LEARNERS

Use this method if you would like to add a transcript item to multiple learners.

1. Select the **Admin** icon.



2. Click the **Learning** link.
3. Click **Completed Learning** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.


5. Click **Add Completed Learning**.

The screenshot shows the 'Completed Learning' page in the HHS Learning Portal. On the left is a navigation menu with options like 'People', 'Proxy Access', 'Distribution Lists', 'Plan Types', 'Plan Forms', 'Plans', 'Learning', 'Current Learning', 'Completed Learning' (highlighted with a red arrow), 'Certifications', 'Curricula', 'Continuing Education', 'Courses', and 'Subscription Order History'. The main content area is titled 'Completed Learning' and includes a sub-header 'Manage completed learning for people.' Below this is a search box labeled 'Person Names' with the text 'NIH Learner' entered. To the right of the search box is an 'Advanced Search' link. A red arrow points to the 'Search' button. Below the search box, there are links for 'Add Completed Learning', 'Print', 'Export', and 'Modify T'. A table shows one result for 'NIH Learner' with columns for 'Last Name', 'First Name', 'Username', 'Person Type', and 'Actions'. The 'Actions' column contains a link 'View Completed Learning'.

6. Click **Use Existing Item**.


Add Completed Learning to Learner's Transcript


For information on EHRI values, please refer to the [OPM Guide to Data Standards](#).


 [Use Existing Item](#)


Item/Event Name*

Description
Character Limit: 1000

Offering Start Date 

Ended/Completed On Date 

Registration Date 

Marked Complete Date* 

7. Enter the course **Name** in the name field and click **Search**.

NOTE: You may also search by the course **ID**.


Search for Items to Add a Completed Learning to Learner's Transcript

Name

ID

☐ Search Existing Completed Learning Items

☒ Search Catalog

 [Search](#)

[Print](#) | [Export](#)

Showing 3 out of 3 results

	Title	Version	Description	Course ID
<input checked="" type="checkbox"/>	NIH LMS Learning Administrator	FY15	This two-day course provides an introduction to the LMS and the permissions associated with Learning and Content Administrators. Hands-on exercises are performed in a training environment to simulate basic LMS functions, which include creating and modifying courses and their offerings as a Training Administrator, and working with online courses as a Content Administrator. Materials are provided to the learner in class and support for administrators is available after training via tip sheets, help desk, and access the NIH LMS Implementation team. ***ALL REQUESTS FOR PERMISSIONS MUST BE MADE WITHIN 6 MONTHS OF LMS TRAINING. NIH LMS Administrator permissions in the HHS Learning Portal are now managed through WiTS. Detailed instructions for obtaining LMS administrator permissions (both OHR and non-OHR staff) are located on the HR Systems Support website at https://intrabr.od.nih.gov/hrsystems/newaccounts.htm	NIHTC1003

NOTE: Remember that you can use the percent symbol (%) as a wildcard. You may also search for courses that are not in the LMS catalog but may have been added to a learner's transcript by clicking the **Search Existing Completed Course Items** radio button. If the course cannot be found in the LMS catalog or another learner's transcript; close the window and manually input the course information.






- Click on the checkbox to the left of the course you wish to add to the transcript of the learners. This will close the window and take you back to the previous screen.

NOTE: The screen will now be pre-populated with course information such as the title, description, and course ID.

- Enter additional data into all appropriate fields.

Edit Item Added to Completed Learning

[Use Existing Item](#)

Item/Event Name	NIH LMS Learning Administrator
Version	FY15
Description	<p>This two-day course provides an introduction to the LMS and the permissions associated with Learning and Content Administrators. Hands-on exercises are performed in a training environment to simulate basic LMS functions, which include creating and modifying courses and their offerings as a Training Administrator, and working with online courses as a Content Administrator. Materials are provided to the learner in class and support for administrators is available after training via tip sheets, help desk, and access the NIH LMS Implementation team.</p> <p>***ALL REQUESTS FOR PERMISSIONS MUST BE MADE WITHIN 6 MONTHS OF LMS TRAINING. NIH LMS Administrator permissions in the HHS Learning Portal are now managed through WITS.</p> <p>Detailed instructions for obtaining LMS administrator permissions (both OHR and non-OHR staff) are located on the HR Systems Support website at https://intrahr.od.nih.gov/hrsystems/newaccounts.htm.</p>
Offering Start Date	<input type="text"/> 
Ended/Completed On Date	<input type="text"/> 
Registration Date	<input type="text"/> 
Marked Complete Date*	<input type="text"/>  
Start Time (HH:MM)	<input type="text"/>
End Time (HH:MM)	<input type="text"/>
Duration (HH:MM)	<input type="text"/>
Delivery Type	<input type="text" value="-Select One-"/>
Course ID	NIHTC1003

- Complete all fields manually for the course being added.

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

(See Appendix B for examples of the proper values that should be entered in fields that are prefixed with the label EHRI.

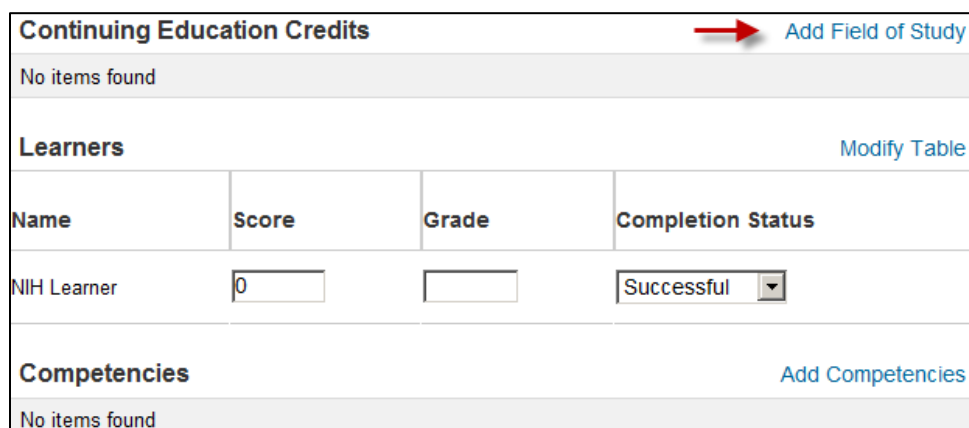
For courses entered manually, use the ID number that the training entity has assigned to it. If no ID has been assigned, you need to create one. Begin all IDs with NIH followed by a logical numbering system. Each ID must be unique in the LMS.

ADDING A FIELD OF STUDY TO THE NEW TRANSCRIPT ITEM (OPTIONAL)

IMPORTANT! When using the “Use Existing Item” the Add Field of Study link is not available.

This is required for courses that have credits associated with them such as supervisor training.

1. Click **Add Field of Study**.



Continuing Education Credits [Add Field of Study](#)

No items found

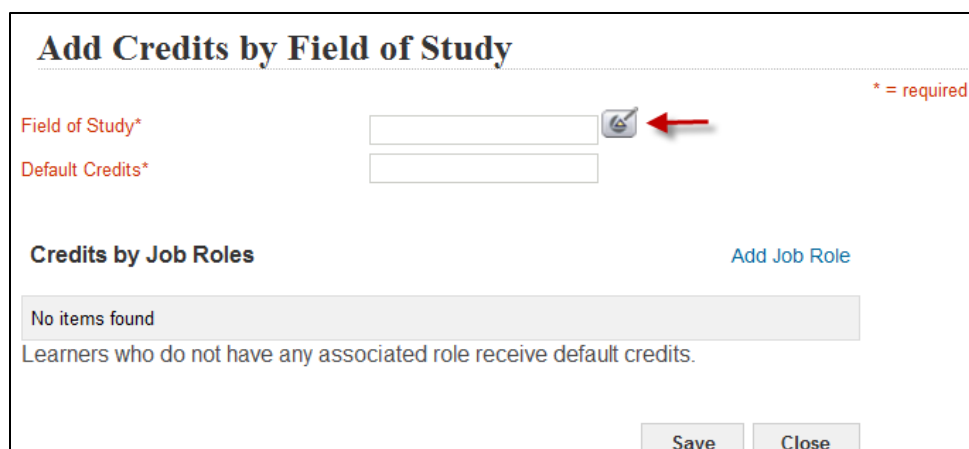
Learners [Modify Table](#)

Name	Score	Grade	Completion Status
NIH Learner	0		Successful

Competencies [Add Competencies](#)


No items found

2. Click the **Field of Study** picker icon to open the Select Field of Study screen.



Add Credits by Field of Study

* = required

Field of Study* 

Default Credits*

Credits by Job Roles [Add Job Role](#)

No items found

Learners who do not have any associated role receive default credits.

[Save](#) [Close](#)

3. Enter the name of the field of study you wish to add then click Search.
4. Click the **checkbox** to the left of the Field of Study name.

Select Field of Study

Name

Description

[Configure](#) | [Save Search Query](#) 

Select Field of Study

[Print](#) | [Export](#) | [Modify Table](#)


Showing 3 out of 3 results


	Name	Description
<input type="checkbox"/>	NIH Acquisition CLPs	This field of study is to track CLPs that can be used toward acquisition certifications
<input checked="" type="checkbox"/>	NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH
<input type="checkbox"/>	NIH Technical Writing	

5. Enter the number of credits that will be given by default in the **Default Credits** field.
6. To add credits based on Job Roles, click **Add Job Role**. (OPTIONAL)

Add Credits by Field of Study

Field of Study*

Default Credits* 

Credits by Job Roles  [Add Job Role](#)

No items found

Learners who do not have any associated role receive default credits.

7. Click the **Job Role pick button**.

Define Credits by Job Roles

* = required

Job Role*


Credits*




8. Enter the name of the job role you wish to add then click **Search**.
9. Click the **checkbox** to the left of the job role name then click OK in the popup window.

Select Role



Name

[Configure](#) | [Save Search Query](#) 

1 2 3 4 5 ... Next 

[Print](#) | [Export](#) | [Modify Table](#)

Showing first 25 out of 201 results

Select	Name
 	NIH Administrative Officer
<input type="checkbox"/>	NIH Administrative Officer (GS-11)
<input type="checkbox"/>	NIH Administrative Officer (GS-12)

10. Enter the number of credits in the **Credits field**.
11. Click **Save**.

Define Credits by Job Roles

* = required

Job Role*

Credits*

12. You may continue to add additional job roles and related credits by repeating steps 6 through 11.

Add Credits by Field of Study

* = require

Field of Study*

Default Credits*

Credits by Job Roles [Add Job Role](#)

Job	Credits	Actions
NIH-Buyer	2	Edit Delete

Learners who do not have any associated role receive default credits.

13. Your Field of Study will now appear on the Add Completed Course to Learner's Transcript screen.

Continuing Education Credits			Add Field of Study
Field of Study	Description	Default Credits	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	3	Edit Delete
Learners			Modify Table
Name	Score	Grade	Completion Status
NIH Learner	<input type="text" value="0"/>	<input type="text"/>	Successful <input type="button" value="v"/>

14. You may Edit or Delete the Field of Study by selecting the appropriate link in the **Actions** column.

ADDING A COMPETENCY TO A NEW TRANSCRIPT ITEM (OPTIONAL)

1. Click **Add Competencies** found toward the bottom of the screen.

Continuing Education Credits[Add Field of Study](#)

No items found

Learners[Modify Table](#)

Name	Score	Grade	Completion Status
NIH Learner	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Successful"/>

Competencies[Add Competencies](#)

No items found


2. Enter the name of the competency in the **Competency Name** field.
3. Click **Search**.
4. Set the **Competency Level** from the drop-down menu.
5. Click the **checkbox** to the left of the Competency Name.


Add Competencies

No Competencies are attached to Offering:




No items found


Choose Competencies from the Search

Competency Name: 



[Print](#) | [Export](#)

	Competency Name	Competency Level
	NIH Communications	Fundamental Awareness  



6. Click **Done**.

Add Competencies


No Competencies are attached to Offering:

[Print](#) | [Export](#) | [Modify Table](#)


Competency Name	Competency Level	Actions
NIH Communications	Fundamental Awareness	Delete

Choose Competencies from the Search

Competency Name:



7. The competency has now been added to the transcript item.

Continuing Education Credits		Add Field of Study
No items found		
Competencies		Add Competencies Modify Table
Name	Competency Level	
NIH Communications 	Fundamental Awareness	
<div>Save Cancel</div>		

ASSIGNING THE LEARNERS TO RECEIVE THE TRANSCRIPT ITEM

1. Click **Add Learners** towards the bottom of the screen.

Continuing Education Credits	
No items found	
Learners	 Add Learners
No items found	

2. Enter criteria to search for a learner then click **Search**.

3. Click the **checkbox** to the left of the learner's name.

4. Click **Select**.

Search Person, Internal

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the **"Manager"** field, clicking t

Population* Internal

First Name NIH

Last Name Learner

Person ID

Username

Manager

Organization


Location

Domain

Person Type -Select One-

Security Roles -Select One-

Include All Suborganizations ☐



Search

Select

People
[Print](#) | [Export](#)

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNAM6		NIHMANAGER
<input type="checkbox"/>	NIH	Learner1NIDDK	LEARNER1NIDDK	Federal	00419681	HNK		



Select

Close

NOTE: You may add multiple learners at one time by selecting multiple checkboxes.

Select

People
[Print](#) | [Export](#)

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNAM6		NIHMANAGER
<input checked="" type="checkbox"/>	NIH	Learner1NIDDK	LEARNER1NIDDK	Federal	00419681	HNK		

Select

Close

- Verify that the Start Date, Date Marked Complete, Score, and Grade fields are showing the correct information.

NOTE: Remove zeros from the Score field if no assessment was given.

- After all available course data is entered, click **Save**.

Continuing Education Credits

No items found

Learners
[Add Learners](#) | [Modify Table](#)

Name	Start Date	Date Marked Complete	Score	Grade	Completion Status	Actions
NIH Learner	<input type="text"/>	<input type="text" value="01/29/2015"/>	<input type="text" value="0"/>		Successful	Delete
NIH Learner1NIDDK	<input type="text"/>	<input type="text" value="01/29/2015"/>	<input type="text" value="0"/>		Successful	Delete

Competencies

No items found

Notes

No items found

[Save](#)
[Cancel](#)

CERTIFICATIONS

As a People Administrator, you may view and manage certifications for learners within your organization.

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.

VIEW CERTIFICATIONS

1. Select the **Admin** icon.



2. Click the **Learning** link.
3. Select **Certifications** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Certifications** to the right of the correct learner.

People HR

- People
- Proxy Access
- Distribution Lists
- Plan Types
- Plan Forms
- Plans
- Learning
- Current Learning
- Completed Learning
- Certifications**
- Curricula
- Continuing Education
- Courses
- Subscription Order History
- Subscription Usage
- Competencies

Certifications

Manage Certifications & Curricula for people.

Advanced Search

Person Names

[Search](#)

[Print](#) | [Export](#) | [Modify Table](#)

Certifications

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Certifications

6. Select the **Certifications** tab (for HHS certifications) or **External Certifications** (for non-HHS certifications)

Certifications for NIH Learner

A certification or curriculum is a set of learning items configured in a selected path that must be completed in order to become "Acquired." Both track your progress as the items are completed.

Internal **External**

Name Show Required Certifications Only ☒

[Configure](#) | [Save Search Query](#) [Search](#)

[Grant Certifications](#) | [Add Certifications](#) | [Print](#) | [Export](#) | [Modify Table](#)

View [Active](#)

Internal Certifications

Showing 10 out of 10 results

Name	Version	Selected Path (% Complete)	Mastery Score	Status	Assigned By	Target Date	Actions
HHS Records Management for All Employees Certification	1.0	Recertification for HHS Records Management for All Employees	N/A	Discontinued	NIH Records Management reminder test (More)	12/19/2011	Actions
NIH Disability Awareness Training Certification	1.0	NIH Disability Awareness Training	N/A	Discontinued	NIH Learner	11/12/2010	Actions

Profile Quicklinks

- [Certifications](#)
- [Curricula](#)
- [Competencies](#)
- [Current Learning](#)
- [Completed Learning](#)
- [Education Status](#)
- [Assessment](#)

Actions

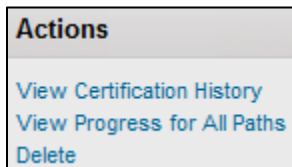
- [View Certification History](#)
- [View Progress for All Paths](#)
- [Delete](#)

The **External Certifications** tab will list any certifications the learner has completed that are not administered through the LMS. **Internal Certifications** refers to any certification that an LMS Training Administrator has created to administer through the LMS.

ACTIONS ASSOCIATED WITH CERTIFICATIONS

Clicking the Actions link in the Actions column will list a number of actions available depending on the status of the certification. The actions are outlined below:

- **View Certification History** – Shows all of the events, in chronological order, which took place during the acquisition of the certification.
- **View Progress for All Paths** – Shows a completion percentage bar indicating how far along the learner is in the certification.
- **Delete** – Allows the certification requirements to be deleted from learner.



GRANT INTERNAL CERTIFICATION

People Administrators may grant a certification for a learner, which means you mark the certification as complete, even though the learner has not completed all elements of the certification through the LMS. You may wish to do this if the learner has documented completion of equivalent learning outside the LMS. Your IC should have a business process in place for verifying actual course completion. Before you can grant completion of a certification, it must exist in the system. LMS Training Administrators have the ability to create certifications.

1. Select the **Admin** Icon.



2. Click the **Learning** link.
3. Select **Certifications** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

7. Click **View Certifications** to the right of the correct learner.

People HR

People
Proxy Access
Distribution Lists
Plan Types
Plan Forms
Plans
Learning
Current Learning
Completed Learning
Certifications
Curricula
Continuing Education
Courses
Subscription Order History
Subscription Usage

Certifications

Manage Certifications & Curricula for people.

Advanced Search

Person Names NIH Learner

Search

Certifications Print | Export | Modify

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Certifications

8. Click **Grant Certification**.

Certifications for NIH Learner

A certification or curriculum is a set of learning items configured in a selected path that must be completed in order to become "Acquired." Both track your progress as the items are completed.

Internal External

Name Show Required Certifications Only ☒

Configure | Save Search Query

Search

View Active

Profile Quicklinks
[Certifications](#)
[Curricula](#)
[Competencies](#)
[Current Learning](#)
[Completed Learning](#)
[Continuing Education Status](#)
[Profile Snapshot](#)
[Multirater Assessment](#)
[Plans](#)

Internal Certifications [Grant Certifications](#) | [Add Certifications](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 10 out of 10 results

Name	Version	Selected Path (% Complete)	Mastery Score	Status	Assigned By	Target Date	Actions
HHS Records Management for All Employees Certification	1.0	Recertification for HHS Records Management for All Employees	N/A	Discontinued	NIH Records Management reminder test (More)	12/19/2011	Actions

9. Enter the name of the certification in the **Name** field then click **Search**.

10. Select the **radio button** to the left of the certification you would like to grant and then click **Next**.

Grant Certifications

1.Select Certifications >>> 2.Grant Certifications

Name Updated On >=

Target Completion Duration <= Past Credit Duration <=

[Configure](#) | [Save Search Query](#) [Search](#)

Certifications [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Select	Name	Version	Description
	HHS Appropriations Law Certification	1.0	This certification requires HHS Appropriations Law to be completed within 30 days of assignment. This certification is required for specific NIH staff across NIH, including Contract Admin, Purchasers, Procurment, Budget, COTR, etc.

[Next](#) [Close](#)

NOTE: If you are granting a certification that has already been assigned to the learner, you will be asked to confirm that you want to continue with the Grant Certification process.

- Enter the date on which the learner acquired the certification (finished it) and the date the certification expires, then click **Finish**.

Grant Certification

1.Select Certification >>>

Granted Certifications [Print](#) | [Export](#)

Learner Name	Acquired On	Expiration Date
NIH Learner	<input type="text" value="04/02/2012"/>	<input type="text" value="04/02/2013"/>

[Finish](#) [Back](#) [Close](#) +

ASSIGN INTERNAL CERTIFICATION

A certification must first be created in the LMS by an LMS Training Administrator before it will be available for you to assign to a learner.

1. Select the **Admin** icon.



2. Click the **Learning** link.
3. Select **Certifications** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Certifications** to the right of the correct learner.

The screenshot shows the HHS Learning Portal interface. On the left is a navigation menu with links like People, Proxy Access, Distribution Lists, Plan Types, Plan Forms, Plans, Learning, Current Learning, Completed Learning, Certifications (highlighted with a red arrow), Curricula, Continuing Education, Courses, Subscription Order History, Subscription Usage, and Competencies. The main content area is titled "Certifications" and includes a sub-header "Manage Certifications & Curricula for people.". Below this is a search box labeled "Person Names" with the text "NIH Learner" entered. To the right of the search box is a red arrow pointing to a "Search" button. Below the search box is a table titled "Certifications" with the text "Showing 1 out of 1 results". The table has columns for Last Name, First Name, Username, Person Type, and Actions. The first row shows "Learner", "NIH", "NIHLEARNER", "Other", and a red arrow pointing to a "View Certifications" link. In the top right corner of the main content area, there are links for "Print", "Export", and "Modify".

6. Click **Add Certifications**.

Certifications for NIH Learner

A certification or curriculum is a set of learning items configured in a selected path that must be completed in order to become "Acquired." Both track your progress as the items are completed.

Internal **External**

Name Show Required Certifications Only ☒

[Configure](#) | [Save Search Query](#)

View **Active**

Internal Certifications [Grant Certifications](#) | [Add Certifications](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 11 out of 11 results

Name	Version	Selected Path (% Complete)	Mastery Score	Status	Assigned By	Target Date	Is Compliant	Actions
HHS Appropriations Law Certification	1.0	HHS Appropriations Law Online Course - 0% Completed	N/A	Acquired	NIH PeopleAdmin			Actions

Profile Quicklinks
[Certifications](#)
[Curricula](#)
[Competencies](#)
[Current Learning](#)
[Completed Learning](#)
[Continuing Education Status](#)
[Profile Snapshot](#)
[Multirater Assessment](#)
[Plans](#)

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

8. Click the **checkbox** to the left of the certification.

Select Certifications

Name Discontinued From >=

Updated On >= Target Completion Duration <=

Past Credit Duration <=

[Configure](#) | [Save Search Query](#)

Certifications [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

<input type="checkbox"/>	Name	Version	Available From	Discontinued From	Target Completion Duration	Expires In	Notify Before
<input checked="" type="checkbox"/>	HHS Appropriations Law Certification	1.0	03/09/2011		30 Days		

NOTE: If you are adding a certification that has already been assigned to the learner, you will receive an Add Certification Error (20882) Certification already exists in the same status.

CURRICULA

As a People Administrator, you may view and manage curricula for learners within your organization.

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

VIEW CURRICULA

1. Select the Admin Icon.



2. Click the Learning link.
3. Select Curricula in the left navigation menu.
4. Enter the learner's name in the search field and click Search.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Curricula** to the right of the correct learner.

The screenshot shows the HHS Learning Portal interface. At the top is the portal logo and navigation icons. Below the logo is a tabbed interface with 'People' and 'HR' tabs. A left-hand navigation menu lists various options: People, Proxy Access, Distribution Lists, Plan Types, Plan Forms, Plans, Learning, Current Learning, Completed Learning, Certifications, **Curricula** (highlighted with a red arrow), Continuing Education, Courses, Subscription Order History, Subscription Usage, and Competencies. The main content area is titled 'Curricula' and includes the subtitle 'Manage Certifications & Curricula for people.' Below this is a search section with a text input field containing 'NIH Learner' and a 'Search' button (highlighted with a red arrow). To the right of the search field is a link for 'Advanced Search'. Below the search section is a table titled 'Curricula' with columns: Last Name, First Name, Username, Person Type, and Actions. The table shows one result: 'Learner', 'NIH', 'NIHLEARNER', 'Other'. In the 'Actions' column for this row, there is a 'View Curricula' link (highlighted with a red arrow). Above the table are links for 'Print', 'Export', and 'Modify Ta'.

6. You will now see all of the curricula associated with the learner.

Curricula for NIH Learner

A certification or curriculum is a set of learning items configured in a selected path that must be completed in order to become "Acquired." Both track your progress as the items are completed.

View **Active**

Name Show Required Curricula Only ☒

[Configure](#) | [Save Search Query](#)

Curricula [Grant Curricula](#) | [Add Curricula](#) | [Print](#) | [Export](#) | [Modify T](#)

Showing 4 out of 4 results

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
LMS Training	<div><div></div></div> Path 1 - 0% Completed	Assigned	NIH Learner		Actions
NIAID Art of Leadership Cohort 21	Art of Leadership	Discontinued	Ann WITHINGTON		Actions
NIH NIBIB Budget Analysis Non-Technical Competency Training	<div><div></div></div> 3 Courses in this Module - 33% Completed	Acquired	Thomas HOLSCHER		Actions

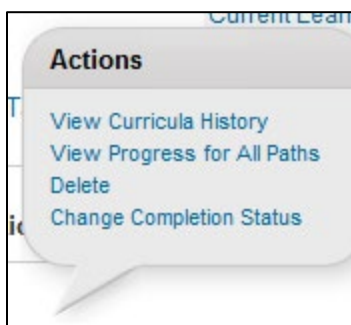
Profile Quicklinks
[Certifications](#)
[Curricula](#)
[Competencies](#)
[Current Learning](#)
[Learning](#)
[Education Status](#)
[Not](#)
[Assessment](#)

Actions
[View Curricula History](#)
[View Progress for All Paths](#)
[Delete](#)
[Change Completion Status](#)

ACTIONS ASSOCIATED WITH CURRICULA:

Clicking the Actions link in the Actions column will list a number of actions available depending on the status of the certification. The actions are outlined below:

- **View Curricula History** – Shows all of the events, in chronological order, which took place during the acquisition of the curriculum.
- **View Progress for All Paths** – Shows a completion percentage bar indicating how far along the learner is in the curriculum.
- **Begin Registration** – Allows the administrator to register the learner for courses associated with the curriculum.
- **Delete** – Allows the curriculum requirements to be deleted from learner.
- **Change Completion Status** – Allows the expiration date to be changed or the certification to be revoked.



GRANT CURRICULUM

People Administrators may grant a curriculum for a learner, which means you mark the curriculum as complete, even though the learner has not completed all elements of the curriculum through the LMS. You may wish to do this if the learner has documented completion of equivalent learning outside the LMS. Your IC should have a business process in place for verifying actual course completion. Before you can grant completion of a curriculum, it must exist in the LMS. LMS Training Administrators have the ability to create curricula.

1. Select the **Admin** Icon.



2. Click the **Learning** link.
3. Select **Curricula** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

7. Click **View Curricula** to the right of the correct learner.

HHS Learning Portal
The Joy of Learning Enabled Through Access!

People | HR

Curricula

Manage Certifications & Curricula for people.

Advanced Search

Person Names: NIH Learner

Search

Curricula

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Curricula

8. You will now see all of the curricula associated with the learner.

9. Click **Grant Curriculum**.

Curricula for NIH Learner

A certification or curriculum is a set of learning items configured in a selected path that must be completed in order to become "Acquired." Both track your progress as the items are completed.

☒ Show Required Curricula Only

[Configure](#) | [Save Search Query](#)

View Active

Profile Quicklinks
[Certifications](#)
[Curricula](#)
[Competencies](#)
[Current Learning](#)
[Completed Learning](#)
[Continuing Education Status](#)
[Profile Snapshot](#)
[Multirater Assessment](#)
[Plans](#)

Curricula
→ [Grant Curricula](#) | [Add Curricula](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 4 out of 4 results

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
LMS Training	<input checked="" type="radio"/> Path 1 - 0% Completed	Assigned	NIH Learner		Actions
NIAID Art of Leadership Cohort 21	Art of Leadership	Discontinued	Ann WITHINGTON		Actions

10. Enter the name of the curriculum into the **Name** field then click **Search**.

11. Select the radio button to the left of the curriculum you would like to grant and click **Next**.

Grant Curricula

1.Select Curricula
 →
2.Grant Curricula

LMS

[Configure](#) | [Save Search Query](#)

Curricula
[Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Select	Name	Version	Description
<input checked="" type="radio"/>	LMS Training		Training Administrator


NOTE: If you are granting a curriculum that has already been assigned to the learner, you will be asked to confirm that you want to continue with the Grant Curriculum process.

12. Enter the date on which the learner acquired the curriculum (finished it), then click **Finish**.

Grant Curriculum

1.Select Curriculum >>>

Granted Curricula [Print](#) | [Export](#)

Learner Name	Acquired On
NIH Learner	<input type="text" value="04/20/2012"/> 

Finish Back Close

13. Click **Finish**.

ASSIGN CURRICULUM

A curriculum must first be created in the LMS by an LMS Training Administrator before it will be available for you to assign to a learner.

1. Select the **Admin** Icon.



2. Click the **Learning** link.
3. Select **Curricula** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Curricula** to the right of the correct learner.

HHS Learning Portal
The Joy of Learning Enabled Through Access!

NIH PeopleAdmin

People HR

- People
- Proxy Access
- Distribution Lists
- Plan Types
- Plan Forms
- Plans
- Learning
- Current Learning
- Completed Learning
- Certifications
- Curricula**
- Continuing Education
- Courses
- Subscription Order History
- Subscription Usage

Curricula

Manage Certifications & Curricula for people.

Advanced Search

Person Names: NIH Learner

[Search](#)

Curricula
Showing 1 out of 1 results

[Print](#) | [Export](#) | [Modify Table](#)

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Curricula

6. You will now see all of the curricula associated with the learner.

7. Click **Add Curriculum**.

Curricula for NIH Learner

A certification or curriculum is a set of learning items configured in a selected path that must be completed in order to become "Acquired." Both track your progress as the items are completed.

Name: Show Required Curricula Only: ☒

[Configure](#) | [Save Search Query](#) [Search](#)

Curricula
Showing 4 out of 4 results

[Grant Curricula](#) | [Add Curricula](#) | [Print](#) | [Export](#) | [Modify Table](#)

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Is Compliant	Actions
LMS Training	<div><div></div></div> Path 1 - 0% Completed	Acquired	NIH Learner			Actions
NIAID Art of Leadership Cohort 21	Art of Leadership	Discontinued	Ann WORTHINGTON			Actions

View: [Active](#)

Profile Quicklinks

- [Certifications](#)
- [Curricula](#)
- [Competencies](#)
- [Current Learning](#)
- [Completed Learning](#)
- [Continuing Education Status](#)
- [Profile Snapshot](#)
- [Multirater Assessment](#)
- [Plans](#)

8. Enter the name of a curriculum in the **Name** field then click **Search**.

Select Curricula

Name

LMS

Discontinued From >=

Updated On >=

Target Completion Duration <=

Configure | Save Search Query

→

Search

Curricula

Print | Export | Modify Table

Showing 1 out of 1 results

<input type="checkbox"/>	Name	Available From	Discontinued From	Target Completion Duration
<input checked="" type="checkbox"/>	LMS Training	10/01/2009		0 Days

↑

→

Select and Close

Close

9. Select the checkbox in front of the curriculum you would like to add, then click on select and close.

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CONTINUING EDUCATION

If an LMS Training Administrator has created continuing education Fields of Study and/or Continuing Education Plans in the LMS, a People Administrator may add the requirements to learners and/or check their progress against requirements. NIH is not yet making frequent use of the Continuing Education credit functionality.

VIEW STATUS OF CONTINUING EDUCATION REQUIREMENTS

1. Select the **Admin** Icon.



2. Click the **Learning** link.
3. Select **Continuing Education** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**. **NOTE:** See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.
5. Click **View Status** next to the appropriate learner name.

Continuing Education

Manage continuing education for people.

Person Names: NIH Learner

Search

Continuing Education

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Status

NOTE: If the learner has been assigned any continuing education credit requirements, they will be listed on the Continuing Education Requirement screen with a status indicator.

Continuing Education Requirement: NIH Learner

A Continuing Education (CE) Plan is a way of tracking the training credits earned within a given time period. The CE Plan is complete once you earn the credits equal to or greater than the credits defined in the plan.

Start Date >= End Date <=

Group By

☐ Field of Study

☐ Courses

☒ Continuing Education Requirements

Continuing Education Requirements

[Add Requirement](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 2 out of 2 results

Name	Status	Completion Status	Start Date	End Date	Grace Period (Days)	Actions
NIH Supervisory Refresher Training (2011-2013)	Active	Complete	01/01/2011	12/31/2013	35	View Details Delete

[View](#)

Profile Quicklinks

[Certifications](#)

[Curricula](#)

[Competencies](#)

[Current Learning](#)

[Completed Learning](#)

[Continuing Education Status](#)

[Profile Snapshot](#)

[Multirater Assessment](#)

[Plans](#)

6. Click **View Details** to see more information about the requirement.

NIH Supervisory Refresher Training (2011-2013)

[Lock the Plan](#) [Printer Friendly View](#)

Name NIH Supervisory Refresher Training (2011-2013)

Person Name NIH Learner

Start Date 01/01/2011

End Date 12/31/2013

Grace Period (days) 35 days

Plan Completion Only the selected fields of study count towards plan completion. The plan is completed by achieving target credits for each field of study.

Completion Status Complete

Sources

Showing 1 out of 1 results

Name	Type
Thomas HOLSCHER	Person

Plan Total by Field of Study

[Print](#) | [Export](#) | [Modify Table](#)

Field of Study	Description	Target Credits	Credits from Plan Period	Credits from Grace Period	Total Counted	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	16	50	0	50	Actions

Plan Total = 50

[Back](#)

ADD A CONTINUING EDUCATION REQUIREMENT FOR A LEARNER

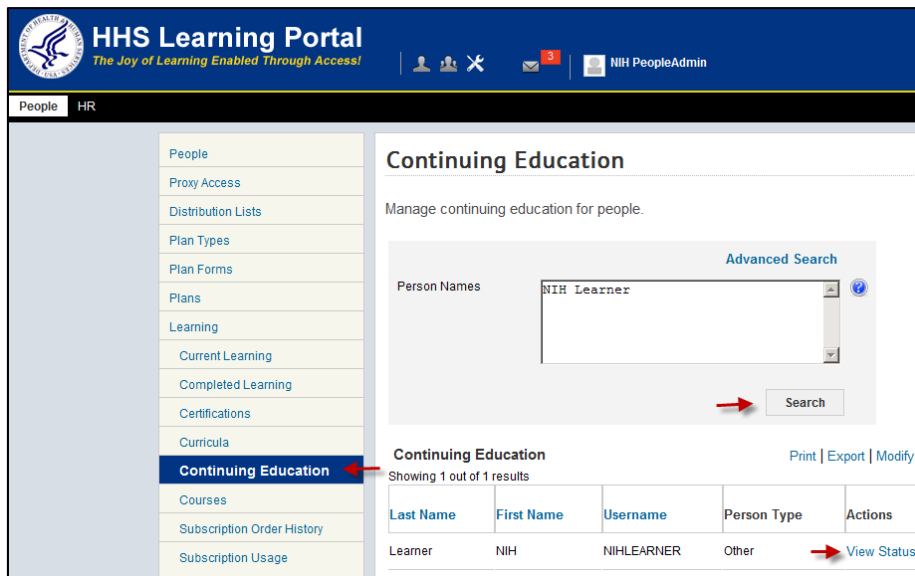
1. Select the **Admin** Icon.



2. Click the **Learning** link.
3. Select **Continuing Education** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Status** next to the appropriate learner name.



NOTE: If the learner has been assigned any continuing education credit requirements, they will be listed on the Continuing Education Requirement screen with a status indicator.

6. Click the **Add Requirement** link.

Continuing Education Requirement: NIH Learner

A Continuing Education (CE) Plan is a way of tracking the training credits earned within a given time period. The CE Plan is complete once you earn the credits equal to or greater than the credits defined in the plan.

Start Date >=

End Date <=

Search

Group By

☐ Field of Study
 ☐ Courses
 ☒ Continuing Education Requirements

Continuing Education Requirements

[Add Requirement](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 2 out of 2 results

Name	Status	Completion Status	Start Date	End Date	Grace Period (Days)	Actions
NIH Supervisory Refresher Training (2011-2013)	Active	Complete	01/01/2011	12/31/2013	35	View Details Delete
NIH Supervisory Refresher Training (2013-2015)	Active	Complete	01/01/2013	12/31/2015	35	View Details Delete

Profile Quicklinks

- [Certifications](#)
- [Curricula](#)
- [Competencies](#)
- [Current Learning](#)
- [Completed Learning](#)
- [Continuing Education Status](#)
- [Profile Snapshot](#)
- [Multirater Assessment](#)
- [Plans](#)

7. Enter search parameters in the fields and click **Search**.

8. Click the **checkbox** to the left of the appropriate Continuing Education Requirement.

Page | 101

Select Continuing Education Requirements

Name

Description

Start Date =

End Date =

Domain

[Configure](#) | [Save Search Query](#)



Select Continuing Education Requirements

[Print](#) | [Export](#) | [Modify Table](#)

Showing 3 out of 3 results

<input type="checkbox"/>	Name	Description	Status	Start Date	End Date
<input checked="" type="checkbox"/>	NIH Supervisory Refresher Training (2011-2013)	This Continuing Education Plan is to track refresher training required of NIH supervisors. (16 CLPs every 3 years) If a person began working on this requirement in 2011, use this Continuing Education Plan to track 16 CLPs by December 31, 2013.	Ended	01/01/2011	12/31/2013
<input type="checkbox"/>	NIH Supervisory Refresher Training (2012-2014)	This Continuing Education Plan is to track refresher training required of NIH supervisors. (16 CLPs every 3 years) If a person began working on this requirement in 2012, use this Continuing Education Plan to track 16 CLPs by December 31, 2014.	Ended	01/01/2012	12/31/2014
<input type="checkbox"/>	NIH Supervisory Refresher Training (2013-2015)	This Continuing Education Plan is to track refresher training required of NIH supervisors. (16 CLPs every 3 years) If a person began working on this requirement in 2013, use this Continuing Education Plan to track 16 CLPs by December 31, 2015.	Active	01/01/2013	12/31/2015



9. Click **Select** to add the Continuing Education Requirement.

LEARNING PLANS

People Administrators may view and manage the courses on individuals' learning plans. Learning Plan functionality is very limited under the **Learning** tab. If you need to take actions on a learner's learning plan, please access it through the **Success Plans** tab, which is covered in "View/Add to Learning Plans: Method Two)" below.

VIEW/ADD TO LEARNING PLANS: METHOD ONE

1. Select the **Admin** Icon.



2. Click the **Learning** link.
3. Select **Courses** from the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Courses** next to the appropriate learner name.

HHS Learning Portal
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People | HR

People
Proxy Access
Distribution Lists
Plan Types
Plan Forms
Plans
Learning
Current Learning
Completed Learning
Certifications
Curricula
Continuing Education
Courses
Subscription Order History
Subscription Usage

Courses on Learning Plan

Manage courses for people.

Advanced Search

Person Names: NIH Learner

Search

Courses on Learning Plan

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Courses

Print | Export | Modify Table

NOTE: You will see a list of the courses on the person's learning plan. (You will not see items on the learning plan that are not courses.) You may click the **Title** of a course to see more details about it.

6. Click **Add Course**.

NOTE: Under **Related Links**, you may **View Progress**, **Launch** to view the learner's progress in the course, **Mark Complete** if necessary, or **Register** the learner for a course.

Courses : NIH Learner

Current **Completed**


Profile Quicklinks
[Certifications](#)
[Curricula](#)
[Competencies](#)
[Current Learning](#)
[Completed Learning](#)
[Continuing Education S](#)
[Profile Snapshot](#)
[Multirater Assessment Plans](#)

Courses [Add Course](#) | [Print](#) | [Export](#) | [Modify Table](#)


Title	Assigned By	Target Date	Status	Related Links	Mandatory <input type="checkbox"/>	Actions
NIH 2-Way Match Invoice Processing	NIH Manager	01/07/2015	New	Register Add to Plan	<input type="checkbox"/>	X
NIH NIAID OMER ELD Working with Contractors at NIAID	Ann WITHINGTON	06/01/2012	New	Register Add to Plan	<input type="checkbox"/>	X

7. Click the **Course Pick Button**.

Add Course

Course* 

Notes

Due Date 

Character Limit: 64000


Save **Cancel**


8. Enter the search criteria for the course and click **Search**.

9. Click the **Checkbox** for the course to be added.

Select Course

Title Course ID


Domain 

[Configure](#) | [Save Search Query](#) 

Courses

[Print](#) | [Export](#) | [Modify Table](#)

Showing 3 out of 3 results


Select	Version	Course ID	Title
<input type="checkbox"/>	FY15	NIHTC1001	NIH LMS Local Learning Registrar
<input checked="" type="checkbox"/> 	FY15	NIHTC1002	NIH LMS People Administrator
<input type="checkbox"/>	FY15	NIHTC1003	NIH LMS Learning Administrator

10. Enter any applicable **notes**.


11. Enter a **due date** for the course to be completed by the learner.

Add Course

* = required

Course* 

Notes

Due Date* 

12. Click **Save**.

Courses : NIH Learner

Current

Completed

Courses

[Add Course](#) | [Print](#) | [Export](#) | [Modify Table](#)

Title	Assigned By	Target Date	Status	Related Links	Mandatory <input type="checkbox"/>	Actions
NIH 2-Way Match Invoice Processing	NIH Manager	01/07/2015	New	Register Add to Plan	<input type="checkbox"/>	✖
NIH NIAID OWER ELD Working with Contractors at NIAID	Ann WITHINGTON	06/01/2012	New	Register Add to Plan	<input type="checkbox"/>	✖
NIH LMS Local Learning Registrar	NIH PeopleAdmin	01/29/2015	New	Edit Register Add to Plan	<input type="checkbox"/>	✖
Learning With Saba	NIH Manager	07/22/2010	In Progress	View Progress Mark Complete Add to Plan	<input type="checkbox"/>	✖

Profile Quicklinks

- [Certifications](#)
- [Curricula](#)
- [Competencies](#)
- [Current Learning](#)
- [Completed Learning](#)
- [Continuing Education St](#)
- [Profile Snapshot](#)
- [Multitrater Assessment Plans](#)

13. The course will now be displayed with the status **New**.

VIEW/ADD TO LEARNING PLANS: METHOD TWO

1. Select the **Admin** Icon.



2. Select **Plans** from the left navigation menu.

3. Click the **Assignee** pick button.

People HR

People
Proxy Access
Distribution Lists
Plan Types
Plan Forms
Plans
Learning
Competencies
Prescriptive Rules
Reports

Plans

Manage existing plans.

Plan Form Plan Type
 Start Date >= End Date <=
 Assignee Assignee's Organization
 Status Include All Suborganizations ☐
[Configure](#) | [Save Search Query](#) [Search](#)

4. Enter search criteria for the learner then click **Search**.
5. Select the **checkbox** to the left of the learner's first name.

Search Person, Internal

Supervisors: you can easily display all of your staff by entering your login ID into the "Manager" field, clicking the Magnifying Glass graphic, and then clicking the "Search" button.

Population* Internal
 Last Name Learner
 Username
 Organization
 Domain
 Security Roles -Select One-
 First Name NIH
 Person ID
 Manager
 Location
 Person Type -Select One-
 Include All Suborganizations ☐
[Search](#)

People [Print](#) | [Export](#)

Showing 2 out of 2 results

Select	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNAM8		NIHMANAGER
<input type="checkbox"/>	NIH	Learner1NIDDK	LEARNER1NIDDK	Federal	00419681	HNK		

[Close](#)

6. Click **Search**.
7. Click **Learning Plan** next to learner's name.

Plans

Manage existing plans.

Plan Form	<input type="text"/>	Plan Type	<input type="text"/>
Start Date >=	<input type="text"/>	End Date <=	<input type="text"/>
Assignee	NIH Learner	Assignee's Organization	<input type="text"/>
Status	-Select One-	Include All Suborganizations	<input type="checkbox"/>

[Configure](#) | [Save Search Query](#) [Search](#)

Plans

[Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Name	Assignee	Person Type	Plan Form	Plan Type	Status	Actions
Learning Plan	NIH Learner	Other	Learning Plan	Learning Plan	Activated	

8. From the learning plan **Activities/Critical Elements** tab, click the title of any item to access details about it. You can also see what **Type** of item it is, when it is due, and progress made (if applicable). Depending on the type of item, you will be able to take various actions using the pop-up links that appear when you hold your mouse over the **Actions** link to the right of each item.

9. Click **Add Element or Activity**.

10. Select a link from the **Add Element or Activity** popup bubble.

Plan Details: Learning Plan

[Printer Friendly View](#)

Activities/Critical Elements		Details/Instructions	Change Log
-------------------------------------	--	-----------------------------	-------------------

Plan Name	Learning Plan	Status	Activated
Assignee	NIH Learner	Approval Policy	No Approval

☒ View Current Activities ☐ View Closed Activities

Add Element or Activity

[Add Course](#)

[Add Certification](#)

[Add Curriculum](#)

[Add Goal](#)

Assigned Learning

[Add Element or Activity](#) | [Modify Table](#)

Name	Version	Type	Due Date	Completed On	Status	Source	Mandatory	Is Compliant	Actions
Learning With Saba	1.0	Course	07/22/2010		In Progress	NIH Manager	<input type="checkbox"/>		Actions
Test Goal		Goal	12/31/2010		<div style="width: 50px; height: 10px; background: linear-gradient(to right, red, gray);"></div>	NIH Manager			Actions

New: 0% Completed

11. Follow the prompts for the type of activity you chose to add the specific learning item you want to add to the learning plan. You will see a confirmation message that the item has been added to the plan.

Add Course

* = required


Course*

Notes
Character Limit: 64000

Due Date

12. Click **Close** to exit the message pop-up and return to the **Plan Details** screen. You should now see your item added to the activities list.

Add Activity To Plan

**Confirmation**

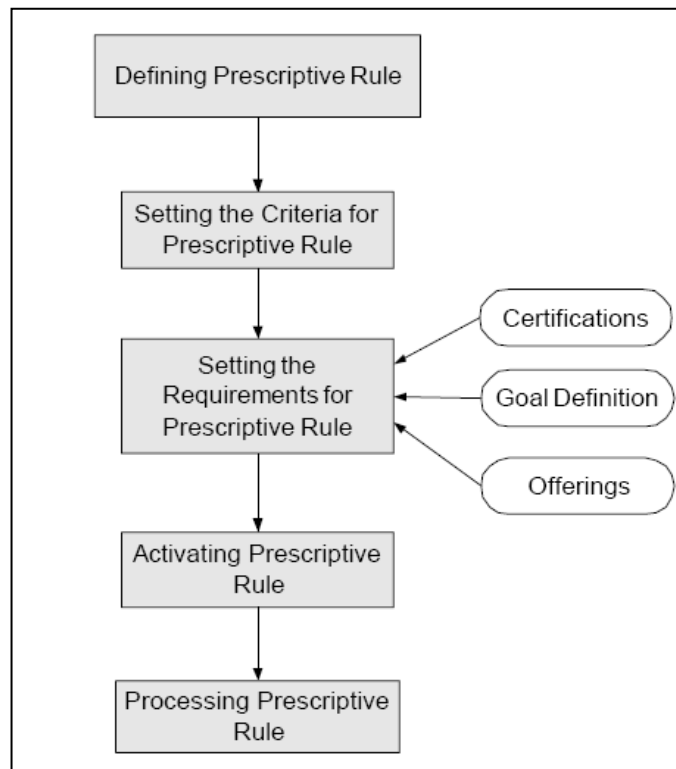
The selected activity has been assigned.

MANAGING PRESCRIPTIVE RULES

PRESCRIPTIVE RULES

Prescriptive rules are used to automatically assign learning items (offerings, certifications, curricula, competencies, goals, etc.) to people who fulfill specified criteria, such as location, organization code, audience type, job series, job role, competencies, and/or certifications. People qualify for a rule only if they fulfill the member criteria specified in the rule.

People Administrators can create prescriptive rules. The following diagram depicts the prescriptive rule creation process:



The following points are **VERY IMPORTANT!**

- Do **not** alter other organizations prescriptive rules – only process your own.
- Do **not** use the **Start Stop Processing** menu option.
- Do **not** process a prescriptive rule without conducting thorough testing. Think through the logic of the prescriptive rules very carefully. Before entering into the production portal, test the prescriptive rule in Staging. **ONCE A PRESCRIPTIVE RULE RUNS, YOU CANNOT REVERSE OR UNDO IT.**

You can view the **Error Log** and **Monitor** list to verify that learning items were properly assigned to the specified members.

CREATE A PRESCRIPTIVE RULE

1. Select the **Admin** Icon.



2. Click on the **Prescriptive Rules** link.
3. Click on the **New Prescriptive Rule** link.

The screenshot shows the 'Prescriptive Rules' page in the HHS Learning Portal. The page has a sidebar on the left with a menu containing 'People', 'Proxy Access', 'Distribution Lists', 'Plan Types', 'Plan Forms', 'Plans', 'Learning', 'Competencies', 'Prescriptive Rules' (highlighted with a red arrow), 'Reports', and 'Message Center'. The main content area is titled 'Prescriptive Rules' and includes a sub-header 'Manage prescriptive rules.' Below this is a navigation bar with four tabs: 'Prescriptive Rules' (active), 'Error Log', 'Monitor', and 'Process Triggered Rules'. The 'Prescriptive Rules' tab contains a form with fields for 'Name', 'Status' (a dropdown menu), 'Domain', and 'Ownership' (a dropdown menu). There are also links for 'Configure' and 'Save Search Query', and a 'Search' button. Below the form, there is a section titled 'Prescriptive Rules' with a red arrow pointing to a 'New Prescriptive Rule' link. At the bottom of the page, there is a message: 'Cancel processing the Prescriptive Rule. Cancellation occurs only after the requirement currently in process is completely processed.' and a 'Stop' button.

4. Add a name to the prescriptive rule in the **Name** field.
5. Add a description in the **Description** field.
6. Choose how members will be selected:
 - a. Select Members Manually – Select this option to identify all of the members that will be affected by the prescriptive rule. Use this option only if the members will not change.
 - b. Define selection criteria based on which members will be selected dynamically – Use this option for the prescriptive rule to update the affected members that may change based on certain criteria.

NOTE: If you have only a few people to add to the prescriptive rule, you may want to choose **Select members manually**. That option will allow you to specifically name each person.) This selection cannot be changed once the prescriptive rule is saved.

7. Select NIH for the **Domain** field (location of all the people accounts).

Set up a processing schedule. Read the options carefully and make sure you know the implications of every selection. If you have any questions, please submit a help desk ticket at https://nihohrweb.nih.gov:1010/WITS_IntraHR/index.aspx

8. Click **Step 2: Member Selection.**

New Prescriptive Rule

1.Rule Details >>> 2.Member Selection >>> 3.Requirements >>> 4.Preview >>> 5.Activate
[Switch to Standard Mode](#)

Note: The scheduling of the prescriptive rule is based on the time zone of the application server
Application server time zone : Eastern Daylight Time

* = required

Name* → New LMS Admins

Description Prescriptive Rule for adding LMS course to learners.

Member Selection* → ☐ Select members manually
→ ☒ Define selection criteria based on which members will be selected dynamically

Domain* → NIH

Processing Schedule → Process this rule
→ ☐ Once ☒ Recurring
→ ☐ Daily
recurs every [] days
→ ☒ Weekly
recurs every 2 weeks on
→ ☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

→ **Start Date*** 02/02/2015

→ **End Date**

→ **Start Time*** 11 : 59 a.m. p.m.

Created By nihpeopleadmin

This rule must run with ☒ Creator's privileges ☐ Administrator's privileges

Cancel Save & Finish Later Step 2: Member Selection >> ←

NOTE: The following screens show what is seen if members are selected dynamically.

9. Select the member search criteria you plan to use for your prescriptive rule by clicking the appropriate radio buttons.

IMPORTANT! Be careful. This screen is for selecting the criteria you will use to choose people to which the prescriptive rule will be applied. This is NOT for indicating what you will actually assign to people – that step comes later.

Prescriptive Rule Details: New LMS Admin 2

1.Rule Details >>> 2.Member Selection >>> 3.Requirements >>> 4.Preview >>> 5.Activate

Select Attributes ←

Show Filter Logic

Member Information

Population

☒ Both
☐ Internal ←
☐ External

Cancel Back Save And Preview Members Save Step 3: Set Requirements >>

10. Click **Select Attributes** button.

11. Enter the details for the criteria that you selected on the previous screen.

NOTE: If you chose the wrong criteria, select **Show All Available Criteria** to change your selection. Also, your screen may vary depending on the criteria selected on previous screens.

Add Attributes

Select the member search criteria for this rule. You will define values on the next screen.

Member Information

- ☒ Person Type
- ☒ Status
- ☒ Start Date After
- ☐ Start Date Before
- ☐ Country
- ☐ Other Information
- ☐ Manager
- ☐ Exception List
- ☐ Domain
- ☐ Audience Type
- ☐ Location

Job and Role Information

- ☐ Job
- ☐ Job Level
- ☐ Role

Organization Information

- ☒ Organization

Skill Information

- ☐ Certification
- ☐ Curriculum
- ☐ Competency

12. Regardless of the criteria you choose, click **Save and Preview Members**. This will display a list of members that fit the member criteria you entered.

IMPORTANT! DO NOT SKIP THIS STEP. Always preview the members to whom the assignment will be made before you finish and run the prescriptive rule. It is easy to make a mistake that will impact a large number of people in an enterprise system.

13. Click on the **Step 3: Set Requirements** button in the lower right corner when you are SURE your member criteria are set correctly.

Prescriptive Rule Details: New LMS Admin 2

1.Rule Details
2.Member Selection
3.Requirements
4.Preview
5.Activate

Select Attributes

Show Filter Logic

Member Information

Population

☒ Both
☐ Internal
☐ External
☒ AND
☐ OR

Status

-Select One-

Start Date After

☒ AND
☐ OR

Person Type

Add Person Type

No items found

☒ AND
☐ OR

Organization

Add Organizations

No items found

☐ Include Sub-Organizations

Cancel

Back

Save And Preview Members

Save

Step 3: Set Requirements >>

On the **Requirements** screen, enter the learning items that will be assigned to each of the members that were selected in the previous step. Select the **Add** link for the type of item you want to assign and follow the prompts.

14. Click **Step 4: Preview** at the bottom of the page.

Prescriptive Rule Details: New LMS Admin 2

1.Rule Details ... 2.Member Selection ... 3.Requirements ... 4.Preview ... 5.Active

Certifications[Add Certification](#)

No items found

Curricula[Add Curriculum](#)

No items found

Competencies[Add Competency](#)

No items found

Courses[Add Course](#)

No items found

Offerings[Add Offering](#)

No items found

☐ Check for existing registrations and previous completions.

☐ Apply drop charges when deleted

Plan Forms[Add Plan Form](#)

No items found

Continuing Education Requirements[Add Requirement](#)

No items found

Cancel

Save

Step 4: Preview >>

15. Review all of the details, and when you are certain everything is correct, click **Step 5: Activate** at the bottom of the page. Choosing this activate button will make the prescriptive rule run according to the settings you entered.

Prescriptive Rule Details: New LMS Admin 2

1.Rule Details >>> 2.Member Selection >>> 3.Requirements >>> 4.Preview >>> 5.Activate

Details

Name: New LMS Admin 2

Description:

Member Selection: Define selection criteria based on which members will be selected dynamically

Domain: NIH

Start Date: 02/02/2015

Start Time: 11 : 59 p.m.

End Date:

Processing Schedule: Weekly

Refresh Rate: 2

Created By: nihpeopleadmin

This rule must run with:
☒ Creator's privileges
☐ Administrator's privileges

Member Selection

Person Type: Both

[Preview Members](#) ←

Requirements

Courses: NIH LMS Local Learning Registrar

←

16. Once the screen indicates that the prescriptive rule “is activated successfully,” then you may either start again by clicking **New Prescriptive Rule**, or click **Finish**.

Prescriptive Rule Details: New LMS Admin 2

1.Rule Details >>> 2.Member Selection >>> 3.Requirements >>> 4.Preview >>> 5.Activate

New LMS Admin 2 is activated successfully

↓

VIEW/EDIT A PRESCRIPTIVE RULE

1. Select the **Admin** icon.



2. Click on the **Prescriptive Rules** link.
3. Enter the search criteria and click **Search**.
4. Select the prescriptive rule **Name** that you want to view and edit.

Prescriptive Rules

Manage prescriptive rules.

Prescriptive Rules | Error Log | Monitor | Process Triggered Rules

Name: Status:
Domain: Ownership:
[Configure](#) | [Save Search Query](#) [Search](#)

Prescriptive Rules [New Prescriptive Rule](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 2 out of 2 results

Name	Status	Last Processed On	Process	Actions
New LMS Admin 2	Active		Process	Actions
New LMS Admins	Draft		Process	Actions

Cancel processing the Prescriptive Rule. Cancellation occurs only after the requirement currently in process is completely processed. [Stop](#)

NOTE: Clicking on the **Actions** link will allow you to delete the rule.

Prescriptive Rules [New Prescriptive Rule](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 2 out of 2 results

Name	Status	Last Processed On	Process	Actions
New LMS Admin 2	Active		Process	Actions
New LMS Admins	Draft		Process	Actions

Cancel processing the Prescriptive Rule. Cancellation occurs only after the requirement currently in process is completely processed. [Stop](#)

5. Edit the information as on the **Prescriptive Rule Details** screen, **Main** tab as appropriate. The **Main** tab provides the **Name**, **Description**, and **Domain** fields, as well as the information required for the **Processing Schedule**.

Prescriptive Rule Details: New LMS Admin 2

Main	Member Selection	Requirements	Error Log	Processing History
------	------------------	--------------	-----------	--------------------

Note: The scheduling of the prescriptive rule is based on the time zone of the application server
Application server time zone :Eastern Daylight Time



Name*

Description

Member Selection
☐ Select members manually
☐ Define selection criteria based on which members will be selected dynamically

Domain*

Processing Schedule
Process this rule
☐ Once ☒ Recurring
☐ Daily
recurs every days
☒ Weekly
recurs every weeks on
☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat
Start Date*
End Date
Start Time* : ☐ a.m. ☒ p.m.
Status*
Created By nihpeopleadmin
This rule must run with
☒ Creator's privileges
☐ Administrator's privileges

6. Click **Save & Finish Later** or **Save & Add More Information** at the bottom of the page when you are done.
7. Click on the **Member Selection** tab and then click on the **Show Filter Logic** link you will be able to see the member criteria. Edit the member criteria as necessary.

Prescriptive Rule Details: New LMS Admin 2

Main **Member Selection** Requirements Error Log Processing History

Personal Criteria Profile Criteria


[Hide Filter Logic](#) [Show Selected Criteria Only](#)


Filter Logic

Member Information

Population ☒ Both
☐ Internal
☐ External
☒ AND
☐ OR

Status

Start Date Before 

Start Date After 

☒ AND
☐ OR

Country

☒ AND
☐ OR

Person Type

[Add Person Type](#)

No items found

☒ AND
☐ OR

Manager

[Add Manager](#)

No items found

Exception List

[Add Person](#)

No items found

☒ AND
☐ OR

Domain

[Add Domain](#)

No items found

☐ Include Sub-Domains

☒ AND
☐ OR

Audience Type / Audience Sub Type

[Add Audience Type](#)

No items found

☒ AND
☐ OR

Location

[Add Location](#)

No items found

☒ AND
☐ OR

Organization

[Add Organizations](#)

No items found

☐ Include Sub-Organizations

☒ AND
☐ OR

Internal Custom Fields

Preferred name

HSPD-12 ID

HHS ID*

Sub-OPDIV

OPDIV ID

Supervisory Code

Pay Plan



Save And Preview Members

Save


Cancel



8. Click **Save And Preview Members** at the bottom of the page when you are finished.

IMPORTANT! ALWAYS preview members when you make any change to the member criteria. Make sure only the people you want included in the prescriptive rule are included.

9. Select the **Requirements** tab next and make any changes needed.

Main	Member Selection	Requirements	Error Log	Processing History		
Certifications Add Certification						
No items found						
Curricula Add Curriculum						
No items found						
Competencies Add Competency						
No items found						
Courses Add Course						
Name	Version	ID	Target Days	Due Date	Mandatory	Actions
NIH LMS Local Learning Registrar	FY15	NIHTC1001	0	No Due Date	<input type="checkbox"/>	Edit Due Date Delete
Offerings Add Offering						
No items found						
<input type="checkbox"/> Check for existing registrations and previous completions.						
<input type="checkbox"/> Apply drop charges when deleted						
Plan Forms Add Plan Form						
No items found						
Continuing Education Requirements Add Requirement						
No items found						
						
					<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

10. Click **Save** at the bottom of the page.

11. The **Error Log** tab shows any errors that were encountered during the processing of the prescriptive rule.

Prescriptive Rule Details: New LMS Admin 2

Main	Member Selection	Requirements	Error Log	Processing History
------	------------------	--------------	-----------	--------------------

Errors

No items found

Delete All

Re-Process Rule

Cancel

12. The **Processing History** tab shows how many records were updated each time the prescriptive rule was processed. (If the rule has not been processed yet, nothing will be listed.) It will also show the processing status.

Prescriptive Rule Details: New LMS Admin 2

Main	Member Selection	Requirements	Error Log	Processing History	
------	------------------	--------------	-----------	--------------------	--

Processing History

No items found

Delete All

Cancel

PROCESS A PRESCRIPTIVE RULE

When you are sure the member criteria and requirements are correct, you may want to manually process a prescriptive rule, especially if you did not set it up to run automatically for you.

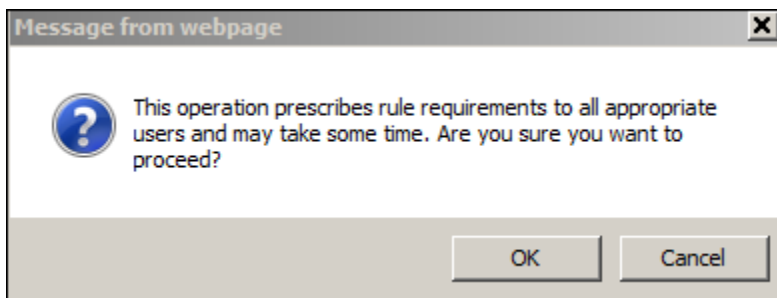
1. Select the **Admin** icon.



2. Click on the **Prescriptive Rules** link.
3. Enter the search criteria and click **Search**.
4. Select the prescriptive rule **Name** that you want to view and edit.
5. Select **Process** next to the prescriptive rule.

The screenshot shows the 'Prescriptive Rules' section of the HHS Learning Portal. On the left is a navigation menu with links like 'People', 'Proxy Access', 'Distribution Lists', 'Plan Types', 'Plan Forms', 'Plans', 'Learning', 'Competencies', 'Prescriptive Rules' (highlighted with a red arrow), 'Reports', and 'Message Center'. The main content area is titled 'Prescriptive Rules' and includes a sub-header 'Manage prescriptive rules.' Below this are tabs for 'Prescriptive Rules' (active), 'Error Log', 'Monitor', and 'Process Triggered Rules'. There are input fields for 'Name' (containing 'New LMS Admin'), 'Status' (a dropdown menu), 'Domain', and 'Ownership' (a dropdown menu). Below these fields are links for 'Configure', 'Save Search Query', and a 'Search' button (indicated by a red arrow). A table titled 'Prescriptive Rules' shows two results. The first row is 'New LMS Admin 2' with status 'Active' and a 'Process' link (indicated by a red arrow). The second row is 'New LMS Admins' with status 'Draft' and a 'Process' link. At the bottom, there is a warning message: 'Cancel processing the Prescriptive Rule. Cancellation occurs only after the requirement currently in process is completely processed.' and a 'Stop' button.

6. You will receive an alert. Click on **Ok**



6. After processing the prescriptive rule, the **Last Processed On** column will update.

Prescriptive Rules

Manage prescriptive rules.

Prescriptive Rules

Error Log

Monitor

Process Triggered Rules

Name

New LMS Admin 2

Status

-Select One-

Domain

Ownership

-Select One-

Configure | Save Search Query

Search

Prescriptive Rules

New Prescriptive Rule | Print | Export | Modify Table

Showing 1 out of 1 results

Name	Status	Last Processed On	Process	Actions
New LMS Admin 2	Active	02/02/2015 5:27 PM	Process	Actions

Cancel processing the Prescriptive Rule. Cancellation occurs only after the requirement currently in process is completely processed.

Stop

UNDERSTANDING INTERNAL ORGANIZATIONS

As a People Administrator, you have access to the **Organizations** tab under your People Administrator – Orgs & Jobs role. From this tab, you may search for **Internal Organizations**, which are identified by Org/SAC Code in the LMS.

VIEW INTERNAL ORGANIZATIONS

1. Select the Admin Icon.



2. Click on the HR tab.
3. Enter the organization code into the Internal Organization field then click Search.

The screenshot shows the 'Internal Organizations' search interface. On the left is a sidebar with a menu containing 'Organizations', 'Internal Organizations' (highlighted), 'External Organizations', 'Job Families', 'Job Level', 'Roles', 'Jobs', 'Competencies', 'Locations', and 'Facilities'. The main area has a search form with fields for 'Organization Name' (containing 'HNAME'), 'Organization Number', and 'City'. Below the form are links for 'Configure', 'Save Search Query', and a 'Search' button. A table below shows 'Showing 1 out of 1 results' with one entry: 'HNAME' with organization number '00007229'. The table has columns for 'Organization Name', 'Organization Number', 'City', and 'Actions'. A red arrow points to the 'Search' button, and another red arrow points to the 'HNAME' link in the table.

You may click the Internal Organization name to see more details and perform the following tasks:

- **Profile** tab:

- **Create Community** through which people in your organization may share documents and other information through the LMS
- Add **Contact** information for your organization ONLY

IMPORTANT! Do not alter data in any of the required fields marked in red with an asterisk (*). These are populated automatically and referenced by several functions throughout the LMS.

- View the names of any **Local Learning Registrars** in your organization

IMPORTANT! You are not authorized to add Local Learning Registrar permission to anyone. Doing so would be grounds for removing your administrative access to the LMS.

Internal Organizations Details: HNAME

Profile
Members

Organization Name*

Mission Statement

Organization Number

Learning Contact

Secondary Contact Person

Parent Organization*

Address 1

HNAME

Ofc Strategic Mgmt Planning

Character Limit:2000

00007229

HNAME

- **Members** tab: view all learners in the LMS assigned to your Org/SAC code. This list can be exported to an Excel file in order to verify names and designated supervisors. This can be a good way to ensure the appropriate people are designated to your organization and identify any learner accounts that should not be designated to your organization. (Remember: Incorrect org/SAC codes must be corrected in the source HR system.) You will need to access individual user profiles to edit incorrect or missing supervisor names.
- Do not use the **Prescriptive Rules** tab for Internal Organizations.

Internal Organizations Details: HNAME		
Profile	Members	
Members Print Export Modify Table		
Showing 14 out of 14 results		
Name	Manager Name	Job
Charles FRITZ	Colleen BARROS	0301-MISCELLANEOUS ADMINISTRATION AND PROGRAM SERIES
Jonathan MATHIS	Charles FRITZ	0301-MISCELLANEOUS ADMINISTRATION AND PROGRAM SERIES
Kristeena SIGLER	Charles FRITZ	0343-MANAGEMENT AND PROGRAM ANALYSIS SERIES
MARTHA RANDAZZO	Charles FRITZ	0343-MANAGEMENT AND PROGRAM ANALYSIS SERIES

USING EXTERNAL ORGANIZATIONS TO ADD VENDORS

External Organizations are used to set up vendors that can be attached to the courses. New external organizations can be added, but search thoroughly first to avoid adding duplicates.

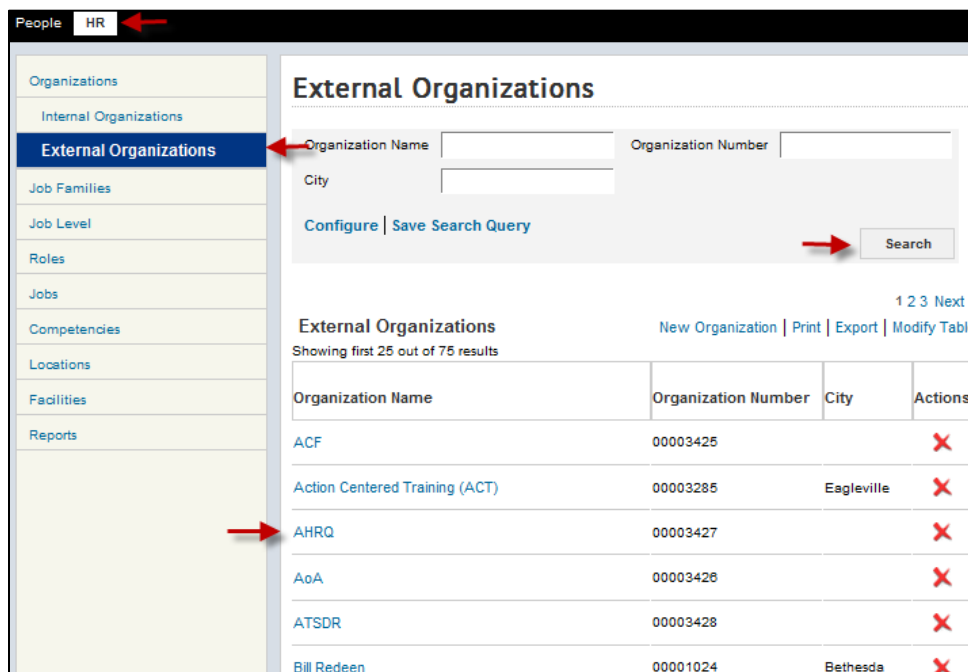
External organization vendors will eventually be added through an automated data feed that transfers vendors in the NIH Business System (NBS).

VIEW EXTERNAL ORGANIZATIONS

1. Select the Admin Icon.



2. Click on the HR tab.
3. Click on the External Organizations tab.
4. Search for the vendor you want to view.



People **HR**

Organizations

- Internal Organizations
- External Organizations**
- Job Families
- Job Level
- Roles
- Jobs
- Competencies
- Locations
- Facilities
- Reports

External Organizations

Organization Name Organization Number

City

[Configure](#) | [Save Search Query](#) [Search](#)

1 2 3 Next

[New Organization](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing first 25 out of 75 results

Organization Name	Organization Number	City	Actions
ACF	00003425		X
Action Centered Training (ACT)	00003285	Eagleville	X
AHRQ	00003427		X
AoA	00003426		X
ATSDR	00003428		X
Bill Redeen	00001024	Bethesda	X

5. Click the name of any **External Organization** name to see the same detail tabs as are available for Internal Organizations.

External Organizations Details: AHRQ

Profile

Members

Organization Name*

AHRQ

Mission Statement

Agency for Healthcare Research and
Quality

Character Limit:2000

Organization Number

00003427

Learning Contact

Parent Organization

Type of Business

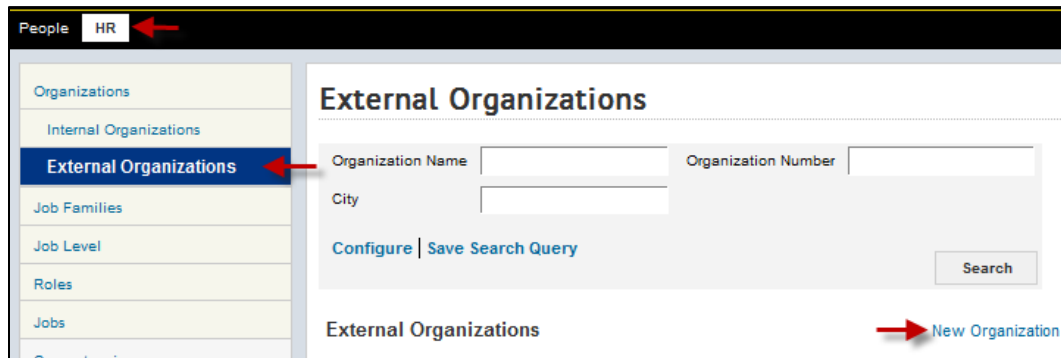
-Select One-

ADD AN EXTERNAL ORGANIZATION

1. Select the Admin Icon.



2. Click on the HR tab.
3. Click on the External Organizations tab.
4. Click the New Organization link.



5. You will see a **New External Organization** screen. Enter all data you have about the external organization, especially the required fields marked with a red asterisk (*).

Organizations

Internal Organizations

External Organizations

Job Families

Job Level

Roles

Jobs

Competencies

Locations

Facilities

Reports

New External Organizations

* = required

Organization Name*

Mission Statement

Character Limit:2000

Organization Number

Parent Organization

Type of Business

Address 1

Address 2

Address 3

City

State/Province

Country

ZIP/Postal Code

Primary Phone

Secondary Phone

Fax

E-mail

Web Server

Currency

Security Keyword

Is Active ☐

Domain*

Objectives Administrator

Billing Address

Billing Address 2

Billing City

Billing State/Province

Billing Country

Billing ZIP/Postal Code

Learning Vendor ☐

Learning Manufacturer ☐

Discount

Training Unit Agreements [Transfer](#) [Combine](#)

No items found

Save **Cancel**

- Click **Save** at the bottom of the screen when you are finished to save the external organization in the LMS.

GENERATING REPORTS

REPORTS

A People Administrator has access to a variety of reports in the LMS. Reports can be generated, exported, printed, emailed and subscribed to if desired. The reports available for you to run vary slightly between the roles of People Administrator – People and People Administrator – Orgs & Jobs. Below you will find instructions on how to work with reports in the LMS.

GENERATE A REPORT

1. Select the **Admin** Icon.



2. Click on the **Reports** link.
3. You can see all reports available by clicking **Search**.

The screenshot shows the HHS Learning Portal interface. On the left is a navigation menu with links like People, Proxy Access, Distribution Lists, Plan Types, Plan Forms, Plans, Learning, Competencies, Prescriptive Rules, Reports, Subscriptions, and Message Center. The 'Reports' link is highlighted with a red arrow. The main content area is titled 'Reports' and contains a search form with fields for Name, Category, and Report Template, along with a 'Search' button. Below the search form is a table of reports. The table has columns for Name, Report Template, Description, Engine Type, and Actions. Three reports are listed: 'ACL - Training Complete', 'Active Users by Organization', and 'All Orders by Offering Start Date'. Each report has an 'Actions' link next to it. A red arrow points to the 'Search' button in the search form.

4. To run a report click on **Actions** and then select **Execute**.

Reports

Reports contain data that you can use for analysis and decision-making. They can be printed or exported (hover over the Actions link for options).

[Configure](#) | [Save Search Query](#)

1 2 3 4 N

[Print](#) | [Export](#) | [Modify](#)

Name	Report Template	Description	Engine Type	Actions
ACL - Training Complete	Completed Courses Template for Administrators		Saba Ad hoc	Actions

Active Users by

Active Users by

This report enables an administrator to see the

Managed

Actions

[Email](#)
[Execute](#)
[Subscribe](#)

5. Enter criteria into appropriate fields.

IMPORTANT! All fields labeled in Red with an asterisk are required.

Report Parameters - Approval Analysis for Admin

Plan Form*

Organization

6. Click Generate Report.

EXPORT A REPORT

Once a report is generated, it can be exported from the LMS into other file formats. Of these, “Adobe Acrobat – PDF” and “Microsoft Excel 97-2000 – Data Only (XLS)” are the most commonly used.

1. Complete the steps in section **Generate a Report**.
2. Click the **export icon** in the upper left corner of the report.

Last Name	First Name	HHS ID	Org Name	Person Status	Manager (HHS ID)	Additional Approver on Orders (HHS ID)	Altern
ANTHONY	Pamela	2001172093	HSNAM42	Full Time	Darla HAYES (0010112615)	Tracy GREGG (2000368516)	Tr
Anthony	Pamela		HSNAM42	Terminated	()	Tracy GREGG (2000368516)	
CAMPBELL KING	Maureen	2001545295	HSNAM42	Full Time	()	Tracy GREGG (2000368516)	
EASTERDAY	Donna	0011488357	HSNAM42	Deactivated	Darla HAYES (0010112615)	Tracy GREGG (2000368516)	Pam
GORTHY	Shekhar	0011961411	HSNAM42	Full Time	Darla HAYES (0010112615)	Tracy GREGG (2000368516)	Pam
HAYES	Darla	0010112615	HSNAM42	Full Time	Kevin MURPHY (0010182712)	Tracy GREGG (2000368516)	Tr
Hayes	Darla		HSNAM42	Terminated	()	Tracy GREGG (2000368516)	
KACHIBHATLA	Srinivas	2001370387	HSNAM42	Full Time	()	Tracy GREGG (2000368516)	
KERR	Kenneth	0011581481	HSNAM42	Full Time	Darla HAYES (0010112615)	Tracy GREGG (2000368516)	Pam
MAYSON	TARA	0014282035	HSNAM42	Terminated	Darla HAYES (0010112615)	Tracy GREGG (2000368516)	Pam

3. Select the **File Format** you want, indicate the **Page Range**, and click **OK**. The following two formats are the most commonly used:

- The **Adobe Acrobat (PDF)** format will export a report ready for printing.
- The **Microsoft Excel 97-2000 – Data Only (XLS)** format will export a report ready to open in MS Excel so you can work with the data.

NOTE: The Page Range option during export is not available for all export formats.

http://reporting.hhs.gpehosting.com - Export R...

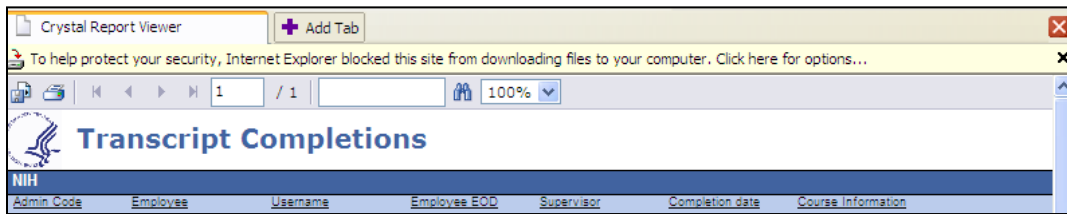
File Format: Microsoft Excel 97-2000 - Data Only (XLS)

Page Range: ☒ All ☐ Pages:

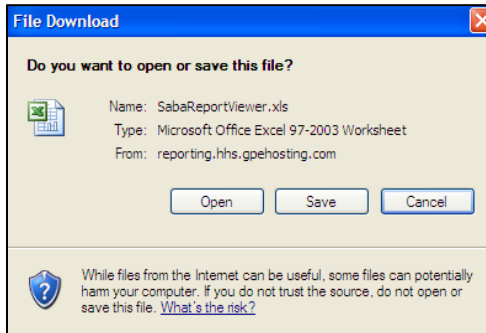
From: 1 To: 1

OK Cancel

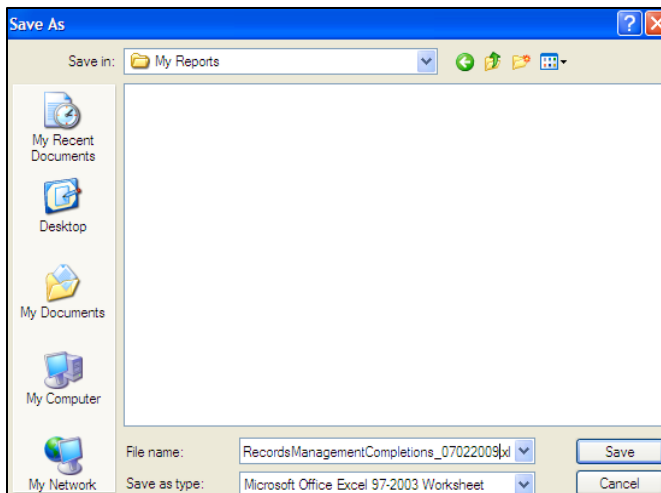
4. You may see the following browser warning. Click the **yellow warning bar** and select **Download File**. Repeat Step 2.



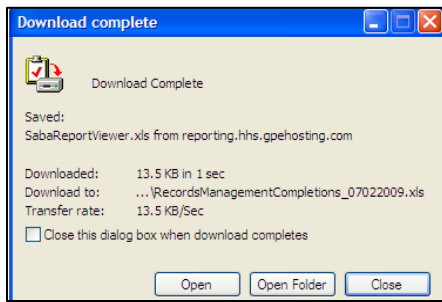
5. You will be prompted to open or save the file. Click **Save**.



6. Select a location in which to save the file and give it a meaningful name; click **Save**.




7. You will receive a prompt when the download is complete. Click **Open** to view the report file you just downloaded.

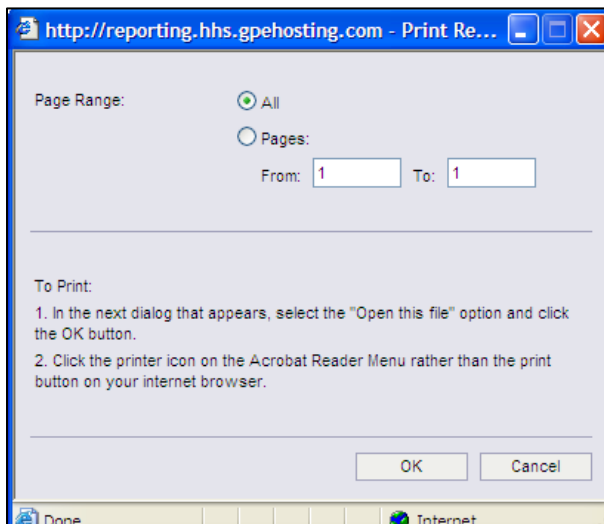


PRINT A REPORT

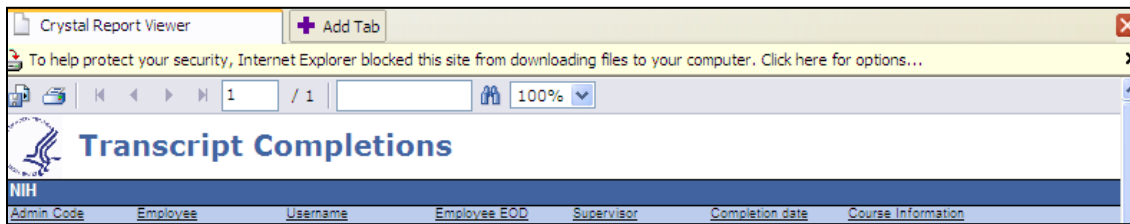
1. Complete the steps in section **Generate a Report**.
2. Click the **Print icon** in the upper left corner of the report.

 Transcript Completions						
Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information
HNA	Safiya Stewart Sagoua	00117808	04/13/2008		05/19/2009	Records Management for Everyone
HNA3842	Romica Brown	00113308	09/16/2007		05/19/2009	Records Management for Everyone
HNA3842	Vernon Cardwell	00100918	04/16/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3842	April Harrison	00101649	05/30/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3844	Charles Choi	00103021	07/09/2008	Brenda Bernard	06/24/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104284	09/03/2008	Daria Hayes	06/17/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104284	09/03/2008	Daria Hayes	06/23/2009	HHS Records Management for All Empl
HNAM426	Cathleen-Megan Moran	00088234	08/01/2004	Daria Hayes	06/17/2009	Records Management for Everyone

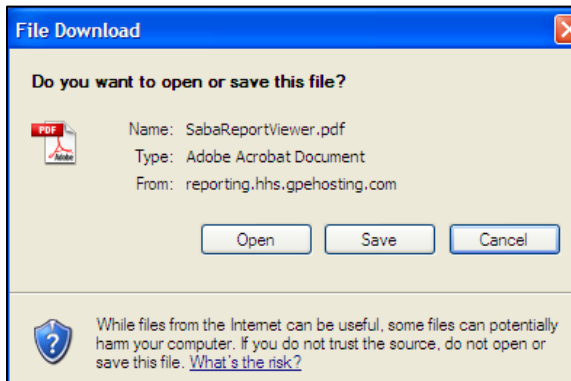
3. Indicate the **Page Range** you want, and click **OK**.



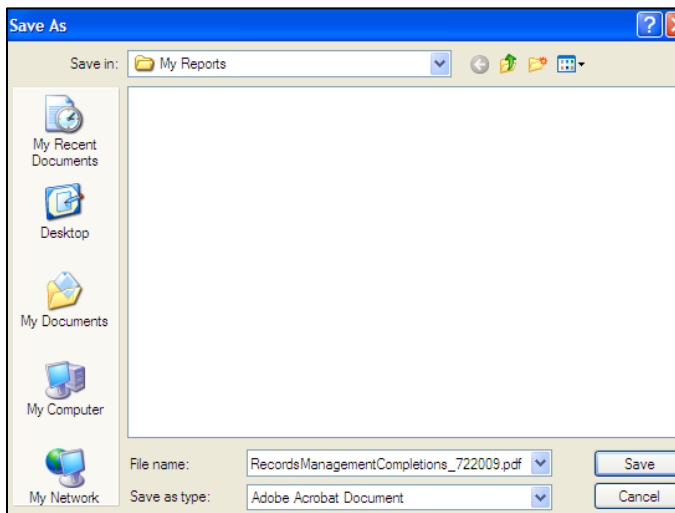
4. You may see the following browser warning. Click the **yellow warning bar** and select **Download File**. Repeat Step 2.



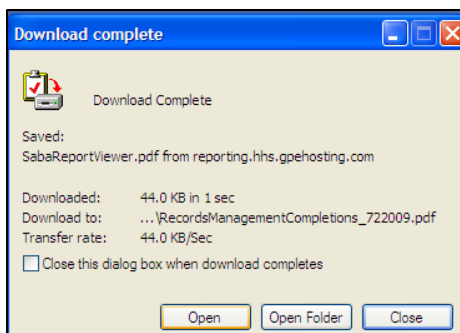
5. You will be prompted to open or save the file. Click **Save**.



6. Select a location in which to save the file and give it a meaningful name; click **Save**.



7. You will receive a prompt when the download is complete. Click **Open** to view the report file you just downloaded.



8. Click the **Adobe Reader print icon** to send the report to your printer.

EMAIL A REPORT

The LMS allows reports to be emailed, on-demand, to any valid email address. Those who receive the email do not need to log on or have access to the LMS in order to view the emailed report.

1. Select the **Admin** Icon.



2. Click on the **Reports** link.
3. Click **Search**.
4. Click **Actions** and then the **Email** link to the right of the report description of the report you want to send via email.

The screenshot shows the 'Reports' section of the LMS. At the top, there's a header 'Reports' followed by a descriptive paragraph. Below this is a search form with fields for 'Name', 'Category' (a dropdown menu), and 'Report Template'. There are links for 'Configure', 'Save Search Query', and a 'Search' button. Below the search form is a table of reports. The first report is 'ACL - Training Complete' with a description 'Completed Courses Template for Administrators' and an engine type 'Saba Ad hoc'. An 'Actions' link is visible next to the report. A tooltip menu is open over the 'Actions' link, showing options: 'Email' (highlighted with a red arrow), 'Execute', and 'Subscribe'. There are also pagination links '1 2 3 4 N' and action links 'Print | Export | Modify'.

5. Enter one or more recipient email addresses in the **To** field. (Separate multiple emails with either a comma or semi-colon)

Email ACL - Training Complete

Run Reports > Email ACL - Tr...

To Email Address(es) (Enter one or more email addresses separated by semi-colons (;). Example: jdoe@email.com; msmith@email.com)*

Character Limit:255
Remaining character count: 255

Subject* ACL - Training Complete

Mail Text*

Character Limit:255

Course - Course ID (Equals)

Preview Report Send Cancel

6. Modify the **Subject** and **Mail Text** (the email body) fields to appear as you want them in the email.
7. Choose a **Report Format** (if applicable) from the drop-down choices.
8. Click **Send** to email the report to recipients.

SUBSCRIBE TO A REPORT

Report subscriptions in the LMS allow reports to be emailed at scheduled intervals, to any valid email address. Those who receive the email do not need to log on or have access to the LMS in order to view the emailed report.

1. Select the **Admin** Icon.



2. Click on the **Reports** link.
3. Click **Search**.
4. Click **Actions** and then click the **Subscribe** link to the right of the report description of the report for which you want to create a subscription.

Reports

Reports contain data that you can use for analysis and decision-making. They can be printed or exported (hover over the Actions link for options).

Name Category

Report Template

[Configure](#) | [Save Search Query](#)

1 2 3 4 N

[Print](#) | [Export](#) | [Modify](#)

Name	Report Template	Description	Engine Type	Actions
ACL - Training Complete	Completed Courses Template for Administrators		Saba Ad hoc	Actions

Actions

- Email
- Execute
- Subscribe

5. Click the **New Report Subscription** link.

Report Subscription for ACL - Training Complete

[Run Reports](#) > [Report Subscri...](#)

Report Subscription [New Report Subscription](#)

No items found

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

7. Enter the **Course ID**.

Report Subscription for ACL - Training Complete

[Run Reports](#) > [Report Subscri...](#) > [Report Subscri...](#)

Report Subscription Name*

Description*

Course - Course ID (Equals)

To Email Address(es) (Enter one or more email addresses separated by semi-colons (;). Example: jdoe@email.com; msmith@email.com)*

Character Limit:255

Subject*

Mail Text*

Character Limit:255

Occurs ☒ Daily | Occurs Daily day(s) ☐ Weekly ☐ Monthly

Frequency ☒ Once | Frequency-Once : ☐ a.m. ☒ p.m.

☐ Every Hour(s) **Start Time*** **Start Date***

8. Enter one or more recipient email addresses in the **To Email** field.
9. Modify the **Subject** and **Mail Text** fields to appear as you want them in the email.
10. Choose a **Report Format (if applicable)** from the drop-down choices.
11. Select whether you want the report to email **Daily**, **Weekly**, or **Monthly**, and indicate the number for each.
12. Set corresponding options for **Frequency**.
13. Click **Preview Report** to see the report as it will appear.
14. Click **Save** to activate the report subscription. The report will send at the times you designated, to email recipients you entered.

HELPFUL INFORMATION

LINKS AND RESOURCES

- HHS Learning Portal log on page
<https://lms.learning.hhs.gov>
- HRSS Help Desk
Submit a help ticket: https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx
HRSS Hours of Operation: Monday through Friday: 8:00 AM to 4:30 PM
- NIH Training Center website
<http://trainingcenter.nih.gov>
- HRSS LMS Support website (Tip sheets, Online Manuals, LMS Resources, etc.)
<https://hr.nih.gov/hr-systems/lms>

APPENDIX A – ORGANIZATION CODES

Organization (org) Codes are also referred to as SAC Codes

HN	All of NIH
HNA	(OD) Immediate Office of the Director
HNB	(NIAMS) National Institute of Arthritis and Musculoskeletal and Skin Diseases
HNC	(NCI) National Cancer Institute
HND	(NCCIH) National Center for Complementary and Integrative Health
HNE	(NCMHD) National Center on Minority Health and Health Disparities
HNF	(FIC) John E. Fogarty International Center for Advanced Study in the Health Sciences
HNG	(CSR) Center for Scientific Review
HNH	(NHLBI) National Heart, Lung, and Blood Institute
HNJ	(CC) Clinical Center
HNK	(NIDDK) National Institute of Diabetes and Digestive and Kidney Diseases
HNL	(NLM) National Library of Medicine
HNM	(NIAID) National Institute of Allergy and Infectious Diseases
HNN	(NIA) National Institute on Aging
HNP	(NIDCR) National Institute of Dental and Craniofacial Research
HNQ	(NINDS) National Institute of Neurological Disorders and Stroke
HNR	(NCRR) National Center for Research Resources
HNS	(NIGMS) National Institute of General Medical Sciences
HNT	(NICHD) National Institute of Child Health and Human Development
HNU	(CIT) Center for Information Technology
HNV	(NIEHS) National Institute of Environmental Health Sciences
HNW	(NEI) National Eye Institute
HN2	(NINR) National Institute of Nursing Research
HN3	(NIDCD) National Institute on Deafness and Other Communication Disorders
HN4	(NHGRI) National Human Genome Research Institute
HN5	(NIAAA) National Institute on Alcohol Abuse and Alcoholism
HN6	(NIDA) National Institute on Drug Abuse
HN7	(NIMH) National Institute of Mental Health
HN8	(NIBIB) National Institute of Biomedical Imaging and Bioengineering

APPENDIX B - ENTERPRISE HUMAN RESOURCES INTEGRATION (EHRI) FIELDS

LEGEND



LMS Required
Fields



EHRI Required
Fields



Non Required Fields

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Item/Event Name*	Item or Event Title	Microsoft Excel 2007 for PC Users
Description	Description of the Item or Event entering Character limit: 1000	This class will expand the learner's knowledge of Microsoft Excel 2007.
Offering Start Date	Date the class started	MM/DD/YYYY
Ended/Completed On Date	Date the class ended	MM/DD/YYYY
Registration Date	Date the learner registered for the Item/Event	MM/DD/YYYY
Date Marked Complete*	Date the Item/Event was marked complete by an administrator	MM/DD/YYYY
Start Time (HH:MM)	Start time of the Item/Event	08:30
End Time (HH:MM)	End time of the Item/Event	04:30
Duration (HH:MM)	How many hours and minutes the class lasted	07:30
Delivery Type	Method the Item/Event was delivered in	Auditorium, Book, Coaching, Computer Laboratory, Conference, Correspondence Course, DVD/CD, Instructor led, Mentoring, Online Training, On the Job Training, Recorded Online Offering, Satellite, Scientific Laboratory, TeleConferencing, Traditional classroom, Video conferencing, Video Tape, Virtual Class, Web Cast, Workshop
ID*	Unique ID that identifies this entry	User Initials + Completion Date = JM09132008 where user = Jaime Martinez and Completion Date = 09/13/2008
Location	Location where course was taken. It could be a building or a city.	Examples: Executive Plaza North or Rockville
Marked Complete by	Search for the username of the person entering this record (yourself).	At first your username will display but once the record is saved the field will display your name.

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Continued Service Agreement Required Indicator (1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Accreditation Indicator (1102)	Indicates that the course has been accredited by an accreditation body.	N => No NA => Non Applicable Y => Yes
Training Accreditation Organization Type (1103)	The name and description of the accreditation organization	Leave empty if unknown.
Course ID From Vendor (1105)	The course ID as assigned by the vendor	Leave empty if unknown.
EHRI: Training Source Type (1120)	Source of the training which has been completed by the employee.	Foreign Governments and Organizations; Government External; Government Internal; Government State/Local; Non-government
EHRI: Default Training Purpose (1122)	Code representing the purpose of the training completed by the employee	Develop Unavailable skills; Future Staffing Needs; Improve Present Performance; Mandatory Training; New Work Assignment; Program/Mission Change; Retention
EHRI: Default Training Type (1124)	Code for the type of training which has been completed by the employee.	Acquisition; Adult Basic Education; Agency Required Training; Basic Computer Training; etc. <i>There are more options available in this drop-down</i>
EHRI: Training Credit (1126)	Amount of academic credit hours or continued education units earned by the employee for the completed training. This should match either credit hours or CPE hours. This value is used for reporting to EHRI.	If amount of credit is known, input the number. If not available or not applicable input 0.
EHRI: Training Credit Designation Type (1127)	Code for the type of academic credit hours or continued education units earned by the employee for the completed training course.	Continuing Education Units, Graduate Credit; NA; Post Graduate Credit; Undergraduate Credit
EHRI: Training Delivery Type (1129)	Code for the type of training delivery for the training course completed by the employee.	Blended; Conference or Retreat; Correspondence; Instructor Lead; On the Job; Technology based
EHRI: Training Credit Type Code (1131)	Code representing the type of credit hours the employee received for the completed training.	CPEs; Continuing Education Unit; NA; Quarter Hours; Semester Hours
Instructor Competencies (1200)	Description of areas the instructor should be competent in to teach the class.	If don't have any particular information on competencies for the instruction, leave empty.

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Multilingual Course (1201)	List of alternate languages for the course	Input the name of the other language the course was provided in. If not known or if it wasn't delivered in another language, leave empty .
Internal or External Course (1202)	Determine if the course is external or internal to the organization	External, Internal
Training Certification Type (1211)	Enter the type of certification earned after completing the course.	If any available enter the name of the certification, if don't know or if no certification was earned, leave empty .
Course Development Cost (1220)	The cost for developing the course. This only applies for internally developed courses the Federal Organization sponsored.	If no cost were incurred, leave empty .
EHRI: Estimated Training Tuition and Fees Cost (1221)	The cost of the training tuition and fee for training completed by the employee that was paid for by the Federal Government.	Enter the total cost paid for taking the course, if none available or no cost were incurred, input 0 .
EHRI: Training Materials Cost (1222)	Cost to the Government for the training materials used during the training unit completed by the employee. This includes all direct costs associated with purchasing the training materials used by the employee that is in addition to the tuition cost. It can include but is not limited to costs of supplies, cost of equipment, and cost of software used by the student during the training event.	Enter the total cost of training materials, if none available or no cost were incurred, input 0 .
EHRI: Continued Service Agreement Required Indicator(1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Duty Hours (1101)	Number of employee duty hours the employee used to complete the training unit.	Enter the amount of duty hours, if none available or none duty hours were used, input 0 .
EHRI: Training Non Duty Hours (1102)	Number of employee non-duty hours for the completed training course.	Enter the amount of non duty hours, if none available or none duty hours were used, input 0 .
EHRI: Training Per Diem Cost (1103)	Cost of the per diem (meal, lodging, misc. expenses) for training completed by the employee that was paid for by the Federal Government.	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no per diem was allotted, input 0.00
EHRI: Training Travel Cost (1104)	Cost for the travel, excluding per diem, for training completed by the employee that was paid for by the Federal Government	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no travel cost was allotted, input 0.00
EHRI: Training Nongovernment Contribution	Cost contributed by the employee or other non-government organizations for the training completed by	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no nongovernment contribution was

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Cost (1105)	the employee.	allotted, input 0.00
EHRI: Training Travel Indicator (1106)	Indicates if the employee traveled to attend the training course.	Y=Yes N=No, NA=Non Applicable
EHRI: Continued Service Agreement Expiration Date (1230)	The date to which an employee is obligated to remain in service as a stipulation for taking the training course.	If date applicable, enter it in the following format: MM/DD/YYYY. If not applicable or if unknown, enter NA .
Continuing Education Credits	If a field of study has been set up in the LMS for continuing education credits, you will be able to select it here.	Choose from availabilities in the LMS
Learners	Specify the learner(s) to whose transcript(s) this item should be recorded	Name, Score, Grade, Completion Status
Competencies	Specify whether any competencies were gained by the completion of the class	Choose from availabilities in the LMS and indicate proficiency level attained

Appendix C – HHS Learning Portal Domain Structure

