LEARNING MANAGEMENT SYSTEM (LMS)

ADDING SUPERVISORY TRAINING TRACKING AND EHRI INFORMATION TO COURSES — LOCAL LEARNING REGISTRAR

This QRG will guide the Local Learning Registrar through the task of adding supervisory training tracking and EHRI information to courses in the HHS Learning Portal/LMS.

Two specific fields should be populated at the course level:

- EHRI: Default Training Type
- Field of Study

For many existing supervisory-related courses, these fields will already be populated. As new courses are created, however, these fields will need to be completed.

1. Log into the LMS.

2. Click the Admin icon.

Figure 1 – Admin icon
3. Click the **Learning** link in the left navigation menu.

![Learning link](image)

**Figure 2 – Learning link**

4. Click the **Completed Learning** link in the left navigation menu.

![Completed Learning link](image)

**Figure 3 – Completed Learning**
5. Enter the last name of the Learner in the Person Names field then click the **Search** button.

![Completed Learning](image)

**Figure 4** – Person Names and Search button

6. Click the **View Completed Courses** link in the Actions column.

![Completed Learning](image)

**Figure 5** – View Completed Learning link
7. Click the **Add Completed Learning** link.

![Add Completed Learning link](image)

[Figure 6 – Add Completed Learning link](image)

8. Complete all required (*) transcript fields and relevant optional fields.  
**NOTE**: The data fields cannot be edited after the record is saved.

The following fields are mandatory:

- **Item/Event Name** – this should be the full descriptive name of the training item completed by the Learner.
- **Marked Complete Date** – you can use the Date Marked Complete pick icon or manually enter the date in MM/DD/YYYY format.
- **Course ID** - this value must be unique, not only for each item added to a Learner’s transcript, but across the entire LMS (all of HHS). If available, you should enter the Course ID provided by the organization/institution that delivered the training. If a Course ID is not provided by the training organization/institution, contact your IC LMS point-of-contact for the recommended Course ID format.
- **EHRI: Training Type Code (1122)** – select the option from the pull-down menu that most closely matches the reason for the training.
Figure 7 – Partial list of fields for Add Completed Learning to Learner's Transcript
Figure 8 – Remainder of fields for Add Completed Learning to Learner's Transcript
9. To specify that this learning event satisfies supervisory training requirements, select **Supervisory Program** from the EHRI: Training Type Sub Code (1124) pull-down menu.

![Figure 9 – Supervisory Program option in the EHRI: Training Type Sub Code (1124) pull-down menu](image)
NOTE: You will be unable to save the new completed learning item if any of the required fields are left blank. Ensure that all required fields have been completed to avoid the following error dialog box:

![Image of error message]

Figure 10 – Example error message for missing required field

10. To enter the Field of Study information, scroll to the bottom of the page and look for the Continuing Education Credits section. Click the Add Field of Study link.

![Image of Add Field of Study link]

Figure 11 – Add Field of Study link
11. Click the **Field of Study** pick icon.

12. Enter NIH Supervisory CLPs in the Name field then click the **Search** button.
13. Click the checkbox for NIH Supervisory CLPs to add it into the Field of Study field.

![Select Field of Study](image)

Figure 14 – Select checkbox
14. Enter the number of credits in the Default Credits field and then click the **Save** button.

**NOTE:** The Default Credits are typically 1 credit per 1 hour of instruction.

![Figure 15 – Default Credits field and Save button](image-url)
15. The Field of Study information has now been updated.

![Field of Study section](image)

**Figure 16 – Continuing Education Credits section populated with NIH Supervisory CLPs**
16. In the Learners section at the bottom of the screen, clear the Score field and then click the **Save** button.

![Figure 17 – Score field and Save button](image)

17. Add the appropriate comments/reasons to the Comments field, click the checkbox for the acknowledgement statement, and then click the **Save & Close** button.

![Figure 18 – Comments field, Acknowledgement statement checkbox, and Save & Close button](image)

If you experience trouble with this process, please refer to the **LMS Support Page**.

*TS98-A Adding External Learning Items to Transcripts with a Field of Study--Local Learning Admin*

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