



# COUNTY OF SAN MATEO LEARNING MANAGEMENT SYSTEM



## LMS User Guide for Employees



Access LMS at [www.smcgov.org/LMS](http://www.smcgov.org/LMS)

**Learning Management System User Guide for  
San Mateo County Employees**

Last updated 4/16/2018

The latest version of this manual can be found at:

<http://hr.smcgov.org/learning-management-system-lms>

# Table of Contents

This **Learning Management System (LMS) User Guide** is intended to help County employees navigate LMS and perform routine tasks, such as requesting sessions, adding external trainings, and for managers, sharing approval permissions (manager delegation), and much, much more.

## **For All Users:**

Accessing LMS.....	4
LMS Home Page.....	5
Searching for Training.....	6
Requesting Training.....	7
Withdrawing from a Session.....	8
Navigating Your Transcript.....	9
Adding External Training.....	10

## **For Supervisors/Managers:**

Approving Training Requests.....	11
Assigning Training.....	12
Setting up LMS Delegation.....	13
Running Your Team’s 20-Hour Training Report.....	15
Running Your Team’s Volunteer Activity Report.....	16

## **Resources:**

List of Department LMS Administrators.....	17
Frequently Asked Questions (FAQs).....	19
LMS Terms/Glossary.....	20
San Mateo County 20-Hour Training Policy.....	21

# Accessing LMS

Accessing LMS is easy, use the same user name and password that you use to log into your computer via OKTA!

**What is OKTA?** - Okta is a single sign-on solution that links many of the County's applications with your computer login information.

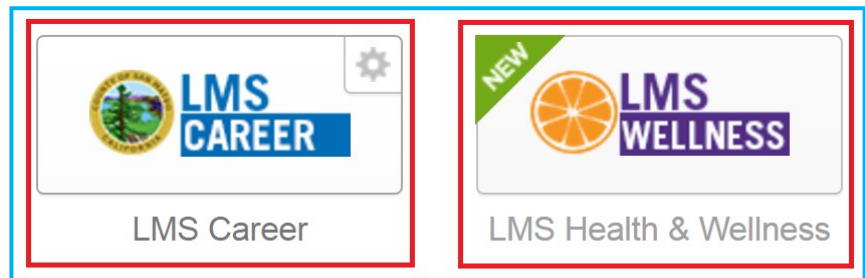
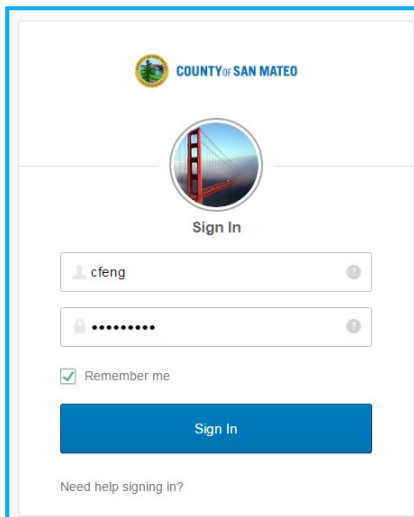
1. Go to [www.smcgov.org/LMS](http://www.smcgov.org/LMS) on a computer connected to the internet. Enter your Active Directory password to login (**the same password** you use to log into your PC every day.)

**NOTE:** If this is your *first time* logging into OKTA and/or you are experiencing log in issues, please **contact ISD or your department's IT team** to have them reset your OKTA password.

\* Library employees should login using their 9-digit employee ID at [sanmateocounty.csod.com](http://sanmateocounty.csod.com).

2. Select an LMS tile.

- For the **Career** site, select the **LMS Career** tile.
- For the **Health & Wellness** site, select the **LMS Wellness** tile.



3. Once you click on the LMS Career tile, you will be directed to the LMS homepage.



# LMS Home Page

This page will review the layout of the Career site's homepage. The Career site homepage has been redesigned to be more streamlined and user-friendly. From the homepage, there is 1-click access to the following functions:

- (1) Search for training sessions
- (2) Browse for trainings through a list
- (3) View your transcript
- (4) View the training calendar
- (5) Approve training requests made by employees (for supervisor/managers)
- (6) View your upcoming trainings

**COUNTY OF SAN MATEO LEARNING MANAGEMENT SYSTEM**

Search **1**

Home Learning Performance My Team Reports ILT Knowledge Content Admin Compliance

Hi Christian! **3**  
Have you reached your 20-hour training requirement? View your **Transcript** to check your progress and add external training!

**Welcome to the LMS Career Site**

**1** Search for Training...  
Search

**2** BROWSE

**3** TRANSCRIPT

**4** CALENDAR

**Your Inbox** **5**  
View transcript  
(0 approved training selection(s))  
(Registered for 1 training selection(s))

**My Training** **6**

	Due Date	Action
CF TEST curriculum	None	Open Curriculum

**At-A-Glance Training Schedule for County Employees**

**At-A-Glance Training Schedule**  
SEPTEMBER 2016 - JUNE 2017  
For San Mateo County Employees

This annual **Guide** provides you with an array of diverse training opportunities in a convenient, at-a-glance format to help you customize your training and skill development plan for the upcoming year

**20-Hour Training Policy**

**COUNTY OF SAN MATEO**

The County has established an annual policy for every employee to receive twenty hours of training per fiscal year. For supervisors, there is an expectation that eight of these twenty hours will be focused specifically on topics related to the supervision and management of employees.

Read more at <https://hr.smcgov.org/20-hour-training-policy>

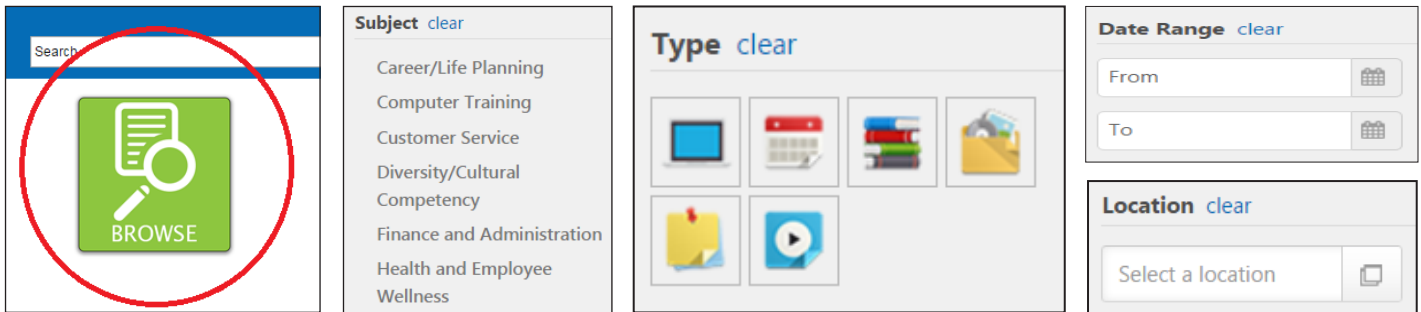
# Searching for Training

You can search for training several ways on the LMS Career site. They are outlined below.

A) You can access the **Search box** at the top-middle of the page.



B) **Browse for Training** – By clicking on the **Browse** button from the homepage, you can search for trainings by subject, type, date range, and title.



C) You can also use the training **Calendar page** to view upcoming trainings by clicking on the Calendar icon from the home page. From this view, you can see trainings on any given day and filter by Title, Location, and more.

A screenshot of the training calendar for February 2017. The calendar shows a grid of days with training events listed for each day. The "Month" view is selected. The events are as follows:


SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
29	30	31 Stepping Up and... 8:30 AM PST Excel Calculatio... 8:30 AM PST Difficult Convers... 2:00 PM PST	1 Theresa's Training 8:30 AM PST	2 Excel Calculatio... 8:30 AM PST	3 Theresa's Training 8:30 AM PST	4
5	6 Word Introductio... 8:30 AM PST	7 Excel Intermedia... 8:30 AM PST Leadership Basi... 8:30 AM PST Nuts and Bolts o... 9:00 AM PST	8 Word Introductio... 8:30 AM PST Delivering Cust... 8:30 AM PST Workers' Compe... 9:00 AM PST	9 Excel Intermedia... 8:30 AM PST	10	11
12	13 Skype for Busine... 8:30 AM PST Skype for Busine... 10:30 AM PST	14 Stepping Up and... 8:30 AM PST Serving Multi-Ge... 8:30 AM PST Excel Introductio... 8:30 AM PST	15 Outlook Essentia... 8:30 AM PST Coaching Others... 8:30 AM PST Conducting Faci... 8:30 AM PST	16 Excel Introductio... 8:30 AM PST Making the Trans... 8:30 AM PST Resolving Confli... 1:00 PM PST	17	18

# Requesting Training

As with all trainings, supervisor approval is required in order to attend.


1. Access LMS ([www.smcgov.org/LMS](http://www.smcgov.org/LMS))
2. Search for training titles/topics that interest you. Click on the **title** of the training event.
3. On the **Training Details** page, you will see all the information about the available training session(s). This includes the description, location, date, time, duration, and how many seats remain available.

Training results (5)



**Word Advanced 2013 (For Any Employee)**  
 Event | Human Resources Department | \$100.00  
 An advanced knowledge of Microsoft Word lets you take advantage of powerful techniques that increase efficiency and help you quickly design sophisticated documents. In this 8-hour session, you'll learn how to: a) customize the Word environment for quick access to often-used commands; b) record macros to complete a series of complex tasks at the tou...

4. To request training: Scroll down until you see the **Request** link on the right-hand side of window for the session you would like to attend (see below for an overview of the training details page).



**Word Advanced 2013 (For Any Employee)**  
 Event • Human Resources Department • 8 hours • \$100.00


Assign

An advanced knowledge of Microsoft Word lets you take advantage of powerful techniques that increase efficiency and help you quickly design sophisticated documents. In this 8-hour session, you'll learn how to: a) customize the Word environment for quick access to often-used commands; b) record macros to complete a series of complex tasks at the touch of a key; c) integrate other programs s... protect your documents from changes; and f) create a... previously offered. Prerequisites: Intermediate Word o...

**Pricing Information:**  
 County Employees - \$100  
 Court/City/Nonprofit/Special District Employees - \$100

Sessions Details

Show Available View Full Calendar



**28517 - Session Details**  
 Session • Human Resources Department • 8 hours • \$100.00

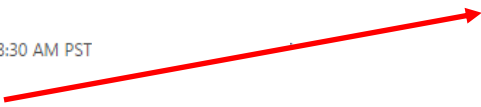
**Location**  
 RWC - Computer Training Room, 555 County Center, 4th Floor, REDWOOD CITY  
 English (US)

**Duration**  
 5/1/2017, 8:30 AM PST

Request

**What if the class is full?**  
 If your request is approved, you'll automatically be added to the session **waitlist**. If space opens up, you will be automatically enrolled and notified by email. Waitlists **expire 24 hours prior to the session date**.

**What if there are no sessions available?**  
 Click on the "Notify me of new sessions" link at the bottom of the window to add yourself to the **Interest List**. You will be automatically notified via email once new sessions are added. **Note:** After being notified, you will still have to request and receive approval to enroll in the class.



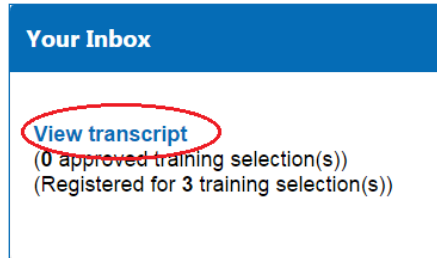
5. **You're done!** After you click **Request**, supervisor approval is required. Your supervisor will be notified of your LMS training request via email.
6. Once approved, the training session will be added to your LMS transcript. After the training has been completed, it will be added to the completed section of your transcript.

# Withdrawing from a Session

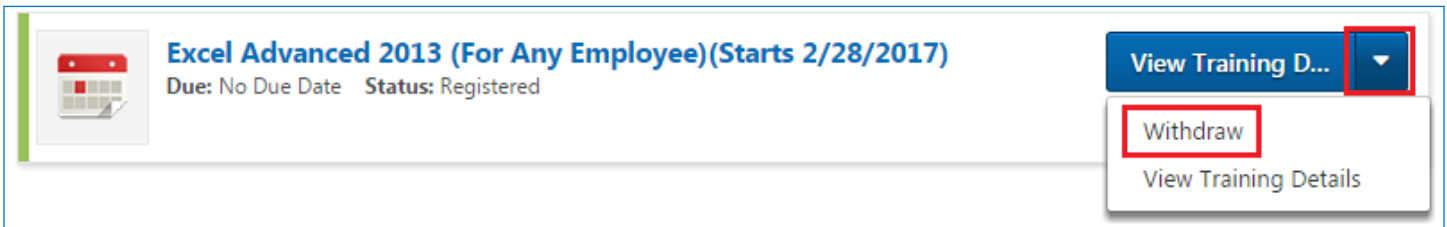
1. Access LMS ([www.smcgov.org/LMS](http://www.smcgov.org/LMS))

**NOTE:** To avoid charges to your department's budget, you must withdraw at least **3 business days** prior to the session start date. Please refer to the County's cancellation policy at <http://hr.smcgov.org/cancellation-policy>.

2. Go to your Transcript (click the Transcript button or the View Transcript link in Your Inbox on the homepage.)



3. Click on the **drop down arrow** next to the session, then click the **Withdraw** link.
4. On the Withdraw Registration screen, select a reason for your withdrawal and click **Submit**.



## Withdraw Registration

If you withdraw your registration for this session, you will immediately be withdrawn from the roster.

### Session Details

Event Name: Excel Advanced 2013 (For Any Employee)  
Date / Time: (1) 2/28/2017 8:30 AM - 2/28/2017 12:30 PM  
(2) 3/2/2017 8:30 AM - 3/2/2017 12:30 PM  
Location: RWC - Computer Training Room, 555 County Center, 4th Floor  
Price: Price Not Set

### SESSION WITHDRAWAL OPTIONS

Please select a reason

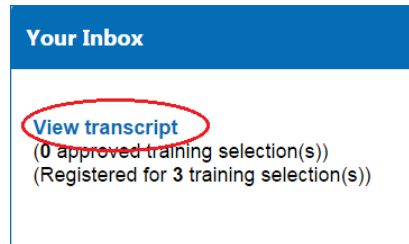
Please select a reason

- Other
- Cancelled Day of Class
- Found More Appropriate Training
- Illness/Family Emergency
- Inclement Weather
- Leaving the Company
- Personal Reasons
- Replaced with another employee (input name of replacement in comments box below)
- Reschedule due to conflict
- Travel Disruption
- Travel Disruption
- Vacation

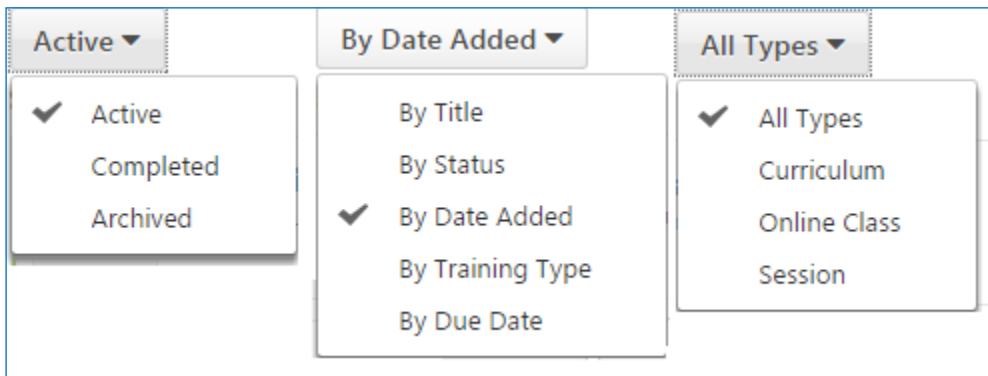


# Navigating your Transcript

1. Access LMS ([www.smcgov.org/LMS](http://www.smcgov.org/LMS))
2. Go to your **Transcript** (click the Transcript button or the View Transcript link in Your Inbox on the Home page.)



3. By default, your active trainings will be displayed. This includes all trainings that have been requested, registered for, are in progress, waitlisted, and past due.
4. You can filter your transcript with the following options:



**Note:** If there is a training you think you completed but does not show on your transcript, please make sure you change the filter to **“Completed.”**

Christian Feng > Transcript: Christian Feng

## Transcript: Christian Feng

Options ▾

**Number of Training Hours completed in Current Fiscal Year and the end date of Current Fiscal Year**

Use the transcript to manage all active training.

**13.08 HRS**  
AGGREGATE TRAINING COMPLETED

FISCAL YEAR ENDING **6/30/2017** COST **\$0.00**

Active ▾ By Date Added ▾ All Types ▾

Search for training

Search Results (5) **Transcript Filters**

**Skype for Business (For SM County Employees Only) - - - NE...**  
Due: No Due Date **Status: Registered** View Training D... ▾  
**Training Due Date & Enrollment Status**

**Effective Public Speaking (For SM County Employees Only)(S...**  
Due: No Due Date Status: Registered View Training D... ▾

# Adding External Training

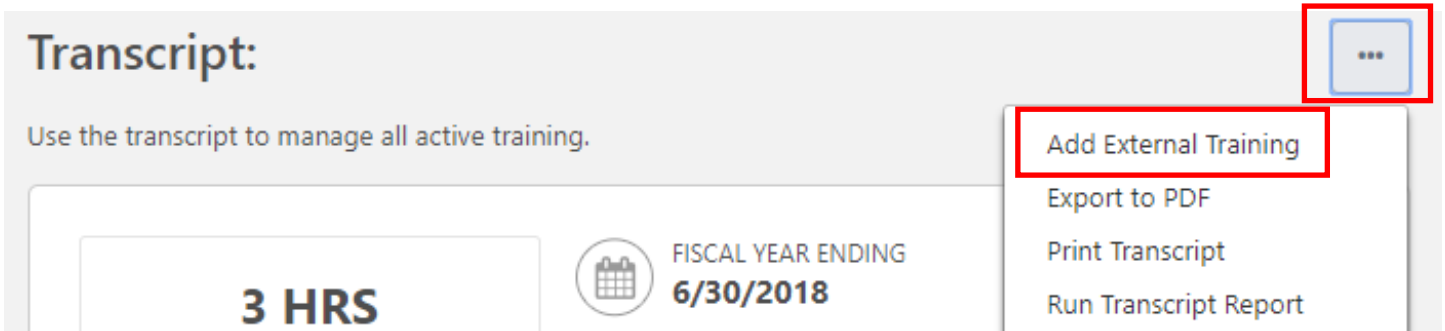
External trainings are defined as **any training taken that is not found within LMS**. These trainings can include classes, workshops, conferences taken/attended at outside events, and much, much more. External trainings can count towards the County's 20-hour training policy.

You may also use the external training form to add volunteer activity to LMS. Up to 4 hours of volunteer activity may be applied toward the 20-hour training policy on an annual basis.

The following steps for adding external training into LMS applies to **both past and future** trainings.

## A. Complete the External Training Form

1. Access LMS ([www.smcgov.org/LMS](http://www.smcgov.org/LMS))
2. Under the Learning tab, click **View Your Transcript**.
3. Under the ". . ." drop-down menu, click **Add External Training**.



## 4. Complete all fields, including:

- a. Training/Volunteering Title
- b. Training/Volunteering Description
- c. Training Provider / Volunteer Agency
- d. Training / Volunteering Dates
- e. Training Hours (total time excluding breaks)  
or  
Volunteer Hours
- a. Attachments (any relevant documents)

## 5. Click **Submit**.

After clicking submit, the training will appear on your transcript with the status of **"Registered."**

## B. Mark the External Training as Completed

6. Once the training date has passed, you can mark the external training as **"Completed."** Provide your manager with **documentation** that shows the training was completed. Click the **"Mark Complete"** button.

The training will now show as **"Pending Completion Approval"** until your supervisor/manager approves it.

A screenshot of the "Add External Training" form. The form has a title "Add External Training" and a paragraph of instructions. Below the instructions, there are several input fields, each highlighted with a red box: "Language" (set to English (US)), "Training / Volunteering Title \*", "Training / Volunteering Description", "Training Provider / Volunteer Agency", "Training / Volunteering Dates \*" (with start and end date pickers), "Training Hours" (with Hours and Minutes pickers), "Volunteer Hours" (with an "Enter Number" field), and "Attachment(s)" (with a "Drag and drop files here or Select a file" button).

# Approving Training Requests

The following will provide supervisors and managers with step-by-step instructions on how to approve employee training requests.

1. You will receive an email alerting you one of your employees has requested enrollment in a training session.
2. Access LMS ([www.smcgov.org/LMS](http://www.smcgov.org/LMS)) and find the **Your Inbox** section on your homepage.
3. In this section you will see an **Approve Training** link, and directly below it will display the number of requests pending approval. Click on the **Approve Training** link.

**Your Inbox**

[View transcript](#)  
(2 approved training selection(s))  
(Registered for 6 training selection(s))

[Approve training](#)  
(Your employees have 2 training request(s) pending approval)

4. Your employees' pending requests will be listed in the order they were received. From here you will be able to **Approve, Defer, or Deny** their request. Select one of these options.

Training Pending Approval				
<a href="#">Printable Version</a> <a href="#">Export to Excel</a>		(2 Results)		
<input type="text" value="Name"/> <input type="button" value="Search"/>				
Requested By	Training	Type	Date	Options
<b>Chow , Virginia</b> Personnel Services (Department) Human Resources Technician - Confidential (Position)	<b>Conflict Resolution: Dealing with Difficult People (For Any Employee)(Starts 3/29/2017)</b>	Initial	12/29/2016 9:01 AM	<div style="border: 1px solid red; padding: 2px;"> </div>
<b>Chow , Virginia</b> Personnel Services (Department) Human Resources Technician - Confidential (Position)	<b>TEST TRAINING</b>	Completion	12/29/2016 9:27 AM	<div style="border: 1px solid red; padding: 2px;"> </div>



- **Approve** - You approve the employee's request. An auto-email will be sent to the employee immediately notifying of your action.



- **Deny** - You deny the employee's request for training. An auto-email will be sent to the employee immediately notifying of your action.

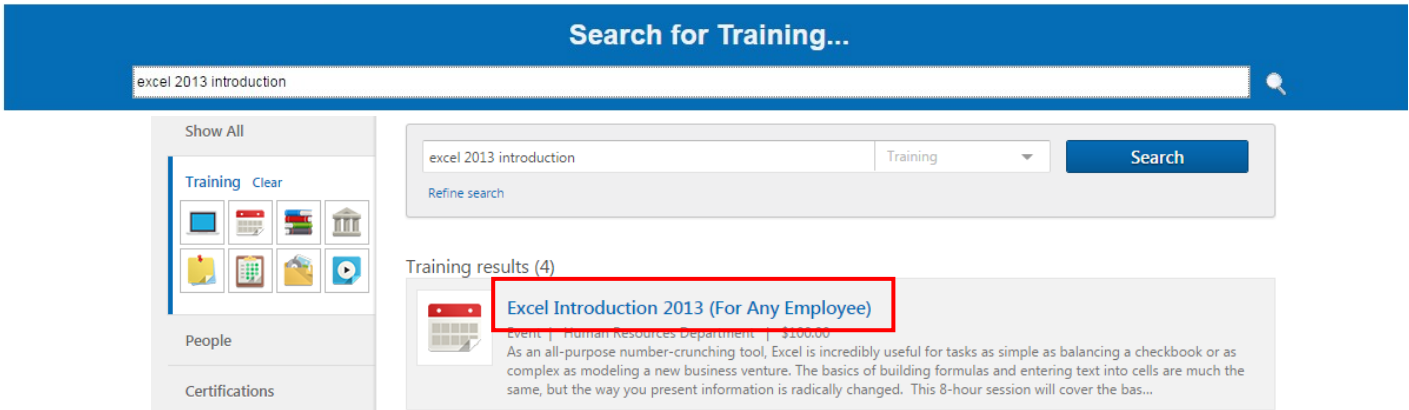


- **Defer** - You defer the employee's request to your supervisor.

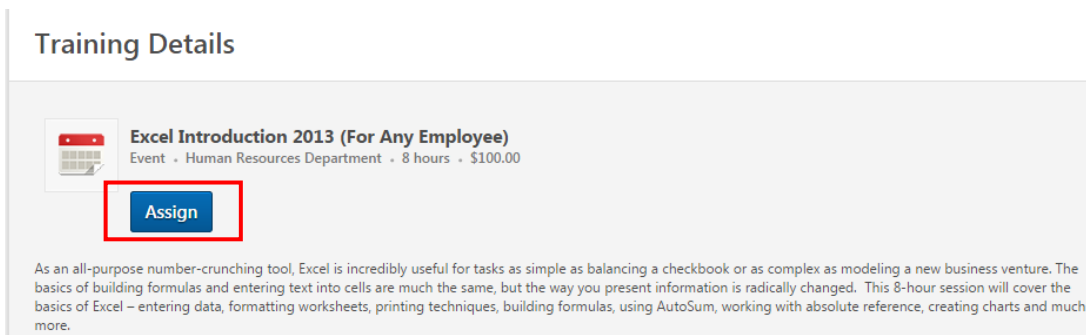
# Assigning Training

As a supervisor/manager, you have the ability to assign and pre-approve training for your direct reports. To do so, follow these steps:

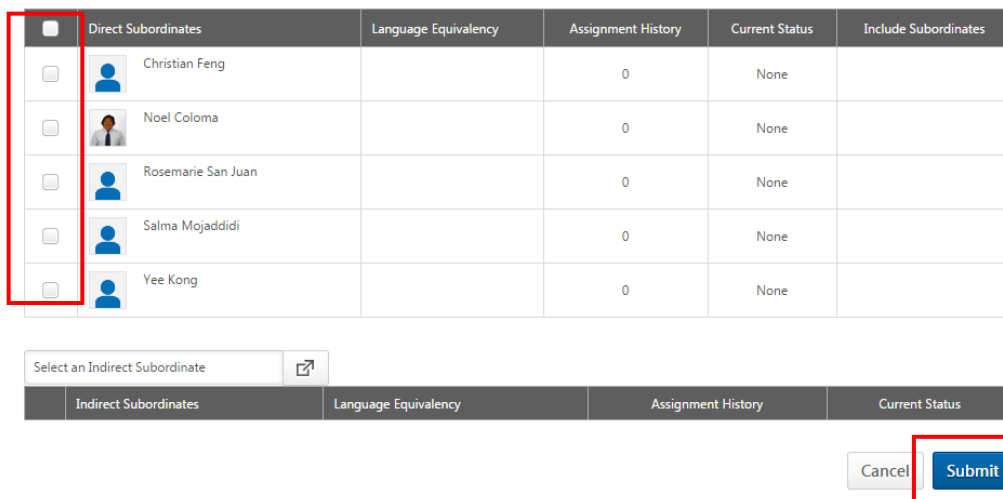
1. Access LMS ([www.smcgov.org/LMS](http://www.smcgov.org/LMS))
2. Search for the training you'd like to assign and click on the title.



3. Click on the **Assign** button.




4. Select the names of your direct reports to whom you'd like to assign the course, and click **Submit**.



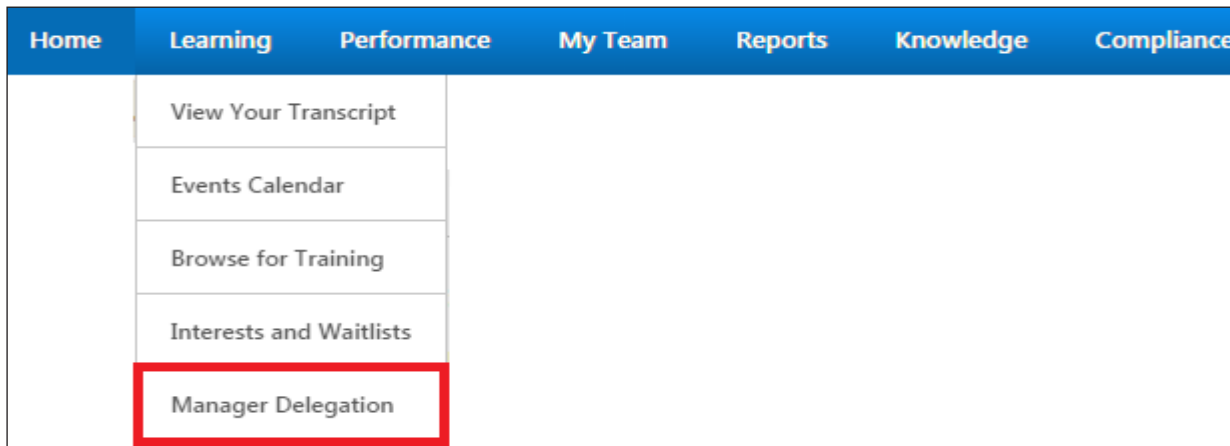
# Setting Up LMS Delegation

Manager Delegation allows supervisors and managers to share the responsibility of approving trainings for their direct reports. You would share approval permissions if you are out of the office so that requests are approved in a timely fashion, if you share staff with another supervisor/manager, etc.

1. Access LMS ([www.smcgov.org/LMS](http://www.smcgov.org/LMS))
2. Navigate to the **Learning** Tab.
3. Click on **Manager Delegation**.



**NOTE:** Once a delegation is set up, it lasts indefinitely until the supervisor/manager removes it.



4. Click on **Share Your Learning Permissions**.

**Manage Subordinate Learning**

View the Learning information for your employees.

[Share Your Learning Permissions](#) (allows you the ability to grant other users access to your subordinates' learning information.)

[Manage Pending Requests](#) (Displays a list of pending requests for which you are the approver)

Manage Subordinates	
SUBORDINATES	
NAME	VIEW TRANSCRIPT
<input type="checkbox"/> Noel Coloma	
<input type="checkbox"/> Christian Feng	
<input type="checkbox"/> Yee Kong	
<input type="checkbox"/> Salma Mojaddidi	
<input type="checkbox"/> Rosemarie San Juan	

5. Click on the **Add Delegate** link.

**Share Learning Permissions**

**Please Note:** Sharing your permissions with other users will not affect the permissions that you currently have. The users granted access will not have the ability to share these permissions with others.

- Edit Permissions - Remove Delegate

**Share Your Permissions**

With whom would you like to share your manage subordinates permissions? [Add Delegate](#)

The users listed above will have Manage Subordinate access for which of the following users?

Feng, Christian

San Juan, Rosemarie

Mojaddidi, Salma

Coloma, Noel

Kong, Yee

Include Subordinates

Include Subordinates

Include Subordinates

Include Subordinates

Include Subordinates

[Define Access by Permission](#)

# Setting Up LMS Delegation (Cont.)

- A new window will open that will allow you to search for the employee you would like to share your LMS approval permissions with.
- Once you have found the employee you are looking for, click on the “**Plus (+)**” icon to the left of the employee’s name. Scroll to the bottom of the pop-up window and click **Done**.

### Select User

Search is limited to 1000 records only

**Search**

Last Name:  ID:  Manager's Last Name:   
 First Name:  User Name:

(4 Results)

**Search Results**

ADD	NAME	IDENTIFIER	ID	USER NAME	MANAGER
<input checked="" type="checkbox"/>	<b>Aponte, Gabriel</b>	1-Career (Department) Associate Management Analyst (Position)	000024877	000024877	Aponte (Admin), Gabe

8.

You can select which of your direct reports you’d like to share permissions for. Once you’ve made your selections, click **Save**.

### Share Learning Permissions

**Please Note:** Sharing your permissions with other users will not affect the permissions that you currently have. The users granted access will not have the a

**Share Your Permissions**

With whom would you like to share your manage subordinates permissions?

- Aponte, Gabriel
- Feng, Christian
- San Juan, Rosemarie
- Mojaddidi, Salma
- Coloma, Noel
- Kong, Yee

The users listed above will have Manage Subordinate access for which of the following users?

- Include Subordinates
- Include Subordinates
- Include Subordinates
- Include Subordinates
- Include Subordinates

9. To **end the delegation**, click on the **trash can** icon next to the delegate’s name.

- Reminder:** Delegations remain in place **indefinitely** until manually removed by the supervisor/manager.

### Share Learning Permissions

**Please Note:** Sharing your permissions with other users will not affect the

**Share Your Permissions**

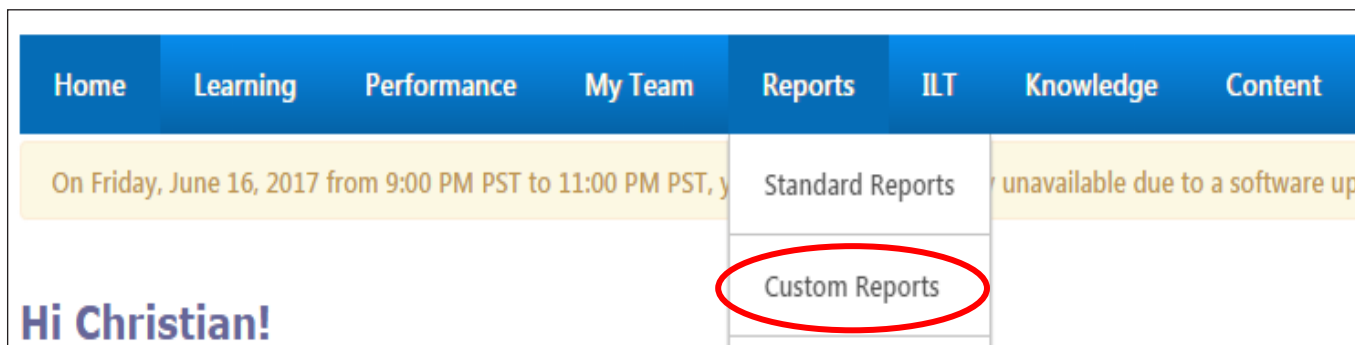
With whom would you like to share your manage subordinates permissions?

- Aponte, Gabriel

# Running Your Team's 20-Hour Training Report

The following instructions will assist supervisors and managers in running their team's 20-hour training report. The County has established an annual training policy for every employee to receive a minimum of twenty hours of training per fiscal year. This is an easy way to monitor your team's progress.

1. Access LMS ([www.smcgov.org/LMS](http://www.smcgov.org/LMS))
2. Once on the LMS homepage, click on the **Reports** tab and select **Custom Reports**.



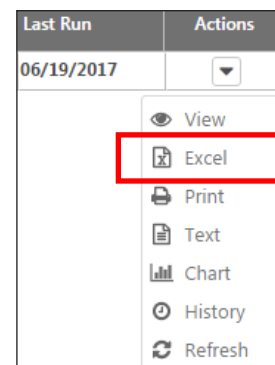
3. Find the line item titled **Supervisor Training Report (FY 20XX-XX)**. Under the Actions column, click on the upside-down triangle and select **Refresh**.

The screenshot shows the LMS Reports page. The 'Reports' title is at the top. Below it, there is a lightbulb icon and instructions: 'Click "All Folders" on the left to view all your reports. Click any folder to view reports within that folder. Right click a folder to view options for it. Drag and drop folders to change the tree. Use the New button to create a new folder or report. Drag and drop a report to a folder to move it to that folder. To view data for the last three runs of a report, click "History" in the Actions column. For the most recent data, click "Refresh" to process the report.' Below this, there is a 'Folders' sidebar with 'All Folders' and 'Transcript Report'. The main area is titled 'Custom Report' with a 'Show Me' button. There are search filters for 'All Reports', 'Ran Anytime', and a 'Search' button. Below the filters is a table with columns: Title, Type, Creator, Folder, Last Run, and Actions. The row for 'Supervisor Training Report (FY 2016-17)' is highlighted in red. The 'Actions' column for this row is circled in red.

Title	Type	Creator	Folder	Last Run	Actions
Supervisor Training Report (FY 2016-17)	Transcript Report	Aponte (Admin), Gabe	Transcript Report	06/19/2017	▼

4. Next, under the **Last Run** column, the status will be changed to "Processing.." *Allow up to 3 minutes for the report to process.* Once the report has finished processing, the status under the last run column will change to today's date.
5. Under the **Actions** column, click on the upside down triangle and select **Excel** to generate a spreadsheet with your direct reports' training data.
6. **If you wish to run the training report again at a later date, repeat steps 3-5.**

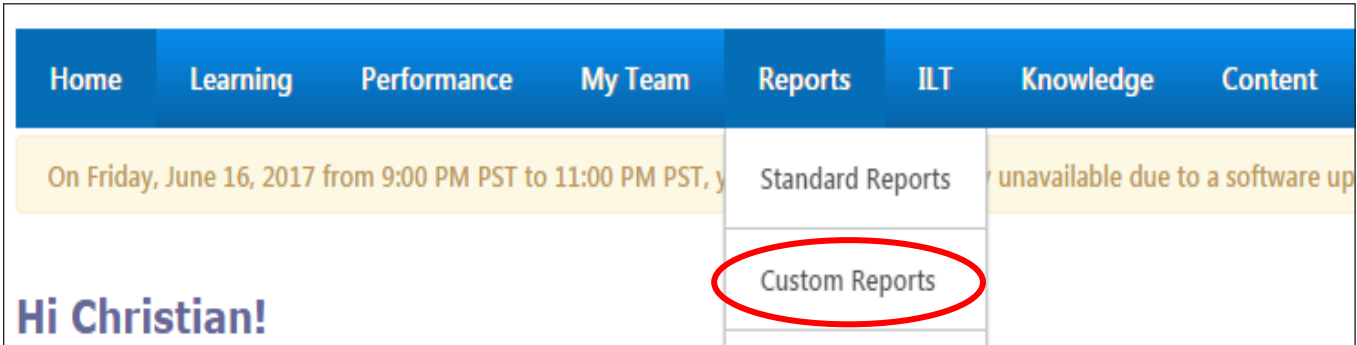
**NOTE:** Only your direct reports as they are assigned in **Workday** will show up on the report. For other employees, have your LMS Administrator run a **Departmental 20-Hour training report** for you.



# Running Your Team’s Volunteer Activity Report

The following instructions will assist supervisors and managers in running their team’s volunteer activity report. The County encourages employees to engage in volunteerism, and up to four hours of volunteer service can be applied toward the annual 20-hour training requirement. This report provides an easy way to monitor your team’s volunteer activity throughout the year.

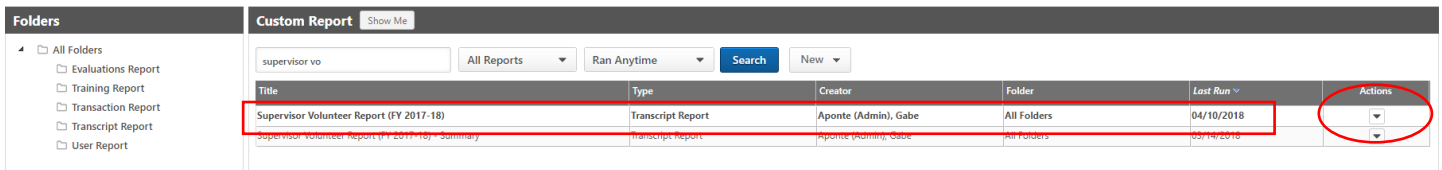
1. Access LMS ([www.smcgov.org/LMS](http://www.smcgov.org/LMS))
2. Once on the LMS homepage, click on the **Reports** tab and select **Custom Reports**.



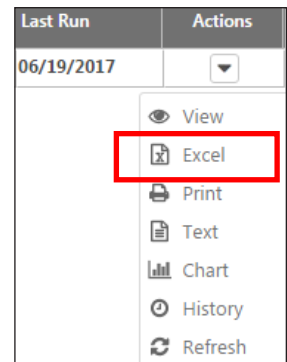
3. Find the line item titled **Supervisor Volunteer Report (FY 20XX-XX)**. Under the Actions column, click on the upside-down triangle and select **Refresh**.

## Reports

Click "All Folders" on the left to view all your reports. Click any folder to view reports within that folder. Right click a folder to view options for it. Drag and drop folders to change the tree. Use the New button to create a new folder or report. Drag and drop a report to a folder to move it to that folder. To view data for the last three runs of a report, click "History" in the Actions column. For the most recent data, click "Refresh" to process the report.



4. Next, under the **Last Run** column, the status will be changed to “Processing..” *Allow up to 3 minutes for the report to process.* Once the report has finished processing, the status under the last run column will change to today’s date.
5. Under the **Actions** column, click on the upside down triangle and select **Excel** to generate a spreadsheet with your direct reports’ training data. Employees who do not appear on this report have not entered volunteer activity in LMS.
6. **If you wish to run the training report again at a later date, repeat steps 3-5.**



**NOTE:** Only your direct reports as they are assigned in **Workday** will show up on the report.



# Department LMS Administrators (Updated 2/1/2018)

The most up to date version of the LMS Administrators list can be found at: <http://hr.smcgov.org/county-lms->

<b>Department</b>	<b>LMS Administrator</b>	<b>Phone Number</b>
<b>Assessor-Clerk-Recorder-Elections</b>	Julieta Fernandez	(650) 363-4779
<b>Child Support Services</b>	Sherrie Ramos	(650) 363-4818
<b>Controller</b>	Jeremy Reyes Rose Rushworth	(650) 363-4777 (650) 363-4778
<b>Coroner</b>	Emily Tauscher	(650) 312-5223
<b>County Counsel</b>	Shirley Lectura Heather Hardy	(650) 363-4684 (650) 363-4679
<b>County Manager's Office/Board of Supervisors</b>	Alicia Garcia	(650) 363-4634
<b>Agriculture / Weights &amp; Measures</b>	Maria Luna	(650) 363-4700
<b>Public Safety Communications</b>	Robert Bustichi Elise Moeck	(650) 363-4342 (650) 363-4615
<b>District Attorney</b>	Debbie Padilla Andy Sedik	(650) 363-4685 (650) 363-4871
<b>Health System</b>		
Aging & Adult Services	Sue Fisk Maira Mendoza	(650) 573-2533 (650) 573-4236
Behavioral Health & Recovery Services	Moetoto Mati Nicola Freeman	(650) 573-2495 (650) 573-2773
Correctional Health	Joanna Nuevo William Taylor	(650) 363-4152 (650) 363-7838
Emergency Medical Services	Theresa Smith Garrett Fahey	(650) 573-3782 (650) 573-2009
Environmental Health	Joseph Padilla Jean DeTar Anapatria Mercado	(650) 372-6234 (650) 372-6263 (650) 372-6228
Family Health	Laurie Washer	(650) 573-2248
Health Administration	Wanda Showaker	(650) 573-2263
LEAP Institute	Mary Brinig	(650) 573-2945
Public Health, Policy & Planning	Wanda Showaker	(650) 573-2263
San Mateo Medical Center	Akram Abdul Cader Cynthia Delmo Stacy Glocke Jessica Frihart	(650) 573-2271 (650) 573-2437 (650) 573-2671 (650) 573-5044

# Department LMS Administrators (Updated 2/1/2018)

The most up to date version of the LMS Administrators list can be found at: <http://hr.smcgov.org/county-lms-administrators>

<b>Department</b>	<b>LMS Administrator</b>	<b>Phone Number</b>
<b>Housing</b>	Larisa Margulis Norman Pascoe	(650) 802-3379 (650) 802-5008
<b>Human Resources</b>	Debbie Kong Ezrah Cambe Rose San Juan	(650) 363-1915 (650) 599-1151 (650) 363-4733
<b>Human Services Agency</b>	Kathy Merlo Robert Burnett Pamela Storm	(650) 802-7965 (650) 802-7648 (650) 802-7941
<b>Information Services</b>	Kristine Anora Emmanuel Ufot Vanita Narayan Shawn Yu	(650) 363-4548 (650) 599-7499 (650) 207-1940 (650) 599-7468
<b>Library</b>	Karina Labrenz	(650) 312-8822
<b>Office of Sustainability</b>	John Cho Mike Bolander	(650) 363-1229 (650) 363-4791
<b>Parks</b>	Francesca Nielsen Erika Duenas	(650) 599-1466 (650) 599-1391
<b>Planning &amp; Building</b>	Madeleine Payumo	(650) 599-7311
<b>Public Works</b>	Krysta Caronongan Manon Patterson	(650) 599-1442 (650) 599-1428
<b>Probation</b>	Bridget Love	(650) 312-5261
<b>SamCERA</b>	Gladys Smith	(650) 363-4821
<b>Sheriff's Office</b>	Gina Sheridan Jennifer Prado	(650) 573-2520 (650) 363-4530
<b>Tax Collector</b>	Angey Rivera	(650) 363-4398
<b>Treasurer/Revenue Services</b>	Tiffany Htwe Laura Williams	(650) 599-1239 (650) 363-4977

# Frequently Asked Questions

## 1. How do I sign in? (pg. 4)

- I. Access LMS via OKTA on a computer connected to the internet.
- II. To Access LMS:
  - **OKTA Users** - Use your Computer / Active Directory login. Once logged in, select the LMS Career or LMS Wellness tile.
  - **Library Users** - Log into LMS at [sanmateocounty.csod.com](http://sanmateocounty.csod.com), and select the **My Career Development** or **My Personal Health & Health & Well-Being** site.
- III. Your personalized homepage will appear when you log in. You can return to your homepage by clicking on the **Home Tab** near the top of the page.

## 2. Help! I forgot my password. (pg. 4)

If you are logging in via OKTA, your password is the same password you used to log into your PC.

If you are a **Library** employee, contact your **LMS Administrator (pg. 17-18)**

## 3. Help! I can't find the LMS tiles on my OKTA dashboard.

Contact your department's [LMS Administrator](#) for assistance (pg. 17-18)

## 4. What's the difference between the two LMS sites?

- **Career Site** - This site contains information about work-related training and development activities. The information contained on this site is viewable to your supervisor/manager. Supervisor approval is required in order to participate in these development activities
- **Health & Wellness Site** - This site contains information about health and wellness and related activities. The information contained on this site is not viewable by your supervisor/manager. Verbal approval is required from your supervisor/manager for time off (if attending during work time) to participate in activities within this site, or they can be taken on your own free time.

## 5. I took an external training – is there a way I can add that to my LMS transcript? (pg. 10)

**Yes.** Under the Learning tab, click on "View Your Transcript." Then, click on "Add External Training." Complete the pop-up window completely and then click on "Submit." For step-by-step instructions on this process, please see the [Adding External Training](#) Instructions on page 10.


**View more FAQ's** at: <http://hr.smcgov.org/faqs-and-login-help-learning-management-system-lms>



**For other LMS questions**, contact your department's [LMS Administrator](#). (pg. 17-18)

# LMS Terms/Glossary

**Event:** Training courses; i.e. Intermediate Excel 2010, Public Speaking, etc.

**Session:** A specific date, time, and location that a training is offered for an event; there may be multiple sessions scheduled for one event.

**Instructor-Led Training (ILT):**  A traditional classroom training, in which an instructor teaches a course to a room of learners.

**Online Training (OLT):**  Training that takes place at your computer via streaming web content or material  downloaded directly to your PC.

**Curriculum:** Multiple trainings grouped together in a series.

**Interest Lists:** A list that employees can sign up for to be notified when a particular class that currently has no available spaces or upcoming sessions becomes available again.

## ***User Statuses:***

**Completed** – Training has been taken and credit issued to the user.

**In Progress** – Training has been started but not yet completed. Often seen with online trainings that have been partially completed.

**Registered** – User has enrolled in and is guaranteed a spot in the training session.

**Waitlisted** – User is on the waitlist to be enrolled in the training session but is not guaranteed a spot.

**Withdrawn** – User had previously been enrolled in a training session but withdrew from the class, forfeiting his/her spot.

**Pending Evaluation / Past Due** – Deadline has passed for an assigned training and the user has yet to complete it.

**Cancelled** – User had either been waitlisted or enrolled in a session that was cancelled by LMS admins.

# San Mateo County's 20-Hour Training Policy

The County initiated a 20-Hour Training Policy to further develop and promote a highly skilled workforce that values continuous learning and skill development. As such, all regular, permanent, provisional and term County employees are expected to attend a minimum of 20 hours of training annually. Additionally, as part of these 20 hours Supervisors/Managers are required to take a minimum of 8 hours of supervisory training.

Managers and supervisors need to encourage and support attendance at training and development programs and activities. The County's Training Policy promotes and fosters individual and organizational effectiveness by:

- Optimizing employee development, growth and productivity
- Enhancing organizational productivity, effectiveness and accountability
- Creating, promoting and fostering an organizational environment that values development and growth opportunities for all employees

## How can I meet the County's 20-Hour Training Policy?

Employees can reach their 20 hours in a variety of ways, including:

- **Internal:** Internal training includes training offered/hosted by your department and/or the County during worktime through the [LMS](#) and [Training Guide](#).
- **External:** With your Supervisor's approval, you can also apply [external training](#) toward the 20-Hour Training Policy. External training can include training taken outside the County, including training while off-duty (college courses, professional association meetings, etc.)

## What types of training may be applied toward the 20-Hour Training Policy?

- **On-the-job training:** Training that you received during the first few weeks of employment and/or new position.
- **Division/Unit in-services:** On-the-job in services, presentations, retreats, etc., where new workflows, practices, procedures were taught and/or demonstrated.
- **Special Projects/Assignments:** Training that you received as a result of additional duties/opportunities.
- **Department-Specific** trainings.
- **Profession/career-Specific training:** Academic coursework, continuing education units (CEUs), recertifications, workshops, seminars, conferences, informational brown bag lunches, professional association meetings, etc.
- **Training sessions provided by the County, both instructor-led (classroom) and online offerings.**
  - ◇ [www.smcgov.org/LMS](http://www.smcgov.org/LMS)
  - ◇ [https://hr.smcgov.org/training\\_catalog](https://hr.smcgov.org/training_catalog)

# San Mateo County's 20-Hour Training Policy (Continued)

## **How are my 20 hours of training tracked each fiscal year?**

Training hours for sessions entered in the County's LMS will be shown on your transcript and will appear on LMS department reports. You will need to manually add external training (training not created/entered in the LMS) into LMS for hours to be captured. The County Manager provides a bi-annual report to your department head to show your department's progress towards the 20-Hour Training Policy. Reports are typically provided to your department head mid-fiscal year (December) and again in May just prior to the end of the fiscal year. Supervisors can check their team's progress by running their own reports in LMS.

## **How can my department's LMS Administrator help?**

Each department has one or more designated LMS Administrators who possess LMS expertise. Their roles are critical in capturing the training activity for your department and in helping employees be successful when accessing and navigating the LMS. Their role and duties include:

- Entering department-specific training events and sessions when requested to do so by their department in order for training hours to be tracked in LMS
- Running department reports upon request to show progress and compliance with the 20- Hour Training Policy
- Providing LMS help desk services when users have difficulty navigating or accessing the LMS

## **Who should I contact with any questions about this Policy?**

If you have questions, talk directly to your supervisor and/or manager. Having conversations about this 20-Hour Training Policy is ideal in your one-on-one meetings, where you can share and discuss your development goals and career aspirations. At these meetings, you and your supervisor will have the opportunity to plan your 20 hours of training each fiscal year.

## **Supervisor Approval is Required**

All trainings, workshops, conferences, etc., that you wish to apply toward the County's annual 20-Hour Training Policy must be approved by your supervisor.