

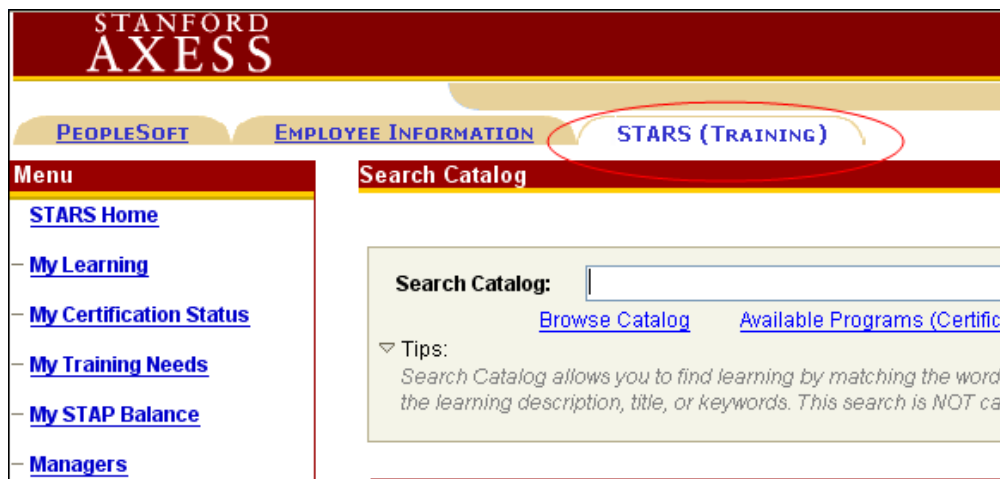
# Job Aid: Manager Self-Service in STARS

The Manager Self-Service feature in STARS enables managers to view the Learning Histories of their direct reports (and those in the organizational hierarchy below their direct reports) in STARS. Managers can also view employees' Certification Status and add courses/programs as "planned" activities to employees' My Learning pages.

## Access Manager Self-Service

Manager Self-Service is available via the **STARS (Training)** tab within the Axxess portal. To access it:

1. Point your web browser to <http://axess.stanford.edu>.
2. Login with your SUNet ID and password.
3. Click on the **STARS (Training)** tab.



4. Click on the **Managers** link in the main menu on the left. This link is only available to individuals with staff reporting directly to them.



The resulting page displays the list of your direct reports and provides options for various actions related to your team's learning activities.

## Team Members

Team Members lists all of your direct reports. Click one or more checkboxes, choose an Action, and click Go to view learning information for the selected person(s). To view a team member's direct reports, select a name in "View Team Members Reporting To:" and click Go.

### Pending Approvals

You currently do not have any pending learning approvals to approve or deny.

### Team Members

**View Team Members Reporting To:**

**Direct Reports -- Walter Disney** [Customize](#) | [Find](#) | [View All](#) First  1-6 of 6  Last

	Name	Job Title
<input type="checkbox"/>	Cowboy Woody	Internal Auditor
<input type="checkbox"/>	Mickey Mouse	Information Systems Specialist
<input type="checkbox"/>	Robin Hood	Internal Auditor
<input type="checkbox"/>	Snow White	Internal Auditor
<input type="checkbox"/>	Tinker Bell	Administrative Associate
<input type="checkbox"/>	Winnie daPooh	Admin Services Administrator

[Select All](#)  [Clear All](#)

**\*Action:**

[Team Learning History](#) [Team Certification Status](#) [Search Catalog](#) [Supplemental Learning](#)

## Drill Down through Your Team Hierarchy

You may view the list of team members who report to one of your direct reports by choosing a name from the "View Team Members Reporting To:" dropdown list and clicking the **Go** button:

**Team Members**

**View Team Members Reporting To:**

The resulting page displays the selected employee's direct reports:

**Team Members**

**View Team Members Reporting To:**

**Direct Reports -- Snow White** [Customize](#) | [Find](#) | [View All](#) First  1-2 of 2  Last

	Name	Job Title
<input type="checkbox"/>	Bashful Dwarf	Internal Auditor
<input type="checkbox"/>	Doc Dwarf	Internal Auditor

You may drill down in this way all the way to the bottom of your team's hierarchy.

Direct Reports -- Doc Dwarf		Customize   Find   View All
	Name	Job Title
<input type="checkbox"/>	Grumpy Dwarf	Internal Auditor
<input type="checkbox"/>	Sleepy Dwarf	Internal Auditor
<input type="checkbox"/>	Sneezy Dwarf	Internal Auditor

### View Team Members' Learning Histories:

1. Click the checkbox beside one or more team members' name(s).
2. Choose "View Learning History" from the Action dropdown menu.
3. Click the **Go** button.

\*Note that you may click the **Team Learning History** link on the lower left without having to click all the checkboxes to see the complete learning history for the entire team.

Team Members

View Team Members Reporting To: Snow White [Go]

Direct Reports -- Snow White		Customize   Find   View All	First 1-2 of 2 Last
	Name	Job Title	
<input checked="" type="checkbox"/>	Bashful Dwarf	Internal Auditor	
<input checked="" type="checkbox"/>	Doc Dwarf	Internal Auditor	

Select All    Clear All   \*Action: ...Select... [Go]

[Team Learning History](#)   [Team Certification Status](#)   [Search Catalog](#)

...Select..  
Add Learning to Plan  
Check Certification Status  
View Learning History

The resulting page displays the Learning Histories for all selected team members:

**Team Member Learning**

For:

View All | First  Last

Name	Title	Type	Status	Status Date
Bashful Dwarf	<a href="#">Property Reports in ReportMart3</a>	Classroom (hands-on)	Enrolled	09/23/08
Doc Dwarf	<a href="#">Moving from Sundial to Stanford Calendar</a>	Classroom	Enrolled	06/30/09
Doc Dwarf	<a href="#">Effective Communication to Build Work Relationships</a>	Classroom	Enrolled	07/02/09
Doc Dwarf	<a href="#">Success at Work Through Clarifying Personal Motivators</a>		Requested	06/26/09
Bashful Dwarf	<a href="#">How to Get More of What You Want From Your Job</a>	Classroom	Completed	04/23/02
Bashful Dwarf	<a href="#">Introduction to iJournals</a>	Classroom	Completed	10/09/03
Bashful Dwarf	<a href="#">Labor Schedules</a>	Classroom	Completed	11/18/03
Bashful Dwarf	<a href="#">Property Policies and Procedures</a>	Classroom	Completed	10/28/03
Bashful Dwarf	<a href="#">Managing Customer Interactions</a>	Classroom	Completed	02/16/01
Bashful Dwarf	<a href="#">Introduction to Project Management</a>	Classroom	Completed	04/24/02

Note the various View options available for the results

This search result includes a combined 65 records of training events for Doc Dwarf and Bashful Dwarf. The current view shows the first 10 items; left and right arrows allow scrolling through the complete list, or you can View All on one long screen. The spreadsheet icon offers the option to export the search results to Excel.

- Click on any **column title** (Name, Title, Type, Status, Status Date) to sort the results by that column.
- Click on any **course title link** to see detailed information about that particular course.

### Check Team Members' Certifications:

You can view what certifications your team members have completed (or currently have in progress) by clicking the **Team Certification Status** link on any Team Members page. To view certification information for selected team members, click the checkbox(es) beside the team members' name(s), choose Check Certification Status from the "Action" dropdown menu, and click the Go button:

**Team Members**

View Team Members Reporting To:

**Direct Reports -- Snow White** [Customize](#) | [Find](#) | [View All](#) First  Last

	Name	Job Title
<input checked="" type="checkbox"/>	Bashful Dwarf	Internal Auditor
<input type="checkbox"/>	Doc Dwarf	Internal Auditor

[Select All](#)    [Clear All](#)   **\*Action:**

[Team Learning History](#)   [Team Certification Status](#)   [Search Catalog](#)   [Supplemental Learning](#)

The resulting page displays certification information for the selected team member(s):

### Certification Status

**Certifications**

**View:** All Certifications ▾

**For:** All Learners ▾

Name	Program Name	Status	Status Date	View History
Bashful Dwarf	Cardinal Curriculum Level 1	Complete	06/10/08	<a href="#">View History</a>
Bashful Dwarf	HIPAA Fundamentals Certification	Complete	09/05/08	<a href="#">View History</a>

[Team Members](#) [Team Learning History](#) [Search Catalog](#) [Supplemental Learning](#) [Return to Previous Page](#)

You may further refine your search to display certifications of a selected status (Certified, Expired, or Warning):

### Certifications

**View:** All Certifications ▾

**For:** All Learners ▾

**View:** All Certifications ▾

- All Certifications
- Certified
- Expired
- Warning

Name	Program Name	Status
Bashful Dwarf	Cardinal Curriculum Level 1	Complete
Bashful Dwarf	HIPAA Fundamentals Certification	Complete

## Add Learning to a Team Member's Plan

As a manager you can add learning activities to the Learning History/Plan for any of your team members. You may add activities directly from the STARS catalog, or manually add information about external learning activities not found in STARS ("Supplemental Learning").

### To Add Learning from the STARS Catalog:

1. On the Team Members page, click the **checkbox** to select a team member, choose **Add Learning to Plan** from the Action pulldown menu, and click **Go**.

<input type="checkbox"/>	Tinker Bell	Administrative Associate
<input checked="" type="checkbox"/>	Winnie daPooh	Admin Services Administrator

[Select All](#)  [Clear All](#)

**Action:** View Learning History ▾

- Select...
- Add Learning to Plan
- Check Certification Status
- View Learning History

- The Search Catalog page appears. **Enter a course title or other keyword** relevant to the training activity you'd like to add to your employee's Training Plan and click the **Search** button:

**Search Catalog:**  Search

[Browse Catalog](#)    [Available Programs \(Certifications/Curricula\)](#)

▼ **Tips:**  
*Search Catalog allows you to find learning by matching the words you enter to the words that appear in the learning description, title, or keywords. This search is NOT case sensitive.*

If the results do not include the course you're looking for, try searching for a different term.

- When the desired learning activity appears in the results, click the **Continue** button to select it.

Search Results: <span style="float: right;">Previous   Next</span>			
Results 1 - 6 of 6 for <b>HIPAA</b>			
Course Name	Course Description	Delivery Method	Availability
<a href="#">HIPAA Advanced RECERT (HPAA-0305)</a>	This catalog item is for HIPAA Advanced Recertification program.	Web (self-paced)	<span style="background-color: #ffff00; padding: 2px 10px;">Continue &gt;&gt;</span>
<a href="#">HIPAA Advanced Recertification (HPAA-PROG-0305)</a>	This Recertification is for workforce members who in the regular course of their work access, use, maintain, disclose or interact with PHI and who make independent decisions about their interactions with PHI or who supervise others.	Certification	<span style="border: 2px solid red; border-radius: 50%; padding: 2px 10px;">Continue &gt;&gt;</span>
<a href="#">HIPAA Awareness Recertification (HPAA-PROG-0105)</a>	This Recertification is for most workforce members who do NOT access, use, maintain, disclose or	Certification	<span style="background-color: #ffff00; padding: 2px 10px;">Continue &gt;&gt;</span>

- On the resulting detail page, click the **Add to Plan** button to add the activity to your employee's record as a Planned activity:

▼ **HIPAA Advanced Section 1** [Hide Section Requirements](#)

0 out of 1 needed activities have been completed for this section.

**To complete this section complete all activities.**

Section Activities		
<a href="#">HIPAA Advanced RECERT *</a>	Required	Historical Credit Not Allowed

\* You may request a waiver for this activity from your manager if you have fulfilled the requirements through an equivalent learning activity.

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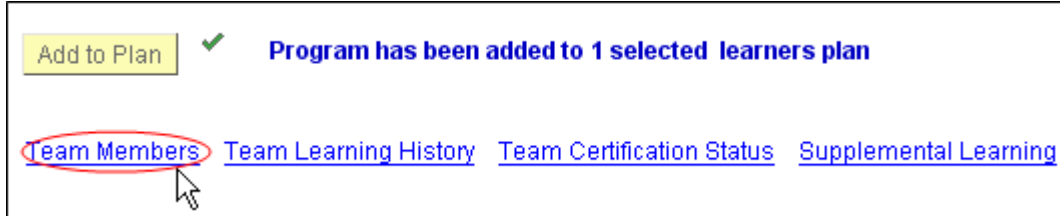
[Overview](#)    [Completion Rules](#)    [Objectives Met](#)    [Prerequisites](#)    [Notes and Attachments](#)

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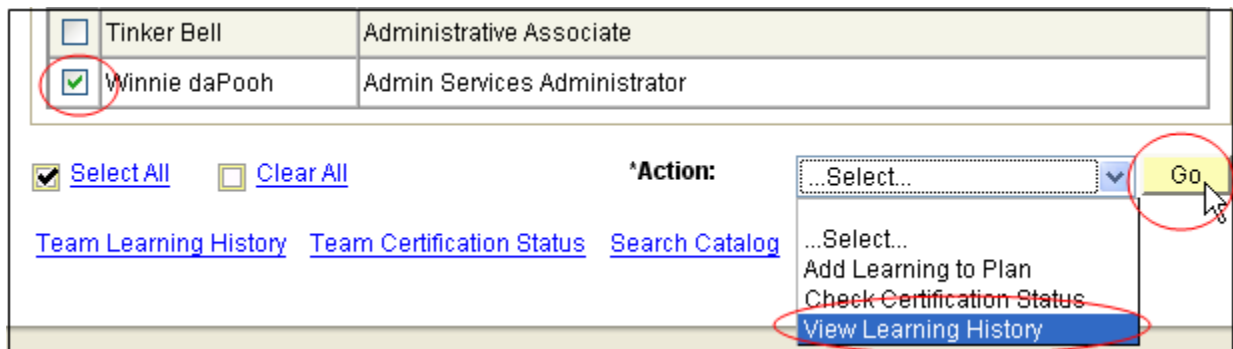
Add to Plan

**NOTE:** Courses for which enrollment is currently **Closed** will not have an “Add to Plan” button available and you will not be able to add them to an employee’s plan.

5. The system confirms that the training activity has been added to your employee’s plan. Click the **Team Members** link to return to your team list.



6. Click the employee’s **checkbox**, select **View Learning History**, and click **Go**:



7. The training activity has been added to the employee’s learning history with a status of “Planned”:

A screenshot of a table titled "Team Member Learning". At the top, there is a "For:" dropdown menu with "Winnie daPooh" selected and a yellow "Go" button. Below the table header, there are navigation options: "View All", "First", "1-8 of 8", and "Last". The table has five columns: "Name", "Title", "Type", "Status", and "Status Date". The first row shows "Winnie daPooh" with the title "HIPAA Advanced Recertification" (circled in red), a status of "Planned" (circled in red), and a status date of "09/03/09".

Name	Title	Type	Status	Status Date
Winnie daPooh	HIPAA Advanced Recertification		Planned	09/03/09

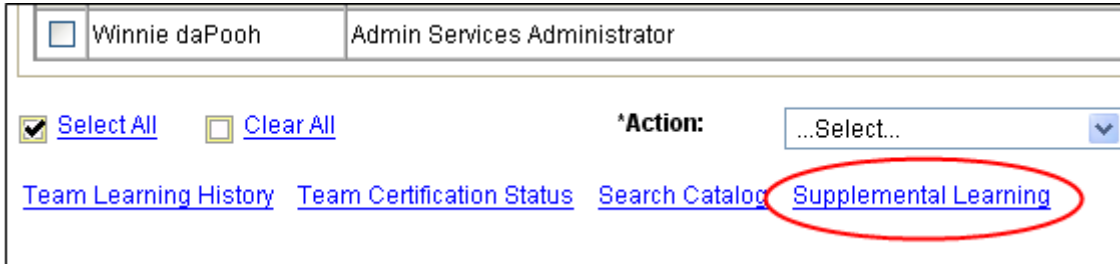
The employee will receive an e-mail message notifying him that you have added a training activity to his Learning plan.

**IMPORTANT:** Adding an activity/program to your employee’s learning record DOES NOT REGISTER HIM or HER for the activity/program. You are effectively adding a bookmark to the employee’s record as a recommendation of a training activity that you would like him/her to complete. Please be sure to let your employee know that s/he must go in to STARS and actively enroll in the recommended activity or program.

## To Add Supplemental (i.e., External) Learning Activities or Events:

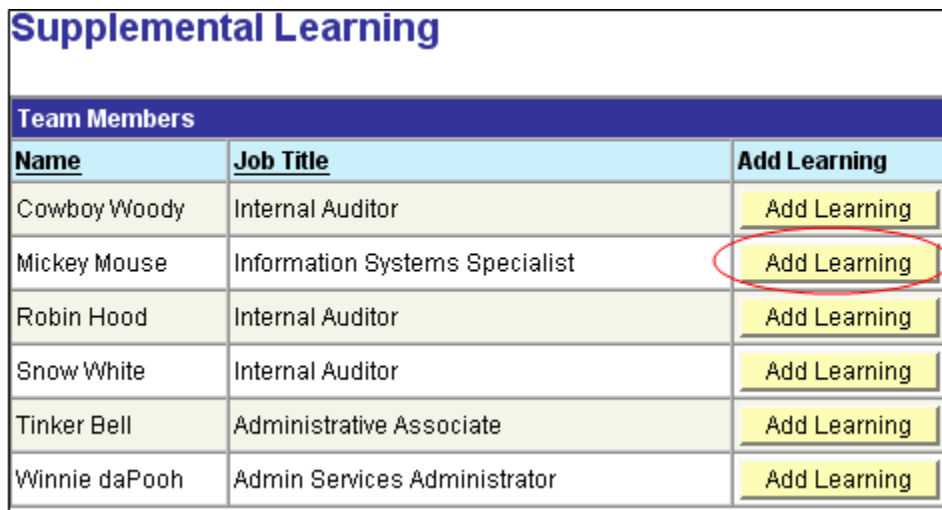
Managers may add learning activities not found in the STARS system to their employees' learning records (whether as recommended training or as after-the-fact notations) through the Supplemental Learning function.

1. On the Team Members page, click the **Supplemental Learning** link at the bottom.



The screenshot shows a user interface for managing team members. At the top, there is a search bar with a checkbox and the text "Winnie daPooh" and "Admin Services Administrator". Below this, there are two checkboxes: "Select All" (checked) and "Clear All" (unchecked). To the right, there is an "Action:" dropdown menu with "...Select..." and a downward arrow. At the bottom, there are four links: "Team Learning History", "Team Certification Status", "Search Catalog", and "Supplemental Learning". The "Supplemental Learning" link is circled in red.

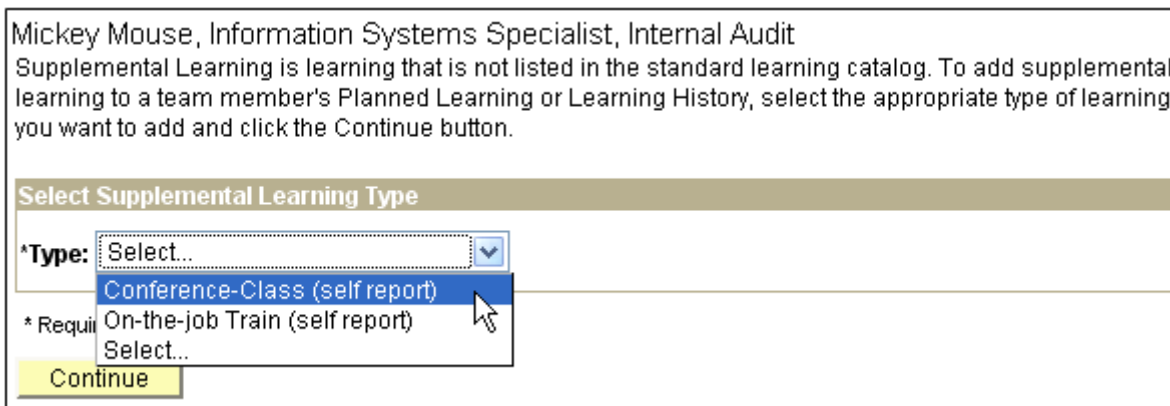
2. Click the **Add Learning** button in the row for the team member for whom you would like to add a learning activity.



The screenshot shows the "Supplemental Learning" page. It features a table with the following columns: "Name", "Job Title", and "Add Learning". The table lists several team members, each with an "Add Learning" button. The button for Mickey Mouse is circled in red.

Team Members		
Name	Job Title	Add Learning
Cowboy Woody	Internal Auditor	Add Learning
Mickey Mouse	Information Systems Specialist	Add Learning
Robin Hood	Internal Auditor	Add Learning
Snow White	Internal Auditor	Add Learning
Tinker Bell	Administrative Associate	Add Learning
Winnie daPooh	Admin Services Administrator	Add Learning

3. Choose the type of learning activity you'd like to add to the employee's learning plan or history from the dropdown menu and click **Continue**.



The screenshot shows the "Supplemental Learning" form. At the top, it displays the name and job title of the selected team member: "Mickey Mouse, Information Systems Specialist, Internal Audit". Below this, there is a paragraph of text explaining that supplemental learning is not listed in the standard learning catalog and that users should select the appropriate type of learning to add and click the Continue button. The form has a section titled "Select Supplemental Learning Type" with a dropdown menu for "Type:" and a "Continue" button. The dropdown menu is open, showing options: "Conference-Class (self report)", "On-the-job Train (self report)", and "Select...". A mouse cursor is pointing at the "Conference-Class (self report)" option.

4. Complete the information about the external training activity on the Supplemental Learning Details page and click **Save**. Be sure to provide information in all of the required fields.

### Supplemental Learning Details

<b>*Title:</b>	XAPM110 Converting Strategy into Action
<b>*Description:</b>	Stanford Center for Professional Development Advanced Project Management course. http://scpd.stanford.edu/
<b>*Status:</b>	Planned
<b>Type:</b>	Conference-Class (self report)
<b>*Start Date:</b>	11/04/2009
<b>*End Date:</b>	11/06/2009
<b>Institution:</b>	Stanford Univ, School of Engineering
<b>*Location:</b>	Terman Hall
<b>Study Hours:</b>	0.00
<b>Travel Hours:</b>	0.00
<b>Currency Code:</b>	USD
<b>Price:</b>	0.00
<b>Education Units:</b>	
<b>*Provided By:</b>	SCPD
<b>Professional Certification:</b>	

\* Required Field

**Save**

A confirmation page will display:

## Supplemental Learning

**You have successfully added/updated the following supplemental learning activity to the Learning History/Plan for Mickey Mouse:**

<b>Title:</b>	XAPM110 Converting Strategy into Action
<b>Status:</b>	Planned
<b>Start Date:</b>	11/04/2009

Return to the Team Members page to view Mickey Mouse's Learning History.

**Team Members**

- Click the **Team Members** link to return to the Team Members page, from which you may pull up the employee's Learning History and confirm that the supplemental learning activity is now included there.
- Click the employee's **checkbox**, select **View Learning History** from the dropdown menu, and click **Go**.

<input checked="" type="checkbox"/>	Mickey Mouse	Information Systems Specialist
<input type="checkbox"/>	Robin Hood	Internal Auditor
<input type="checkbox"/>	Snow White	Internal Auditor
<input type="checkbox"/>	Tinker Bell	Administrative Associate
<input type="checkbox"/>	Winnie daPooh	Admin Services Administrator

[Select All](#)     [Clear All](#)    \*Action: ...Select...

[Team Learning History](#)   [Team Certification Status](#)   [Search Catalog](#)

...Select...

...Select...

Add Learning to Plan

Check Certification Status

View Learning History

The newly added learning activity appears on the employee's Learning record with a status of "Planned".

Team Member Learning				
For: <span style="border: 1px solid black; padding: 2px;">Mickey Mouse</span> <input type="button" value="Go"/>				
View All   First 1-10 of 61 Last				
Name	Title	Type	Status	Status Date
Mickey Mouse	<a href="#">Traveling for Stanford</a>	Web (self-paced)	In-Progress	09/09/09
Mickey Mouse	<a href="#">Traveling for Stanford</a>	Web (self-paced)	In-Progress	08/03/09
Mickey Mouse	<a href="#">Cost Policy and Chart Of Accounts</a>	Web (self-paced)	Enrolled	11/10/07
Mickey Mouse	<a href="#">Cart Safety Training</a>	Web (self-paced)	Enrolled	05/29/09
Mickey Mouse	<a href="#">Working Safely with Pregnant and Neonatal Sheep Program</a>	Certification	Registered	08/24/09
Mickey Mouse	<a href="#">Back Care/Safe Lifting and Carrying</a>	Catalog Item	Planned	09/03/09
Mickey Mouse	<a href="#">XAPM110 Converting Strategy into Action</a>	Conference-Class (self report)	Planned	09/10/09

**IMPORTANT:** Adding Supplemental Learning to your employee's learning record DOES NOT REGISTER HIM or HER for the learning event. You are effectively adding a learning record as either a recommendation of a training activity, or as acknowledgment of training completed outside of STARS. NOTE that Supplemental Learning items will not appear on ReportMart1 Learning History reports.