



CHECKPOINT LEARNING INDEPENDENT PROFESSIONAL USER GUIDE



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Welcome to Checkpoint Learning For Independent Professionals

Thank you for choosing Checkpoint Learning (CPL), your one-stop resource for Continued Professional Education (CPE) needs and Continued Education (CE) Tracking for Independent Professionals.

Checkpoint Learning lets you:

- Track complicated rules and requirements for states in both accountancy and legal industries as well as various accountancy society regulators.
- Purchase and launch online learning to meet multiple regulator requirements.
- Maintain the CPE documentation required to renew state licenses and/or prove regulatory compliance.
- Complete online exams for more than 105 print-based self-study courses.
- Register for upcoming conferences on the newest and hottest accounting and tax topics.
- Keep abreast with up-to-the-minute news and updates affecting the accounting industry.
- Access CPE & Training Solutions digital magazines and newsletters.

Checkpoint Learning lets you register for instructor-led and online training on the topics affecting accountants today. This instructor-led training is from great providers such as AuditWatch, PPC, Gear Up, Bell Learning, Quickfinder, RIA, and MicroMash.

Checkpoint Learning - The Big Picture

Click any of the links below to view the relevant help topics

[Step 1 - Add Professional Designations \(CTEC, CFP, RTRP\)](#)



[Step 2 - Add CE Tracking](#)



Step 3 - Access Content

[Online/Download Courses](#)

[Webinars](#)

[Seminars and conferences](#)

[Online Grading Exams](#)



Step 4 - Adding [History/Attachments](#)



Step 5 - Using the Competency Module (Competency)

[Run Assessments](#)

[View Assessment Results](#)

[Solicit Manager Feedback](#)

Log In to Checkpoint Learning

The **Checkpoint Learning** page lets you access many resources even before you log in to the system. You can:

- Learn about the different solutions and products Thomson Reuters has to offer. View demos on how these products are used by customers like yourself.
- Use the Course Catalog to search for courses by topic, delivery format, brand, and location.
- Access Checkpoint Learning social media platforms, including the CPE & Training blog, CPL Facebook page, CPL Twitter feed, CPT & Training Twitter feed, and CPE & Training on YouTube.
- Access previous issues of CPE & Training Solutions digital magazines and newsletters.
- Access schedules of upcoming webinars and conferences.
- Access PDF versions of the CPE & Training Catalog and other current catalogs.
- View course lists for online courses, seminars, workshops, conferences, and self-study.

To log into Checkpoint Learning:

1. Go to <https://checkpointlearning.thomsonreuters.com>.

The **Checkpoint Learning** page appears. (See above for what you can do on this page.)

2. Locate the **Checkpoint Learning Login** section on the right side of the screen.
3. Complete the following fields:
 - **User Name** – Enter your Checkpoint Learning user name.
 - **Password** – Enter your Checkpoint Learning password.

Note: As an Independent Professional, you do not need to fill out the Organization ID field.

Note: The email address must be unique. Should the email address already be used, either contact Customer Support at 1.800.431.9025 or email checkpointlearning.cpecustomerservice@thomsonreuters.com to locate the account or provide another email address.

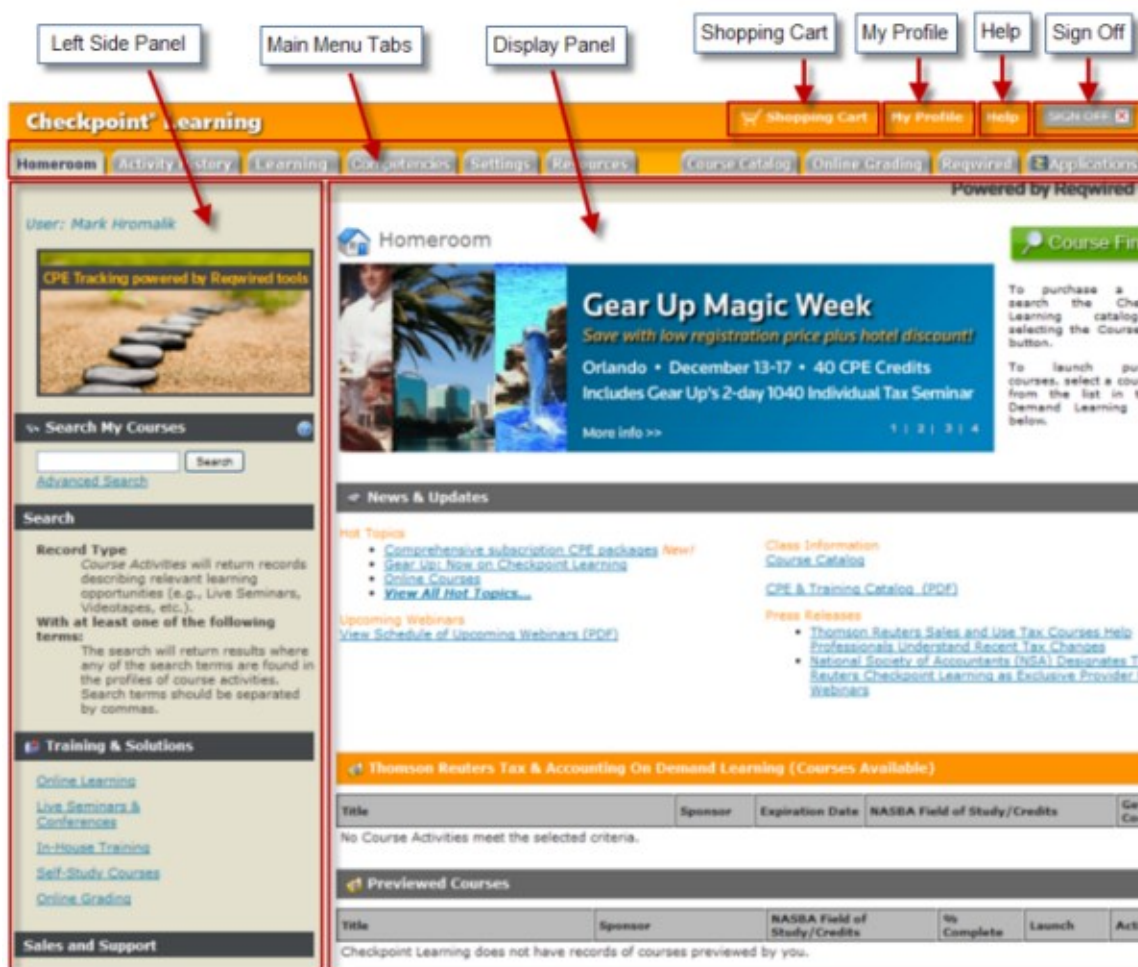
4. Click the **Go** button.

Checkpoint Learning opens with the **Homerom** page as the default.

Navigate Checkpoint Learning

When you log in to Checkpoint Learning, the **Homeroom** page is the default. The Checkpoint Learning interface has the following navigation conventions:



- The **Main Menu Tabs** are located along the top of the page. Clicking each tab displays the corresponding page.
- Each page has options displayed in the **Left Side Panel**.
- When you select an option, content is displayed in the **Display Panel**.









Element	Description
Homeroom Tab	View news, class information, and press releases. Search for live and online training solutions. View current registrations, online programs in-progress, on-demand courses, and the schedule of instructor-led events.
My CPE Tab (Optional)	View the training courses you have if you purchased a subscription package.

Element	Description
Status Reports Tab (Optional)	View regulators that have been added to your account and add regulators.
Activity History Tab	Perform functions related to course activities, certificates, and documents.
Learning Tab	View and launch on-demand and online grading courses. View a firm's Live Learning calendar (if applicable).
Competencies Tab	Access the Competency Model evaluation tool that defines the skills you need to perform a specific financial or accounting role in a job, organization, or profession.
Settings Tab	Edit the account profile/settings, change password, and view purchase history invoices.
Resources Tab	Access regulator information and rules, and access state and society web sites.
Course Catalog Tab	Search for Thomson Reuters courses by title, description, delivery format, media format, and vendor.
Online Grading Tab	Take paper based self study exams online and get real time testing results.
Required Tab	Access this feature when you do not have the compliance tracking component in Checkpoint Learning to track state-to-state regulations/requirements and to measure course completion.
Applications Tab	Access links to associated applications, such as Checkpoint, Thomson Reuters online resource for audit & accounting and tax research.
Shopping Cart	Purchase courses through your Checkpoint Learning account, view your order summary, and print or maintain an electronic log of your purchases.
My Profile	View your personal information. Access your account setting preferences and industries and any organizations to which your account is linked.
Help	View step-by-step procedures for using Checkpoint Learning features.
Sign Off	Exit Checkpoint Learning.

The following symbols and icons identify the actions you can perform on the Checkpoint Learning pages.

Symbol/Icon	Description
	Recognize that an asterisk symbol next to a field title means the field is required. If you do not see an asterisk, completing the field is optional.
	View a helpful popup description about the purpose of the field and what information should be entered.

Symbol/Icon	Description
	Edit the associated information.
	Delete the associated information.
	Scroll backward and forward through associated information.
	Print associated information.
	Launch a course you have downloaded.
	Open a calendar from which you can scroll to the month you want and select a date.

Homeroom

The **Homeroom** is the default page when you log in to Checkpoint Learning. At any other time, just click the **Homeroom** tab to go to your **Homeroom** page, where you will find the following features.

Feature	Description
News & Updates	Contains the latest topics, CPE and Training solutions, subscriptions, upcoming webinars, and new courses; and access to the Course Catalog search engine.
Search My Courses	Lets you perform a quick search for a course that matches your keywords. For a more detailed search, use the Course Catalog search engine.
CPE Status Reports	Contains the status reports for accounting regulators, compliance deadlines, and credits needed.
CLE Status Reports	Contains the status reports for legal regulators, compliance deadlines, and credits needed..
Training & Solutions	Contains access to: <ul style="list-style-type: none"> • Online learning courses from MicroMash, PASS Online, Webinar Learning Network, and Required. • Live seminars and conferences from Gear Up, Gear Up Workshops (formerly Bell Learning), PPC Conferences, and AuditWatch. • In-house training from Practitioners Monthly Video Digest and AuditWatch. • Self-study courses from Gear Up, PPC, Quickfinder, and RIA.
Course Finder	Lets you access the Course Catalog. This button is available only when the Firm Administrator has authorized the display of the Ad Banner.
My Registrations	Contains the courses for which you have registered.
In Progress	Contains the courses that you have started taking but have not yet completed.
Thomson Reuters On Demand Learning (Courses Available)	Contains the courses and exams that you have purchased. Note: If you have purchased a subscription package, your courses appear instead on the My CPE tab.
Previewed Courses	Contains the courses that you have previewed.
Live Learning Calendar	Contains the month-by-month schedule of instructor-led events. This feature appears only if you have purchased the University module.

News & Updates

The **News & Updates** section on your **Homerroom** page displays the following information:

- **Hot Topics** – Read up on the latest discussions affecting the accounting industry, access information about Checkpoint Learning features, and access and online courses. Click the View All Hot Topics link to see a complete list of topics.
- **Upcoming Webinars** – View the schedule of upcoming webinars on the newest and hottest topics.
- **Class Information** – Access the Thomson Reuters Course Catalog search engine to find the best, most popular, latest and greatest courses to meet your CPE needs. Also, view or print the latest Thomson Reuters CPE & Training Catalog.
- **Press Releases** – View the latest Thomson Reuters press releases regarding courses and training.

Course Catalog

Checkpoint Learning's Course Catalog lets you enter search criteria to customize your search for Thomson Reuters courses by topic, delivery format, CPE product brand, media format, and location.

To use the Course Catalog to search for courses:

1. Click the **Course Catalog** tab.

The **Advanced Search** page appears.

Note: You can use Advanced Search or select another search option from the left side panel. The other search options are See All New Courses, Search by Topic, Search by Delivery Format, Search by Brand, and Search by Location.

2. With **Advanced Search**, you can enter a keyword or phrase in the **Keywords** field, select the appropriate search criteria from the check boxes and drop-down lists, and then click the **Search** button.

Checkpoint Learning displays your search results.

3. From the search results, you can:
 - Export the search result list to MS Excel.
 - Sort the list by title or CPE credits.
 - Modify the search by narrowing the search to a specific course category and/or by adding or removing keywords.
 - Click a course title to view more details about the course.
 - Click a course's **Buy Now** button to purchase the course.
 - Click an **Buy Exam** button to purchase an exam.
 - Click a **PDF** button to view a PDF form or document.
 - Export the search result list to MS Excel.

Note: You can also access the Course Catalog by clicking the **Course Finder** button on the **Homeroom** page.

On Demand

On-Demand courses are interactive online self-study courses that can be taken anytime and anywhere you have access the Internet and your Checkpoint Learning account. On-Demand courses are supplied by MicroMash and PASS Online.

After you [purchase](#) an On-Demand course, you can [launch](#) it.

Once launched, an On-Demand course appears in the **In-Progress** section on your **Homeroom** page. You can start, stop, and scroll back through On-Demand courses as needed.

When you complete an On-Demand course, the electronic certificate appears in your list of attachments on the **Activity History** tab. The credits automatically transfer to your regulators, updating your status reports immediately.

Online Grading

The **Online Grading** tab provides access to self-study, print-based course exams. You will **not** have to mail in your answers and wait for a response. You can complete course examinations and receive real-time test results.

While taking an exam, the activity appears on the **Homeroom** tab in the **In Progress** section.

After passing the exam, the activity appears on the **Activity History** tab in the **Activity History** section.

Your certificate appears on the **Activity History** tab in the **Certificates & Documents** section.

To locate the PDF guidebook for an Online Grading exam:

1. Click the **Course Catalog** tab.

The **Advanced Search** page appears.

2. In the **Media Format** section, select the **Print-based with OG** check box.

3. Click the **Search** button.

The search results display the matching documents.

4. Click the PDF button for the guidebook you want.

The **File Download** window appears with buttons to either open or save the PDF document.

5. To save the PDF document, click the **Save** button.

The **Save As** window opens.

6. Browse to the location where you want to save the file.

7. Click the **Save** button.

Competency Model

The **Competency Model** is an evaluation tool that defines the skills that you need to perform a specific financial or accounting role in a job, organization, or profession. This tool helps you set learning goals, explore performance management issues, and plan your career. The Competency Model is organized around four career levels, five technical specialties, and thirteen non-technical categories—everything a professional needs to be proficient on the job.

Note: You must subscribe to the Competency Model to have it included in Checkpoint Learning.

To view competencies and mapped courses:

1. Click the **Competencies** tab.

The **Checkpoint Learning Competency Model** page appears.

2. Select the check boxes next to the levels, areas of specialty, and categories that apply to your search.


Note: You can customize your search to view the competencies for your current job or for a job you want in the future.

3. Select the **Show link to course maps** check box.

Note: If you do not select the **Show link to course maps** check box, you will not see the mapped courses associated with the selected competencies that are displayed in step 4.

4. Click the **Search** button.

The model displays the associated competencies and the courses mapped to each competency.

5. Click the expand icon  next to a level to view all competencies and the courses mapped to each competency.
6. Click a course title to view course details or to register for the course.
7. Click a mapped course to view the course profile.

To take a self-assessment of your skills:

1. Click the **Competencies** tab.


The **Checkpoint Learning Competency Model** page appears.

2. Select the check boxes next to the levels, areas of specialty, and categories for which you want to assess yourself.

Note: You can select one or all competencies. The competencies you select appear in your self-assessment.

3. Click the **Search** button.

The model displays the competencies for the selected levels.

4. Click the expand icon  next to a level to view all associated competencies.
5. Select the check boxes for the competencies you would like to make part of your self-assessment.
6. Click the **Start Assessment** button at the bottom of the page.

Your customized self-assessment appears in the display panel.

7. For each competency, click the rating scale drop-down list and select the proficiency rating that best applies to you.

Note: The ratings you can select are 1 - Developing, 2 - Working, 3 - Practicing, 4 - Advanced, 5 - Expert. You can click the competency name to display the proficiency rating descriptions. Click the competency name to display the proficiency rating descriptions.

8. Click the **Save and view results** button.

The model displays your self-assessment results.

9. To print your self-assessment, click the **Print** button at the top of the assessment.
10. To update your self ratings, click **Update your results** at the bottom of the page.

Note: You can update your results before you invite your manager or coach to provide feedback. Once they are invited, this option disappears.

To add on-the-job activities:

1. From your self-assessment results, click the **Add On The Job Activity** link beneath a competency to document your job activities that build proficiency for that competency.
2. When the pop-up window appears, enter your comments in the **Comment** field.
3. Enter the appropriate date in the **Complete By Date** field, or click the Calendar icon to select a date.
4. Click the **Save** button to close the window and return to your self-assessment.

To invite your manager/coach to provide feedback:

1. From your self-assessment results, click the **Invite Manager/Coach** button at the bottom of the page.
2. Enter your manager's email address in the provided field or click the **Search** button to search for the appropriate email address.

Note: Only managers and coaches with active user accounts and access to the Competency Model can provide feedback on an assessment.

3. Select the manager you want, and then click the **Invite** button.

An automatically generated invitation email is sent to your manager/coach providing instructions on how to log in and provide feedback.

4. To view your manager's feedback when it is available, click **My Assessment Results** on the left side panel.

Search My Courses Feature

On the **Homeroom** page, you can use the **Search My Courses** feature to perform a quick search for a course activity that matches your search criteria.

Note: This feature looks through the in-house programs of a firm. If the firm does not enter search words for their in-house courses, then no search results appear.

To use the Search My Courses feature:

1. Click the **Homeroom** tab.

The **Homeroom** page appears.

2. Locate the **Search My Courses** section on the left side panel.
3. Enter a word in the blank field.

Note: Multiple words may be used in a search by separating the words with a comma.

4. Select the appropriate sponsor from the list below the blank field.
5. Click the **Search** button.

The **Advanced Search Results of My Courses** page appears with a list of matching courses.

Note: You can click the course name to view details about the course activity, including prerequisites and learning objectives.

6. Select the format (**Online** or **Download**) for the course activity you want.
7. Depending on the format you select, click either the **Launch** or **Download** button.
 - If you click the **Launch** button, the course opens.
 - If you click the **Download** button, the **Course Profile** page appears. Click the **Download** button and follow the prompts to download the course.

Note: Note that the **Advanced Search** link of the **Search My Courses** feature is still in development.

Shopping Cart

To access the Shopping Cart, click the **Shopping Cart** link at the top of any Checkpoint Learning page. You also access the Shopping Cart when you click the **Buy Now** button next to a course you want to buy.

The Shopping Cart lets you:

- Purchase courses through your Checkpoint Learning account.
- Control the billing and shipping of your purchased materials.
- View your order summary.
- Print a receipt and maintain an electronic log of items you have purchased.

Checkpoint

You can [log in](#) to your Checkpoint account from your Checkpoint Learning account. The Checkpoint research application offers you fast, effective ways to find answers to your research questions.

Here are many of the activities you can do with Checkpoint:

- Get the guidance you need from RIA, PPC, EBIA, IBFD, and WG&L experts.
- Search the way you want with customized search options.
- See as much or as little as you need with customized libraries and links to primary source materials and analysis.
- Connect with tax software like ONESource, Ultra Tax CS, and e-Form RS.
- Cut through your workload with time-saving Checkpoint Tools.
- Keep up-to-speed with alerts about news that affects you.

Log In to Checkpoint From Checkpoint Learning

Checkpoint Learning allows you to launch your Checkpoint account from your Checkpoint Learning account.

Before you can log in to Checkpoint for the first time, you must establish your "single sign on" link between Checkpoint Learning and Checkpoint.

To establish single sign on link:

1. Click the **Settings** tab.

The **My Profile** page appears.

2. Click **Single Sign On** from **Account Profile** section on the left side panel.

The **Single Sign On** page appears.

3. Locate the Checkpoint application and click the **Link** link in the **Status** column.

Checkpoint Learning links to Checkpoint and the **Checkpoint Login** page appears.

Note: Now you are set up and ready to log in to Checkpoint. There is no need to repeat this procedure unless you are having connection problems and need to reset the link.

To log in to Checkpoint from Checkpoint Learning:

1. Click the **Applications** tab.

The **Applications** page appears.

2. Click the **Checkpoint** link on the left side panel.

The **Checkpoint Login** page appears in a new window.

3. Complete the following fields:

- **User Name** – Enter your Checkpoint user name.
- **Password** – Enter your Checkpoint password.

4. Click the **Login** button.

Change My Checkpoint Learning Password

Checkpoint Learning passwords must be a minimum of six characters and are not case sensitive.

To change your Checkpoint Learning password:

1. Click the **Settings** tab.
The **My Profile** page appears.
2. Click **Change Password** from the **Account Profile** section on the left side panel.
The **Change Password** page appears.
3. Complete the following fields:
 - **Current Password** – Enter your current password.
 - **New Password** – Enter the password you want to use.
 - **Confirm Password** – Reenter the password you want to use.
4. Click **Submit**.

Recover My Checkpoint Learning User Name or Password

If you have forgotten your Checkpoint Learning user name or password and you created your Checkpoint Learning Account using the **New User Registration** link, perform the following procedures on the **Checkpoint Learning Login** page. All other customers can contact Customer Support at 1-800-431-9025.

To request your password:

1. Go to <https://checkpointlearning.thomsonreuters.com>.
2. On the **Checkpoint Learning Login** page, click the **Forgot Login?** link.
3. Complete the following fields in the **Forgot Your Password?** section:
 - **Username** – Enter your Checkpoint Learning user name.
 - **Email** – Enter your email address.
4. Click the **Get Password** button.
You will receive an email with a temporary password.

To request your username:

1. Go to <https://checkpointlearning.thomsonreuters.com>.
2. On the **Checkpoint Learning Login** page, click the **Forgot Login?** link.
3. In the **Forgot Your Username?** section, enter your email address.
4. Click the **Get Password** button.
You will receive an email with a temporary password.

Edit User Profile Information

If you are no longer with a firm and wish to use your Checkpoint Learning Account, you will be prompted for your User Profile information.

To enter your User Profile information:

1. Login to your Checkpoint Learning account.
The **Update User Profile** page appears.
2. Complete all of the required fields.
3. Click **Save**.

The **My Profile** page is displayed with updated user information.

Add a Professional Designation

Checkpoint Learning enables you to enter the following designations to your professional account:

- CTEC – (California Tax Education Council)
- CFP – (Certified Financial Planner)
- RTRP – (IRS Registered Tax Return Preparer)
- EA – (IRS Enrolled Agents)

By adding these professional designations to your account, Checkpoint Learning will report automatically which Checkpoint Learning (MicroMash, PASS Online, PPC, Gear Up, PPC) programs you complete that qualify towards meeting the professional designation requirements. It is important that you enter your designation information BEFORE you complete the course.

Note: Checkpoint Learning cannot automatically report course completion information to the particular jurisdictions for courses you completed PRIOR to your entering the professional designation information. To have Checkpoint Learning courses you completed previously reported to the CTEC, CFP, RTRP, or EA regulators, please contact Customer Support at 1-800-431-9025.

To add a professional designation:

1. Click the **Settings** tab. The **My Profile** page appears.
2. Click **Edit My Membership** information from the **Personal Profile Settings** menu on the left side panel. The **Update Membership Details** page appears.
3. Select your **Professional Designation** from the drop down menu.
4. Enter the corresponding designation ID in the **ID Number** field.

Note:

1. If you are an IRS Registered Tax Return Preparer (RTRP) or an Enrolled Agent (EA), enter the PTIN. The PTIN must be a capital "P" followed by eight (8) numbers. Do not enter a PTIN designation if you are an attorney, certified public, accountant, or certain other individual who does not prepare Form 1040 series returns.

2. If you are a Certified Financial Planner (CFP), enter the CFP ID. The CFP ID is the certificant / CFP Board ID number issued with the professional's initial certification from CFP.

3. If you are a California Registered Tax Preparer (CRTP), enter the CTEC ID number. The CTEC ID number is a 4- to 6-digit number that may or may not be preceded by an "A".

5. Click **Add**.

Note: You may enter more than one designation. All professional designations must be entered accurately, otherwise Checkpoint Learning will be unable to report your applicable completion records to the respective Boards named above.

Edit Pilot Test Information

Thomson Reuters offers free continuing education to licensed professionals in exchange for feedback on not yet published courses. In order to provide feedback on these courses, complete the Pilot Test information which will indicate which programs you feel qualified to pilot test.

To edit your Pilot Test information:

1. Login to your Checkpoint Learning account and click **My Profile**.
2. Click **Edit My Pilot Test Information** under **Personal Profile Settings**.
The **Update Pilot Test Information** page appears.
3. Complete all of the required fields.
4. Click **Save**.

The **My Profile** page is displayed with updated pilot test information.

Edit My Settings

You can edit your personal profile information in Checkpoint Learning.

To edit your settings:

1. Click the **Settings** tab.

The **My Profile** page appears.

2. Click **Edit Preferences** from the **Personal Profile Settings** menu on the left side panel.

The **Update User Profile** page appears.

3. Enter any or all of the following information:

- **Update User Profile** – Enter your name, company name, department, and customer number.
- **Address** – Enter your address and time zone information.
- **Email** – Enter your email type, email address information.

- **Note:** The email address must be unique. Should the email address already be used, either contact Customer Support at 1.800.431.9025 or email **checkpointlearning.cpecustomerservice@thomsonreuters.com** to locate the account or provide another email address.

- **Phone** – Enter your phone contact information.

4. After you enter profile, address, email, or phone information, click the **Add** button next to each section you updated.

5. Click the **Save** button.

Add Regulator Status Reports

You can add regulators to track continuing education (CE) requirements for various jurisdictions. Before you add regulators to an account, you must purchase the tracking component. Once purchased, you will have access to track both legal and accountancy jurisdictions. The requirements for each jurisdiction and the applicable credits you have earned through completing Thomson Reuters courses or manual entry will display in the regulator status report.

To add regulator status reports to your account:

1. Click the **Status Reports** tab.

The **Status Report** page appears.

2. Click **Manage Regulators** (next to the appropriate industry) from the **Status Reports Menu** section on the left side panel.

The **Add/Remove Regulators** page appears.

3. Select the regulator you want from the **Regulator** drop-down list.

4. Click the **Add** button.

The **Status Report Questionnaire** page appears.

5. Complete all Status Report Questionnaire questions and click **Submit** after each answer.

When you finish the questionnaire, the selected regulator's Status Report appears.

View My Status Reports

Checkpoint Learning allows you to view your compliance status for accountancy and legal jurisdictions.

To view my status report:

1. Click the **Status Reports** tab.
The **Status Report Manager** page appears.
2. Select either of the following:
 - Click the **Compliance Deadline** period for the appropriate regulator.
 - Click the regulator name. The **Status Report Folder** page appears. Click the **Compliance Deadline** period.

The **Status Report** page appears.

Navigating the Status Report

Credits Earned: Summary of the credits earned, the CPE requirement and deficits.

Activity Information: Displays the date, title, sponsor, format, type, sponsor number, and credits.

Regulator Rule Highlights

Rule Summary: Launches regulator details and requirements.

Status Report

Compliance Period

Rule Summary

Status Report Profile

PCAOB
Industry: Accountancy
Effective Date: 02/04/2005

Status Summary: 01/01/2008 - 12/31/2010

	Total	Accounting / Auditing	FY2010 Total	FY2010 Accounting / Auditing	FY2009 Total	FY2009 Accounting / Auditing	FY2008 Total	FY2008 Accounting / Auditing
Credits Earned:	437.0	216.0	351.0	156.0	48.0	36.0	38.0	24.0
CPE Requirement:	120.0	0.0	20.0	0.0	20.0	0.0	20.0	0.0
Credit Deficit:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

FY2010: 01/01/2010 - 12/31/2010

Date	Course / Activity	Sponsor	Format	Type	Sponsor #	AA	Tx	MG	CS	SK	PD	Eth
02/12/2010	Fraud	White & Black, LLP	Live Seminar	Group - Live	12345	2.0	0.0	0.0	0.0	0.0	0.0	0.0
02/12/2010	Fraud	White & Black, LLP	Live Seminar	Group - Live	12345	2.0	0.0	0.0	0.0	0.0	0.0	0.0
02/12/2010	Fraud	White & Black, LLP	Live Seminar	Group - Live	12345	2.0	0.0	0.0	0.0	0.0	0.0	0.0
02/12/2010	Fraud	White & Black, LLP	Live Seminar	Group - Live	12345	2.0	0.0	0.0	0.0	0.0	0.0	0.0
02/16/2010	Non-Profit Organizations and new Tax Changes	Johnson & Johnson	Live Seminar	Group - Live	34555	4.0	0.0	0.0	0.0	0.0	0.0	0.0
02/18/2010	Income Taxation for Managers	Johnson & Johnson	Live Seminar	Group - Live	45444	0.0	10.0	0.0	0.0	0.0	0.0	0.0
02/26/2010	Employee Benefit	Johnson & Johnson	Live Seminar	Group - Live	987456	8.0	0.0	0.0	0.0	0.0	0.0	0.0

Rule Highlights

Professional Proficiency Credit:
The Revised Government Auditing Standards (June 2003) state that CPE earned towards the CPE requirement must 'directly enhance the auditor's professional proficiency to perform audits and/or attestation engagements.' [Formerly, any CPE which contributed to 'the auditor's professional proficiency' would qualify for credit.]

Credit Caps:

- No more than 20.0 credits can be earned through publication of books or articles. [Remaining: 20.0]
- No more than 40.0 credits can be earned through teaching CPE courses. [Remaining: 40.0]

Add Activities to My Account

In Checkpoint Learning, you can add continuing education (CE) activities to your account.

To add activities to my account:

1. Click the **Activity History** tab.

The **Activity History** page appears.

2. Click **Add Activity** from the **Activity History Menu** on the left side panel.

The **Add Activity** page appears.

3. Complete the following fields in the **Activity Details** section:

- **Title** – Enter the title of the class.
- **Sponsor** – Enter the name of the class sponsor.
- **Format** – Select the format type from the drop-down list.
- **Completion Date** – Enter the completion date (format MM/DD/YYYY) or click the **Calendar** icon to select the date.
- **Notes** – Enter notes or additional information in the text box.

4. In the **Accrediting Regulators** section, use the arrows to move regulators from the **Not Selected** list to the **Selected** list.

Note: You can also double-click the regulators to move them. Press and hold the Ctrl key to select more than one regulator. Click the single arrow icon to move individual regulators. Click the double arrow icon to move all regulators.

5. Select the optional **Assist me with credit distribution** check box if you want Checkpoint Learning to determine which category credits will appear, and then click the **Next** button.

- If you did not select the **Assist me with credit distribution** check box, skip directly to step 7.
- If you selected the **Assist me with credit distribution** check box, the **Credit Distribution Assistant** page appears. Continue to step 6.

6. Complete the following fields:

- Enter the participation time in minutes in the appropriate Field of Study category.
- Select Yes or No to indicate whether the activity is sponsored by NASBA and meets NASBA Registry Standards of accreditation.
- Enter the sponsor's number (such as NASBA registry #, QAS #) if applicable.

- Select whether the activity was provided by a Third-party Commercial Provider, In-house, AICPA/State Society, or University/College.
 - Select whether the activity includes state-specific ethics/rules content, and the participants are resident-licensees of the state to which the ethics/rules content is applicable.
 - Select whether the activity includes content properly classified as "Auditing" but which by its nature directly relates to government auditing and/or the government environment.
 - Enter the location of the activity.
7. Scroll to the bottom of the **Credit Distribution Assistant** page, and click **Next**.

The **Add Activity** page appears.

Note: If you did not select the **Assist me with credit distribution** check box in step 5 and skipped to this step, you must manually enter the category/credit amount on the **Add Activities** page.

8. Review and edit the **Attributes**, **Category/Credits**, and **Properties** for each regulator as necessary.

Note: If the certificate of completion documents the state-specific sponsor number, locate the regulator and enter the sponsor number in the regulator's sponsor field.

9. Click the **Submit** button.

The **Activity Profile** page appears.

Upload Documents to My Account

You can add documents, such as certificates of completion or copies of licenses, to your Checkpoint Learning account. The only document types you can upload are PDF, MS Word, TXT, and GIF.

To upload document to your account:

1. Click the **Activity History** tab.

The **Activity History** page appears.

2. Click **Certificates & Documents** from the **Activity History Menu** on the left side panel.

The **Course Completion Certificates & Learning Documents** page appears.

3. Click **Add Document** from the **Activity History Menu**.

The **Add Document** page appears.

4. Enter the document name in the **Document Name** field (example: Audit 101 July 7 2009).

5. Click the **Browse** button.

The **Choose File to Upload** window appears.



6. Locate and select the document you want to upload.

7. Click the **Open** button.

The selected file appears in the **File** field.

8. Click the **Submit** button.

The document name appears under the Learning Documents section on the **Course Completion Certificates & Learning Documents** page.

Note: You can click the  icon to edit the document name or the  icon to delete the document.

Attach a Document to an Activity

You must have read/write access to attach a document to an activity. Contact your Firm Administrator if you do not have read/write access. Your Firm may have a policy regarding adding activities to your account. Check with your Firm Administrator for details.

Prior to attaching a document to an activity, the activity and document must be entered in your account.

To attach a document to an activity:

1. Click the **Activity History** tab.

The **Activity History** page appears.

2. Click **Activity Profile** from the **Activity History Menu** on the left side panel.

The **Activity Profile** page appears.

3. Click **Attach Documents** on the left side panel.

The **Attach Documents** page appears.

4. Select the check box of the document name you want to attach.

5. Click the **Submit** button.

The attached document is displayed at the bottom of the **Activity Profile** page.

Link My Checkpoint Learning Account to a Firm

If you are joining a firm that uses Checkpoint Learning, you can link your current Checkpoint Learning account to the firm's Checkpoint Learning organization, and transfer ownership of your account to the firm. To link to a firm, do any or all of the following:

- Call 1-800-431-9025
- Click [here](#) to access the customer help center, then click **Create a Case** from the **Contact Us** section on the right hand side.
- Email checkpointlearning.productsupport@Thomsonreuters.com and provide the firm name.

Locate and Print Thomson Reuters-Issued Certificates

Thomson Reuters-issued certificates for course completion are stored in the **Activity History** tab.

To access Thomson Reuters-issued certificates:

1. Click the **Activity History** tab.
The **Activity History** page appears.
2. Click **Certificates & Documents** from the **Activity History Menu** on the left side panel.
The **Course Completion Certificates and Learning Documents** page appears.
3. Click the certificate you want to view from the **Firm and Thomson Reuters Certificates** section.
The selected certificate appears.
4. Optionally, you can click the **Print Certificate** button in the left side panel to print the certificate.

Renew My License Tracking Subscription

To track regulators, you must purchase and add the accounting industry to your account profile.

Call 1.800.431.9025 for more information.

Link your Checkpoint and Checkpoint Learning Accounts

Click [here](#) for the steps to link your Checkpoint Learning account to your Checkpoint research account.

Use the Course Catalog to Search for Courses

The Course Catalog is the search engine for locating Thomson Reuters courses to assign to an employee. The Course Catalog allows search criteria to be entered to customize a search for courses by topic, delivery format, CPE product brand, field of study, or location.

Access the Course Catalog by clicking **Course Catalog** .

Note: The Course Finder button is available only when the Firm Administrator has authorized the **Course Catalog**.

To use the Course Catalog to search for courses, do the following:

1. Click **Course Catalog**.

The Course Catalog's **Advanced Search** page appears.

Note: Use Advanced Search or select another search option from the left side panel. The other search options are See All New Courses, Search by Topic, Search by Delivery Format, Search by Brand, and Search by Location.

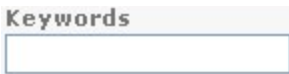
2. Using **Advanced Search**, enter a keyword or phrase in the **Keywords** field, select the appropriate search criteria from the check boxes and drop-down lists, and then click the **Search** button.







Checkpoint Learning displays the search results.

3. From the search results, the following tasks may be performed:
 - Export the search result list to MS Excel.
 - Sort the list by title or CPE credits.
 - Modify the search by narrowing the search to a specific course category and/or by adding or removing keywords.
 - Click a course title to view more details about the course.
 - Click a course's **Buy Now** button to purchase the course.
 - Click an **Buy Exam** button to purchase an exam.
 - Click a **PDF** button to view a PDF form or document.

4. On the left side panel other search options can be accessed, as described in the following table:

Navigating the Course Catalog

Element	Function
	Search for CPE solutions by entering a keyword in the search field.

Element	Function
 Course Catalog	Perform advanced search, view all new courses, search by topic, search by delivery format, search by brand, and search by location.
 About Our Products	Access overviews of new products, self-directed learning, instructor-led learning, and group solutions.
 Learning Management	Access overviews of learning management products, CPE tracking and compliance, and professional development.
 Tailored Solutions	Search for tailored solutions for corporate and industry, government, firms, individuals, registered tax preparers, and certified financial professionals.
 CPE Products by Brand	Access specific product brands, including AuditWatch, Checkpoint Learning, Gear Up, MicroMash, PASS Online, PPC, PPC and AuditWatch Conferences, Quickfinder, Required, RIA, and Webinar Learning Network.
 Follow Us On	Access CPE & Training blog, Checkpoint Learning Facebook Page, CPE & Training Facebook page, Checkpoint Learning Twitter Feed, CPE & Training Twitter Feed, and CPE & Training on You Tube.

Purchase a DVD/CD

Checkpoint Learning's Course Catalog feature provides access to courses in the DVD/CD format.

To purchase DVD/CDs:

1. Click **Course Catalog** .

The **Advanced Search** page appears.

2. Enter search criteria according to :

- **Keywords**
- **Credits**
- **Topic**
- **Delivery Format**
- **Media Format**
- **Specialized Designations**

3. Click **Search**.

The search result displays the exam or exams that match your search criteria.

4. Select the check box for the exam you want to purchase.
5. Click the **Buy Now** button at the bottom of the page.

The **Shopping Cart** page appears.

Note: If you have not yet entered a shipping address for your Checkpoint Learning account, you will be prompted to complete the shipping address form. Complete the form and click **Continue**.

6. Review your order and click the **Continue** button.

The **Billing & Shipping** page appears.

7. In the **Billing Information** section, enter the following information:

- **Payment** – Select an option from the drop-down list.
- **First Name** – Confirm or type your first name.
- **Last Name** – Confirm or type your last name.
- **Card Number** – Type your credit card number in the field.
- **Expiration** – Select the credit card expiration date from the month and year drop-down lists.

- **My Bill To address matches the billing address on my credit card** – Select this check box if true.
- **Address 1** – Type the billing address in the field.
- **City** – Type the billing city in the field.
- **State** – Select the billing state from the drop-down list.
- **Zip Code** – Type the billing zip code in the field.

8. Click the **Continue** button.

The **Order Summary** page appears.

9. Click the **Complete Checkout** button.

The **Your Receipt** page appears.

The DVD will be mailed to your Shipping Address once the payment is processed. Once you receive the DVD/CD, you can [view the details](#) of the course you purchased.

Access a DVD/CD

To access a DVD/CD, do the following:

1. Open the disk drive on your computer.
2. Place the DVD/CD labeled **Vol1** into your computer's disk drive and close the disk drive.
3. The installation wizard should automatically launch with instructions for installing the offline player. If the installation wizard does not automatically launch, you must:
 - Locate and open the **My Computer** icon on your desktop.
 - Locate the drive location where the DVD/CD is inserted. This is normally the (D:) drive.
 - Open the contents of the drive containing the DVD/CD.
 - Double-click the file titled **Startup.exe**. This will launch the installation wizard.
4. When the installation wizard has completed the installation of the offline player, the course data will begin downloading automatically. You will be notified when all course data from the DVD/CD has been downloaded successfully.
 - If the course data spans multiple DVD/CDs, you will be instructed to remove the current DVD/CD from the disk drive and insert the next DVD/CD.
 - Course download will continue automatically after each additional DVD/CD is inserted.
5. Once you are notified that all course content has been successfully downloaded, select **Launch Player**. You will be prompted to close the current window you are viewing so the player can launch. Click **OK**. The player will launch and will provide you with the option to select the **Launch** icon to launch the course. After selecting the **Launch** icon, you will be asked to provide the following data:
 - The unlock code key (found on the DVD/CD label and the back of the DVD/CD sleeve).
6. Select **Activate** and the course will launch.

Note: The unlock code key must be entered exactly as it appears with no extra spaces.

- Your first and last name as it appears on the DVD/CD label.

Note: Once all content from the DVD/CD is downloaded, please **Activate** your course(s) before the expiration date shown in the offline player. Until activated, downloaded courses have a 15-day expiration date. Once activated, courses will be available for the full amount of time for your completion. You can activate a downloaded course by following Steps 5 and 6 above.

Note: If you have purchased a subscription package, your courses appear instead on **My CPE**. If you have any questions, please call 1-800-431-9025

Purchase On-Demand Courses

This topic refers to all Thomson Reuters courses, including On-Demand courses supplied by MicroMash and PASS Online. Prices for Thomson Reuters courses vary by topic and CPE credit.

You can use the **Course Catalog** tab to search for the course you want to purchase.

To purchase a course:

1. Click the **Course Catalog** tab.

The Course Catalog's **Advanced Search** page appears.

Note: You can also click the **Course Finder** button on the **Homeroom** page to access the Course Catalog.

2. Enter your search criteria and click the **Search** button.

The search results appear based on your search criteria.

3. Click the **Buy Now** button next to the course you want to purchase.

If you are an existing customer, the **Shopping Cart** page appears.

Note: If you have not entered a shipping address for your Checkpoint Learning account, you will be prompted to complete the shipping address form. Complete the form and click **Continue**.

4. On the **Shopping Cart** page, review your order and click the **Continue** button.

The **Billing & Shipping** page appears.

5. In the **Billing Information** section, enter the following information:

- **Payment** – Select an option from the drop-down list.
- **First Name** – Confirm or type your first name.
- **Last Name** – Confirm or type your last name.
- **Card Number** – Type your credit card number in the field.
- **Expiration** – Select the credit card expiration date from the month and year drop-down lists.
- **My Bill To address matches the billing address on my credit card** – Select this check box if true.
- **Address 1** – Type the billing address in the field.
- **City** – Type the billing city in the field.
- **State** – Select the billing state from the drop-down list.
- **Zip Code** – Type the billing zip code in the field.

6. Click the **Continue** button.

The **Order Summary** page appears.

7. Click the **Complete Checkout** button.

The **Your Receipt** page appears.

8. When you are ready, you can [launch](#) the purchased course.

Note: If you have not purchased a subscription package, your courses appear in the **Thomson Reuters On Demand Learning (Courses Available)** section on the **Learning** page and **Homeroom** page. However, if you have purchased a subscription package, your courses appear instead on the **My CPE** tab.

Find Purchased On-Demand Courses

After you [purchase](#) an On-Demand course, the course appears in the **Thomson Reuters On Demand Learning (Courses Available)** section on the **Learning** page and **Homeroom** page.

Note: If you purchase a subscription package, On-Demand courses appear on the **My CPE** tab.

Premier, Professional, and Compliance Package Users

If you purchase the Premier, Professional, and Compliance package, the **My CPE** tab appears in your account. This tab lists all the training courses you have purchased (up to approximately 500 in various formats, topics, and fields of study). The package includes the following continuing education formats:

- **Online Self Study (Online Method)** – This format is an online course that you launch from the **My CPE** tab. You must disable your pop-up blockers to enable the program to open in a new window and must stay connected to the Internet during the time you are taking the course. Once the course is open, you can navigate around and then complete the study questions at the end of each chapter and the exam at the end of the course. You can stop and exit the course and your account and then come back where you left off.
- **Online Self Study (Download Method)** – This is the same course as the Online Self Study (Online Method), but in this case, you only connect twice for the course, once to download the course off the Internet to your computer, and the second time after you finish the course. Then you need to connect to the Internet, log in to your Checkpoint Learning account and launch the course a final time so the account can obtain the results.
- **Print-Based with OG (Online Grading)** – The online exam can be found on the back of the Complimentary Guides located in the **Course Catalog** tab of your account. When you click the **Course Catalog** tab, in the **Media Format** section, select the **Print Based with OG** option, and then click the **Search** button. The list of complimentary PDFs appears. Click the PDF button to open the guide you want. At the back of each PDF is the exam. You can just read the content if you want. But if you want CPE for reading the content, you have to take the exam. The exam is included in the package, but can also be bought by other learners in the **Course Catalog** tab.
- **Webinars** – You must register for the date and time that works for you. The programs are on the **My CPE** tab. Once you select the date and time and click the **Register** button, a dialog box opens with a message that says an email will be sent to you with the webinar details. The email can be sent up to 48 hours prior to the event. Any registrations done within the 48 hours prior to an event is considered last minute and registration should be confirmed by calling 1.800.431.9025.

Access Purchased Courses

Once an On-Demand course or Online Grading exam is purchased the course is displayed in the **Thomson Reuters On-Demand Learning (Courses Available)** section on the **Learning** page and **Homeroom** page. However, if a subscription package is purchased, the On-Demand courses are displayed on **My CPE**.

Purchased live events (webinars, webcasts, seminars and conferences) are displayed on the Live Learning calendar on the **Homeroom** page.

Once you have purchased any Seminars and Conferences, they are displayed on the **My CPE** page.

Note: On the **My CPE** page, you can search for **Webinars/ webcasts** and **Seminars/Conferences** by checking respective options. However, the **Seminars/Conferences** option will be grayed out if your package does not provide access to Seminars and Conferences or if you have not purchased any Seminar/Conferences.

Premier, Professional, and Compliance Package Users

When the Premier, Professional or Compliance packages are purchased, **My CPE** is displayed in the respective account. This lists all the training courses that have been purchased (approximately 500 in various formats, topics, and fields of study). The package includes the following continuing education formats:

- Online Self Study (Online Method)
- Online Self Study (Download Method)
- Print-Based with OG (Online Grading)
- Webinars

All the purchased programs are displayed in **My CPE**. Search for specific courses by topic, term, or format. You can also sort the available list of courses on the My CPE page by Title, CPE date or event date.

Note: If a purchased course has been retired, Checkpoint Learning displays notifications of suggested replacements for the previously entitled but subsequently retired course.

For online courses, select the format (download or online), and then click the **Launch** button.

Note: Be sure to disable any pop-up blockers prior to clicking the Launch button or the course will be blocked from opening in a new window.

Launch On-Demand Courses

After you [purchase](#) an On-Demand course, the course appears in the **Thomson Reuters On Demand Learning (Courses Available)** section on the **Learning** page and **Homerroom** page.

Note: If you purchase a subscription package, On-Demand courses appear instead on **My CPE** tab.

The procedure for launching an On-Demand course is the same from the **Homerroom** tab or the **Learning** tab.

Note: Before starting this procedure, ensure that your pop-up blocker is disabled.

To launch an On-Demand course:

1. Click **Homerroom** tab.

The **Homerroom** page appears.

2. In the **Thomson Reuters On Demand Learning (Courses Available)** section, click the **Click here for the complete list of courses you own** link.

The **On Demand Learning (Courses Available)** page appears with the complete list of On-Demand courses. Courses that are ready to launch have a **Launch** link.

3. Click the **Launch** link for the course you want.

The selected course opens in a new window.

Premier, Professional, and Compliance Package Users

If you purchase the Premier, Professional, and Compliance package, the **My CPE** tab appears in your account. This tab lists all the training courses you have purchased (approximately 500 in various formats, topics, and fields of study). The package includes the following continuing education formats:

- Online Self Study (Online Method)
- Online Self Study (Download Method)
- Print-Based with OG (Online Grading)
- Webinars

Note: Refer to the [Find Purchased On-Demand Courses](#) topic to learn more about these formats.

Hide and UnHide an Expired or Incomplete Course

To hide your expired or incomplete courses, do the following:

1. Click **Homeroom**.

The **Homeroom** page appears.

2. In the **In Progress** section, click **In Progress** link. The **In Progress** page appears.

By default, the In Progress page displays a list of incomplete or expired courses. To hide a course click **Hide** under the **Launch** link to the right.

When you view all the courses in your In Progress section the course you have hidden will not be displayed.

To unhide your expired or incomplete courses, do the following:

1. Click **Homeroom**.

The **Homeroom** page appears.

2. In the **In Progress** section, click **In Progress** link. The **In Progress** page appears.

At the end of the list of incomplete or expired courses in the In Progress page a **Show Hidden Courses** link is displayed.

3. Click **Show Hidden Courses**.

The **In Progress** page displays a list of hidden courses.

4. Select the checkbox next to the title of the course you would like to unhide and click **UnHide Course**.

The course you have chosen to unhide will now be displayed in your In Progress section.

Download Checkpoint Learning Courses

Courses in the download format allow you to launch and complete them without connectivity to the Internet. In order to complete courses in the download format, the [Checkpoint Learning Offline Player](#) must be installed on your computer.

Note: Internet access is required initially to download the course. Internet access is not needed to launch and complete the course.

To download Checkpoint Learning courses:

1. Locate your courses in the **Thomson Reuters On Demand Learning (Courses Available)** section on the **Learning** page and **Homeroom** page.

Note: If you have purchased a subscription package, your courses appear instead on the **My CPE** tab.

2. Locate the course you want to download and select the **Download** option beneath the course title.

When you select the **Download** option, the **Launch** button changes to a **Download** button.

3. Click the **Download** button.

The **Course Profile** page appears with details about the course, including a summary, learning objectives, and prerequisites.

4. Click the **Download** button in the **Course Activity Details** section.

Note: If you have not already installed the correct version of Checkpoint Learning Offline Player, you will be prompted to click the "**Click here**" link to download and install the Offline Player.

5. Click the **Download** button to install the course.

The **Checkpoint Learning Login** page appears.

6. Enter your Checkpoint Learning **user name** and click the **Login** button.

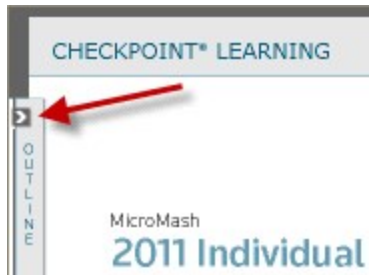
7. After the course is installed, click the **Launch Player** button.

8. On the next page, enter your Checkpoint Learning user name and click the **Login** button.

The **Available Courses** page appears.

9. Click the **Launch** icon .

10. When the course opens, click the arrow on the left to expand the **Outline** menu.



11. Use the left and right arrows in the bottom right corner to navigate through the course. You can also select a topic directly from the **Outline** menu.
12. Click the **Exit** link at the bottom of the page when you are ready to close the course.

Download the Offline Player

The **Checkpoint Learning Offline Player** allows **Thomson Reuters** courses to be played on a computer without Internet connectivity.

Note: Internet access is required to download the **Checkpoint Learning Offline Player**.

To download the offline player, do the following:

1. Login to your **Checkpoint Learning** account and select your downloadable course. Click the **Download** button and the **Checkpoint Learning Offline Player** window opens up.
2. Click the **Click Here** link within the note. A dialog box opens up.

Note: Please ensure that you have version 3.5 of Offline Player installed on your computer. If not, please install it first and then return to this page to download the course. [Click here](#) to download and install Offline Player 3.5.

3. In the dialog box, click **Run** and the setup will start to download.
4. In the dialog box that opens up, click **Run** to confirm and the **Checkpoint Learning Offline Player - InstallShield Wizard** opens up.
5. Click the **Update** radial button and then select the **Next** button.
6. Click **Install** to begin the installation.
7. Once **Checkpoint Learning Offline Player** has been successfully installed, click **Finish** to exit the wizard.

Launch the Checkpoint Learning Offline Player

Thomson Reuters on-demand download format courses on your computer must be launched with the **Checkpoint Learning Offline Player**. Once you launch the Checkpoint Learning Offline Player, the list of all downloaded courses will display. From this list select any or all of the programs to complete.

To launch the Checkpoint Learning Offline Player (there are several ways to launch the offline player)

- Click the **Start** button on the Windows task bar, point to **Programs**, select **Checkpoint Learning Offline Player** and click Checkpoint Learning Offline Player from the programs list. The Login page is displayed.

OR

- Click the Launch Player button immediately after downloading the course.

OR

- Right click on the Offline Player Service Manager icon displayed in the system tray of your computer.
- Select Launch Checkpoint Learning Offline Player.

OR

- Double click the Checkpoint Learning Offline Player icon displayed on the Desktop of your machine.

Note: Keep in mind if you have Internet access, the online format is the suggested method, if you are traveling and will not have Internet access, try the download format. Keep in mind that we do not support Windows 7 or Vista, 64 bit type of OS. We also support Internet Explorer 7 and up, and Mozilla Firefox. Be sure to disable all popup blockers in either browser.

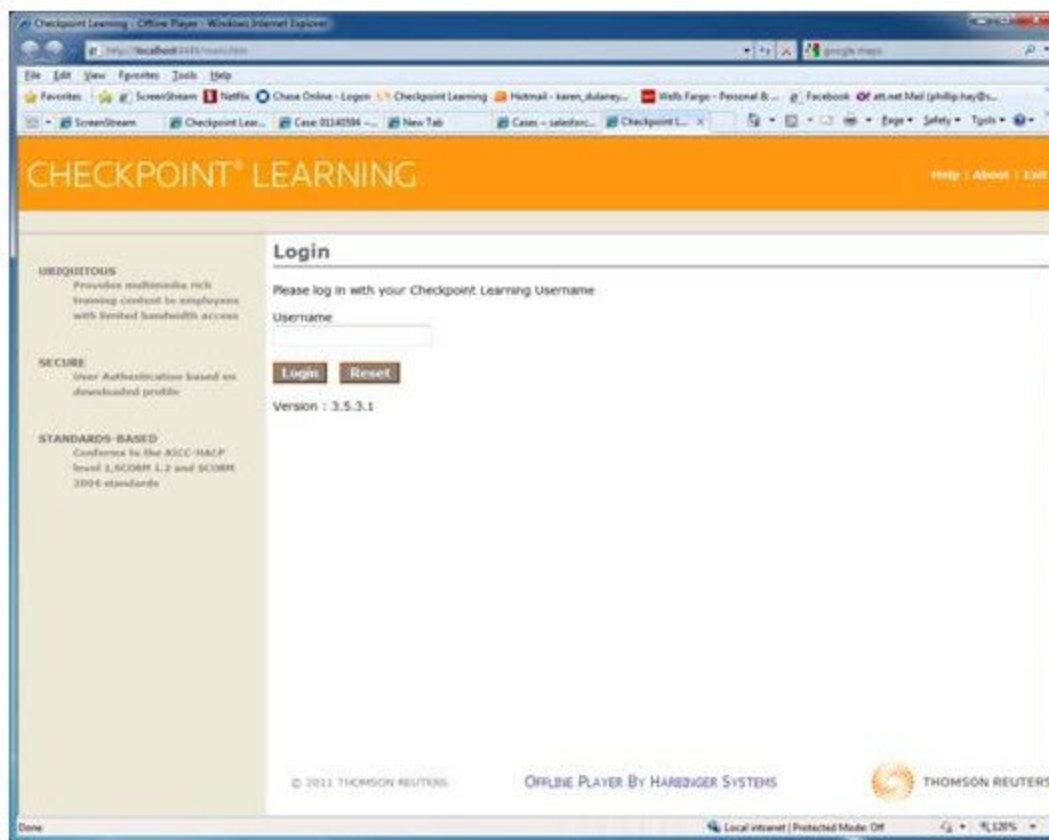
Access Downloaded Courses

After you download a course, you can access the course anytime through the Checkpoint Learning Offline Player.

To access Checkpoint Learning courses previously downloaded:

1. Select **Start > All Programs > Checkpoint Learning Offline Player 3.5 > Checkpoint Learning Offline Player 3.5.**

The **Login** page appears.

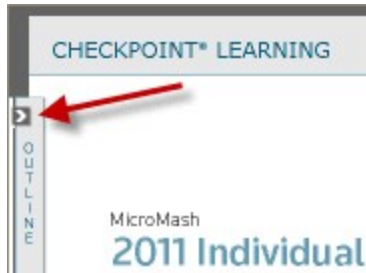


2. Enter your Checkpoint Learning user name.
3. Click the **Login** button.
The **Available Courses** page appears.
4. Click the **Launch** icon next to the course you want to open.

Navigate Through a Thomson Reuters On-demand Course

A Thomson Reuters on-demand course may be available to you in an online format, a downloadable format, or both.

When you launch a course, by default the course opens in a new window through the online player (for online courses) or the offline player (for downloaded courses). Once the course is open, use the left and right arrows in the bottom right corner to navigate through the course. You can also click the arrow on the upper left to view the retractable **Outline** menu which enables you to directly navigate to any topic in the course.



Note: Be sure to disable any pop-up blockers prior to clicking the Launch button or the course will be blocked from opening in a new window.

Click the **Exit** link at the bottom of the page when you are ready to close the course.

View On-Demand Course Results

Once you have completed an On-Demand course, the course activity details appear within your **Activity History** tab. Credits from the completed On-Demand course activity automatically distribute to your regulators. The electronic certificate is added to your certificates list and is available to be printed.

To view your completed On-Demand activity:

1. Click the **Activity History** tab.

The **Activity History** page appears.

2. In the **Title** column, click the On-Demand course activity title.

The **Activity Profile** page appears with the course activity and accreditation details.

To view your completed On-Demand certificates:

1. Click the **Activity History** tab.

The **Activity History** page appears.

2. Click **Certificates & Documents** from the **Activity History Menu** on the left side panel.

The **Course Completion Certificates and Learning Documents** page appears.

3. In the **Course Activity** column, click the course activity title.

The **Certificate of Attendance** page for the activity appears.

Purchase Online Grading Exams

Checkpoint Learning's Online Grading feature provides access to self-study, print-based course exams.

To purchase Online Grading exams:

1. Click the **Online Grading** tab.

The **My Exams** page appears.

2. Click **Purchase Exam** in the left side bar (or click the **Buy Exam** button on the right).

The **Purchase Exams** page appears.

3. Scroll down the list to find the exam you want, or enter search criteria to find your course:

- **Exam Code** – Enter the exam code of the desired Online Grading course you want to take.
- **Title** – Enter the title of the desired Online Grading course you want to take.
- **Brand** – Select a brand from the drop-down list to search for the Online Grading course you want to take.

4. Click **Search**.

The search result displays the exam or exams that match your search criteria.

5. Select the check box for the exam you want to purchase.
6. Click the **Buy Now** button at the bottom of the page.

The **Shopping Cart** page appears.

Note: If you have not yet entered a shipping address for your Checkpoint Learning account, you will be prompted to complete the shipping address form. Complete the form and click **Continue**.

7. Review your order and click the **Continue** button.

The **Billing & Shipping** page appears.

8. In the **Billing Information** section, enter the following information:

- **Payment** – Select an option from the drop-down list.
- **First Name** – Confirm or type your first name.
- **Last Name** – Confirm or type your last name.
- **Card Number** – Type your credit card number in the field.
- **Expiration** – Select the credit card expiration date from the month and year drop-down lists.
- **My Bill To address matches the billing address on my credit card** – Select this check box if true.

- **Address 1** – Type the billing address in the field.
- **City** – Type the billing city in the field.
- **State** – Select the billing state from the drop-down list.
- **Zip Code** – Type the billing zip code in the field.

9. Click the **Continue** button.

The **Order Summary** page appears.

10. Click the **Complete Checkout** button.

The **Your Receipt** page appears.

When you are ready, you can [take the exam](#) you just purchased.

Take Online Grading Exams

Once you [purchase](#) an online grading exam, you can go to the **Online Grading** tab or the **Homerroom** tab to take the exam.

To take an exam from the Online Grading tab:

1. Click the **Online Grading** tab.

The **My Exams** page appears.

2. In the **Exams Purchased** section, click the exam title that you want to take.

Once launched, the exam appears in the **Exams in Progress** section on the **My Exams** page.

To take an exam from the Homerroom tab:

1. Click the **Homerroom** tab.

The **Homerroom** page appears.

2. In the **Thomson Reuters On Demand Learning (Courses Available)** section, either click the **Launch Exam** link or click the exam title for the exam that you want to take.

Note: If you have purchased a subscription package, your purchased exams appear instead on the **My CPE** tab.

Once launched, the exam appears in the **In-Progress** section on the **Homerroom** page.

View Online Grading Exam Results

Upon completion of an Online Grading exam, your results are automatically posted in your Activity History.

To view your Online Grading exam results:

1. Click the **Activity History** tab.

The **Activity History** page appears.

2. Click the title of the Online Grading exam whose results you want to view.

The **Activity Profile** page appears with activity and accreditation details.

Purchase Seminars and Conferences

The Checkpoint Learning Course Catalog feature enables purchases of seminars and conferences, live events sponsored by Thomson Reuters.

To purchase a Seminars and Conferences:

1. Click **Course Catalog**.

The **Advanced Search** page appears.

2. Enter search criteria according to :
 - **Keywords**
 - **Credits**
 - **Topic**
 - **Delivery Format**
 - **Media Format**
 - **Specialized Designations**
 - **Date: - Through:**
 - **Location of Live Seminar or Conference**

3. Click **Search**.

The search result displays the seminars and conferences that match your search criteria.

4. Select the check box for the seminar/ conference you want to purchase.
5. Click the **Buy Now** button at the bottom of the page.

The **Shopping Cart** page appears.

Note: If you have not yet entered a shipping address for your Checkpoint Learning account, you will be prompted to complete the shipping address form. Complete the form and click **Continue**.

6. Review your order and click the **Continue** button.

The **Billing & Shipping** page appears.

7. In the **Billing Information** section, enter the following information:
 - **Payment** – Select an option from the drop-down list.
 - **First Name** – Confirm or type your first name.
 - **Last Name** – Confirm or type your last name.

- **Card Number** – Type your credit card number in the field.
- **Expiration** – Select the credit card expiration date from the month and year drop-down lists.
- **My Bill To address matches the billing address on my credit card** – Select this check box if true.
- **Address 1** – Type the billing address in the field.
- **City** – Type the billing city in the field.
- **State** – Select the billing state from the drop-down list.
- **Zip Code** – Type the billing zip code in the field.

8. Click the **Continue** button.

The **Order Summary** page appears.

9. Click the **Complete Checkout** button.

The **Your Receipt** page appears.

When you are ready, you can [view the details](#) of the event you purchased.

View Seminars and Conferences Registrations

Once you purchase a Seminar or Conference, go to **Homerroom** to the **Live Learning** calendar and navigate to the date of the Seminar or Conference. Click the **Seminar** or **Conference** title to view the event details and the attendance ticket button on the left-hand panel.

See [View Attendance Ticket](#).

View an Attendance Ticket for a Seminar/Conference

To view an attendance ticket for a Seminar or a Conference:

1. Go to **Homerom** scroll down to the **Live Learning** calendar and navigate to the appropriate month and year on the calendar. You will see the title of the seminar or conference you have registered for displayed on the scheduled date.
2. Click the Seminar or Conference title and the **Course Activity Profile** page is displayed.
3. Click **the View Attendance Ticket** button on the upper-right corner of the **Course Activity Details section** or under the **Attendance Ticket** section in the left-hand navigation pane.
4. The attendance ticket is displayed in .pdf format. Print a copy of the ticket and carry it with you to the Seminar or Conference.

Check Webinar System Requirement

For future Checkpoint Learning Webinars technical issues, users can test system/browser compatibility by doing the following:

Click the link below or copy and paste it in your web browser window to test your browser settings/compatibility with WebEx: <http://www.webex.com/test-meeting.html>

Note: Remember WebEx event center can take more than 60 seconds to download/setup on your browser.

WebEx System Requirements

WebEx works with Windows 2000, Windows XP, Windows 2003, Windows Vista and Windows 7 operating systems. It supports the 32-bit version of all systems, and the 64-bit version of Vista and Windows 7.

WebEx software works inside your Web browser. In Windows, use either Internet Explorer versions 6, 7, 8 or 9, Firefox versions 3.x or 4, or Chrome versions 9 or 10. If using Internet Explorer, enable ActiveX; for all other browsers, install JavaScript, Sun Java 5 or higher, and enable cookies.

Mac OS X 10.5 or 10.6

With Mac OS X 10.5 or 10.6, you can access most WebEx features, though you will be unable to use Remote Access. Supported Mac browsers include versions 4 and 5 of Safari, versions 3.x and 4 of Firefox, and versions 9 and 10 of Chrome. All browsers must have cookies enabled and should have the latest versions of JavaScript and Apple Java 5 installed.

WebEx works on any Mac hardware, laptop or desktop, providing it has an Intel processor and at least 512 MB of RAM.

Purchase Webcasts and Webinars

The Checkpoint Learning Course Catalog feature enables purchases of webinars and webcasts, live events sponsored by Thomson Reuters.

To Purchase Webcasts and Webinars

1. Click **Course Catalog**.

The **Advanced Search** page appears.

2. Enter search criteria according to :

- **Keywords**
- **Credits**
- **Topic**
- **Delivery Format**
- **Media Format**
- **Specialized Designations**

3. Click **Search**.

The search result displays the webinars or webcasts that match your search criteria.

4. Select the check box for the webinar/webcast you want to purchase.
5. Click the **Buy Now** button at the bottom of the page.

The **Shopping Cart** page appears.

Note: If you have not yet entered a shipping address for your Checkpoint Learning account, you will be prompted to complete the shipping address form. Complete the form and click **Continue**.

6. Review your order and click the **Continue** button.

The **Billing & Shipping** page appears.

7. In the **Billing Information** section, enter the following information:

- **Payment** – Select an option from the drop-down list.
- **First Name** – Confirm or type your first name.
- **Last Name** – Confirm or type your last name.
- **Card Number** – Type your credit card number in the field.
- **Expiration** – Select the credit card expiration date from the month and year drop-down lists.

- **My Bill To address matches the billing address on my credit card** – Select this check box if true.
- **Address 1** – Type the billing address in the field.
- **City** – Type the billing city in the field.
- **State** – Select the billing state from the drop-down list.
- **Zip Code** – Type the billing zip code in the field.

8. Click the **Continue** button.

The **Order Summary** page appears.

9. Click the **Complete Checkout** button.

The **Your Receipt** page appears.

When you are ready, you can view the details of the event you purchased.

Obtain a Certificate for Attending a Webinar

Thomson Reuters Webinar certificates are emailed to attendees within two weeks of the program date.

Purchase Subscription Packages

The Checkpoint Learning Course Catalog feature enables purchases of subscription packages sponsored by Thomson Reuters.

To purchase a Subscription package, do the following from within your Checkpoint Learning account:

1. Click **Course Catalog**.
2. Click the plus sign to expand the **Bundle Packages** located on the left side panel.
3. Click **CPE Packages**
4. Click the **Buy Now** button for the desired package
5. Click **Choose Monthly** and select the payment option from the drop down menu or click **Save Now** and follow the prompts to the Shopping Cart

Note: If you have not yet entered a credit card to your Checkpoint Learning account, you will prompted to do so. Click Cancel to cancel the transaction or Ok

6. Click the **Continue** button.

The **Billing & Shipping** page appears.

7. In the **Billing Information** section, enter the following information:
 - **Payment** – Select an option from the drop-down list.
 - **First Name** – Confirm or type your first name.
 - **Last Name** – Confirm or type your last name.
 - **Card Number** – Type your credit card number in the field.
 - **Expiration** – Select the credit card expiration date from the month and year drop-down lists.
 - **My Bill To address matches the billing address on my credit card** – Select this check box if true.
 - **Address 1** – Type the billing address in the field.
 - **City** – Type the billing city in the field.
 - **State** – Select the billing state from the drop-down list.
 - **Zip Code** – Type the billing zip code in the field.

8. Click the **Continue** button.

The **Order Summary** page appears.

9. Click the **Complete Checkout** button.

The **Your Receipt** page appears.

Access Subscription Package Content

Welcome to your Checkpoint Learning subscription.

To [access your content](#), click the MY CPE tab located at the top of your Checkpoint Learning account. Thomson Reuters offers programs in a variety of formats. See the related links below to view the steps for the format of interest.

- [Download Courses](#)
- [Online Courses](#)
- [Print-based with Online Grading](#)
- [Seminars and Conferences](#)
- [Webinars and Webcasts](#)

Register for Courses that Qualify for Discount

Search for seminars and conferences using **Course Catalog**. Enter part or all of the title in the **Search** field and then click the **Search** button. The search can be customized to find by state as well.

To search for seminars and conferences, do the following:

1. Click **Course Catalog**.
2. Under the **Media Format** section, select the **Seminar** and **Conferences** check boxes.
3. Click the **Search** button.
4. Click the **Show All** link to show the list of program dates and options.
5. Select the checkbox next to the seminar or conference.
6. Click the **Buy Now** button.

Note: Purchasing the course through the shopping cart is necessary to apply any discounts. For Premier package customers, the discount applies automatically to applicable programs in the shopping cart.

7. Click the **Continue** button to confirm the course order.
8. Complete the Payment Information section.
 - **Payment Method** – Select a payment method from the drop-down list.
 - **My Bill To address matches the billing** – Select the check box or enter the billing address in the address fields.
 - **Card Number (Card numbers only)** – Enter the credit card number.
 - **Expiration** – Select the expiration month and year from the respective drop-down lists.
9. Click the **Continue** button.
10. Click the **Complete Checkout** button.

For Premier Package Owners: Register for Webinars

Note: Webinars are included for Premier package owners only. Other package owners can purchase webinar events from **Course Catalog**.

If you have purchased a Premier package, all of your subscription programs are displayed in **My CPE**. You can search **My CPE** for specific courses by topic, term, or format. In the Premier package, you are eligible to register for the one-to-four hour webinars only. To receive CPE credit for an event you must register for the webinar.

In the Premier package you will have the ability to attend events that are purchased within your subscription period, even if the event is outside of your subscription period.

To register for a purchased webinar, select the webinar and click the **Register** button. For those who wish to attend our webinars as a group, please be sure that all attendees are registered for the event and be sure contact us at 1.800.231.1860 to receive a group moderator form to ensure all receive CPE credit.

Upon registering for a webinar event, an email with the webinar instructions will be sent to you within 24-48 business hours of the event time.

Last minute registrations are accepted. If you are registering within two hours of the event, please contact 1.800.231.1860 to ensure you receive your login information.

If you want to receive order confirmation emails, be sure that your account settings are set appropriately. Click **Settings** and select **Edit Preferences** from the left side panel. Make sure your email address is correct and select the **Yes** option for the "Would you like to receive reminders and notifications at this email address?" preference.

If you cannot attend an event for which you have registered, simply press the **Unregister** button for the event.

If you have questions, please call us at 1.800.231.1860 or email us at thomsonreuterswebinars@thomsonreuters.com.

Register for Suggested Replacement Courses

To stay abreast of the latest topics, Checkpoint Learning is continually updating content to bring you the latest and greatest information. Conversely, some material becomes outdated and needs to be removed from the platform. These courses are retired.

Checkpoint Learning suggests courses to replace those programs that have been retired. For a course that has been retired, you are notified of replacement courses which can be taken instead of the retired course.

When you purchase a bundle, you will be notified of any applicable retired course in the bundle in your **Open Order** and can purchase the bundle without the retired course. Replacement suggestions will be offered for the retired course which allow you to purchase one of the recommended courses.

In the **On Demand** section of your **Homeroom**, when you select a purchased event or course which has been retired, you will receive a notification of deactivation of the course and suggested replacements. Select the link of a suggested replacement to view the **Course Description** via your **Shopping Cart** order.

Access Content from a Library

Welcome to your Checkpoint Learning library.

To access your content, click the Thomson Reuters On-Demand Courses Available link from your Homeroom tab. Thomson Reuters offers programs in a variety of formats. See the related links below to view the steps for the format of interest.

- [Download Courses](#)
- [Online Courses](#)

Assessment Results

My Assessment Results

Your Assessment Reports

- [My competency assessment on Aug-11-2010](#)
- [My competency assessment on Aug-11-2010](#)
- [My competency assessment on Aug-11-2010](#)
- [My competency assessment on Aug-10-2010](#)
- [My competency assessment on Aug-10-2010](#)
- [My competency assessment on Aug-10-2010](#)
- [My competency assessment on Aug-10-2010](#)
- [My competency assessment on Aug-10-2010](#)
- [My competency assessment on Aug-10-2010](#)
- [My competency assessment on Aug-10-2010](#)

My Assessment Results displays a link to all previously completed assessments. If an individual has been previously selected as a manager or coach by another party, the link to that party's report will also be displayed in this section.

For optimum results, review the following items:

1. Use the results of the self-assessment as a baseline.
2. Establish a goal with action steps.
3. Progress through increasing levels of difficulty (start with awareness building).
4. Provide benchmark or method for assessing performance.
5. Estimate time needed to achieve goal.
6. Agree on method for measuring success.
7. Check in at regular intervals to monitor progress.

Checkpoint Learning Competency Model

A competency model is a descriptive tool that ascertains the skills needed to perform a specific role in a job, organization, or profession. The **Checkpoint Learning Competency Model**, designed specifically for finance and accounting professionals, provides the foundation for setting learning goals and plans, discussing performance management issues, and planning career strategies.

Note: For more information on subscribing, please call: 1-800-231-1860.

Structure and Definitions

The Checkpoint Learning Competencies are organized by level, area of specialty, and category seen below:

By Levels:

- **Staff** – Individuals with this title usually have up to three years of work experience. They should have strong analytical, communication, and organizational skills. A staff accountant or auditor should have some proficiency with Microsoft Office applications and database applications. People in these positions usually possess or are working towards a CPA, CIA, or CMA accreditation. A bachelor's degree in accounting is usually required for this position.
- **Senior** – Seniors usually have at least three years of work experience and a bachelor's degree in accounting. They should have robust communication, organizational, interpersonal, problem-solving, and project management skills. Seniors usually supervise accounting and auditing staff. They should possess superior technology skills, including proficiency with Microsoft Office applications and database applications. Seniors should possess or be working towards a CPA, CMA, or CIA credential. Some organizations prefer that these individuals have a master's degree, such as a MBA.
- **Manager** – Managers have at least five years of work experience and have a bachelor's degree in accounting. They should have well-developed analytical, communication, interpersonal, leadership, and problem-solving abilities. Managers should have Microsoft Excel expertise. These individuals direct the work of accounting, audit, tax, or management service staff as well as oversee project teams. Managers conduct research, perform planning, and make recommendations to senior management. A CPA, CMA, or CIA designation is required. Organizations prefer that managers have advanced degrees, such as a MBA.
- **Director** – Directors generally have at least seven to eight years of work experience. Organizations expect a bachelor's degree in accounting at a minimum, but most organizations prefer a master's degree. These individuals oversee the accounting, audit, tax, or management service practice area and the related staff. Directors have excellent analytical, communication, leadership, negotiation, problem-solving, and strategic-planning skills. They research business issues and provide guidance to senior management and assist with business development. A CPA, CMA, or CIA designation is essential.

By Areas of Specialty – Technical skills defined in the following ways:

- **Corporate Accounting** – Demonstrating technical and subject matter expertise in the delivery of professional services; preparing and analyzing financial information to provide to external and internal users.

- **External Audit** – Demonstrating technical and subject matter expertise in the delivery of professional services; accumulating and verifying the data supporting the preparation of financial statements and internal controls of the financial reporting process.
- **Internal Audit** – Demonstrating technical and subject matter expertise in the delivery of professional services; performing independent reviews of the company’s financial and operating systems; assisting in the examination of financial statements.
- **Tax** – Demonstrating technical and subject matter expertise in the delivery of professional services; determining liability to various taxing authorities for income tax, licenses, sales tax, property tax and payroll tax.
- **Financial Management** – Demonstrating technical and subject matter expertise in the delivery of professional services; accumulating, analyzing, and reporting financial and non-financial data in a format and level of detail required by management for making business decisions.

By Categories – Non-technical skills defined in the following ways:

- **Client Service** – Demonstrating a clear understanding of the clients’ needs and using the appropriate tools and techniques to deliver quality service
- **Research** – Accessing various information and literature to determine relevance and application
- **Technology** – Using basic technology as it specifically relates to your industry
- **Communication** – Applying effective verbal and written communication skills needed in reports, presentations and meetings
- **Business Analysis & Interpretation** – Reviewing and evaluating relevant business information
- **Problem Solving & Decision Making** – Demonstrating the principles and techniques needed to solve problems and render good judgment
- **Risk Analysis** – Identifying, evaluating and managing business risk
- **Leadership** – Taking charge by demonstrating strategic thinking, professionalism and systemic planning
- **Management** – Providing direction achieving project goals and service delivery
- **Professional Development** – Adopting and encouraging a culture of continual learning, knowledge sharing and goal setting for career development and promotion
- **Legal & Regulatory** – Knowing applicable regulations, codes and professional standards
- **Ethics** – Demonstrating an awareness and understanding of legal and ethical behavior
- **Industry & Global Perspective** – Knowing industry and global implications and requirements

Competencies

The competencies are written not only to describe the skills, knowledge, and attitudes needed to be proficient and successful, but provided in observable and measurable language to make it easier for you to apply to your job. Here are some sample competencies:

- Obtains and reviews current industry materials
- Reviews work to ensure quality and accuracy
- Meets client needs by quickly and effectively communicating client issues and concerns

These competencies describe “what” needs to be done; measurement of achievement is something that you must determine based on the standards of your organization. “How” to gain proficiency can be multi-faceted, one way is to complete the courses that are linked to the competencies; another way is to add an on-the-job activity that will provide you with hands-on experience.

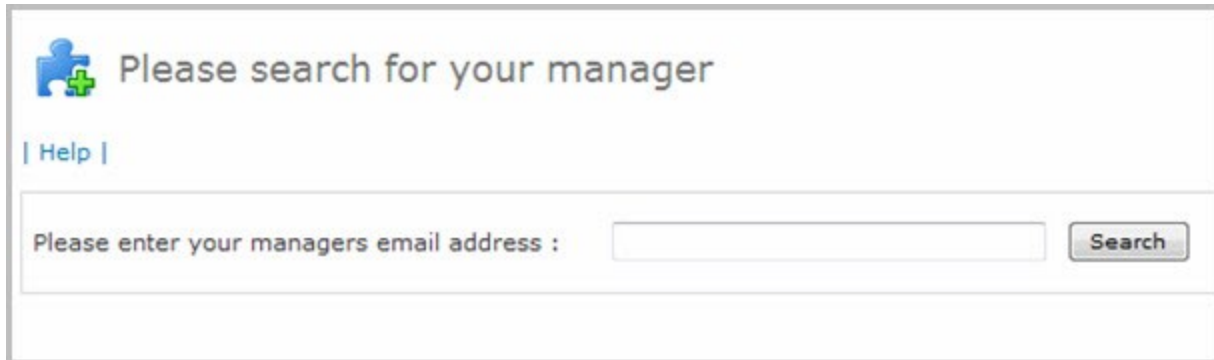
Functionality

All users can view all competencies and the courses that are mapped to them. An employee may also complete a self-assessment to the competencies of their choice, add on-the-job activities and save the reports.

Select Manager/Coach to Provide Feedback

Checkpoint Learning enables Managers and Coaches to provide feedback on competency assessments. To utilize this feature, employees must be part of Checkpoint Learning organization accounts.

Note: Receiving feedback from a Manager or Coach is only applicable with Firm accounts.



Please search for your manager

| Help |

Please enter your managers email address :

Result Options

Note: Only Managers and Coaches with active Checkpoint Learning accounts and access to the competency model can provide feedback on an assessment. For more information about this module, contact Customer Support at 1.800.431.9025.

To invite a Manager or Coach to view self-assessment, do the following:

Note: If you do not see this feature and wish to use it, please contact your Firm Administrator to have it turned on.

1. Navigate to the desired assessment.
2. Click **Invite Manager/Coach** and enter the desired Manager or Coach e-mail address.
3. Select **My Assessment Results** from the left side panel. Once they complete their scoring, their feedback will be visible.

Note: Selecting **Update Your Results** will allow an employee to change their self-rating for each selected competency. However, results can only be updated *before* a manager or coach has been invited. Once they are invited, this option will be unavailable.

Result Options

To invite your manager or coach to view a self-assessment, do the following:

Note: A Manager/Coach must have a Checkpoint Learning Account to view an employee's self-assessment.

1. Click **Invite Manager/Coach** and enter their e-mail address.
2. Select **My Assessment Results** on the left navigational panel. Once they complete their scoring, their feedback will be visible.

Note: Selecting **Update Your Results** will allow an employee to change their self-rating for each selected competency. However, results can only be updated *before* a manager or coach has been invited. Once they are invited, this option will be unavailable.

Getting Started with the Competency Model Self Assessment

To view the **Competency Model** and take the **Self-Assessment** follow the directions below:

Checkpoint Learning Competency Model

View the competency model by selecting from the options below. Click 'Search' when finished with your selection.

■ Levels

<input type="checkbox"/> Director	<input type="checkbox"/> Manager
<input type="checkbox"/> Senior	<input type="checkbox"/> Staff

■ Areas of Specialty

<input type="checkbox"/> Corporate Accounting	<input type="checkbox"/> External Audit
<input type="checkbox"/> Financial Management	<input type="checkbox"/> Internal Audit
<input type="checkbox"/> Tax	

■ Categories

<input type="checkbox"/> Business Analysis & Interpretation	<input type="checkbox"/> Client Service
<input type="checkbox"/> Communication	<input type="checkbox"/> Ethics
<input type="checkbox"/> Industry and Global Perspective	<input type="checkbox"/> Leadership
<input type="checkbox"/> Legal and Regulatory	<input type="checkbox"/> Management
<input type="checkbox"/> Problem Solving & Decision Making	<input type="checkbox"/> Professional Development
<input type="checkbox"/> Research	<input type="checkbox"/> Risk Analysis
<input type="checkbox"/> Technology	

1. Click the levels, areas of specialty and categories of interest.

Areas of Specialty are for technical competencies and **Categories** are non-technical. An employee may wish to choose competencies from both sections for a more comprehensive developmental idea. Check the box on the left of the title bar to view all the items in one area.

2. Click **Search** to view the competencies.

Read through the competencies and click on the boxes to expand the display to show the course maps that are linked to each competency. Click on an individual course name to see the course description and to be able to purchase and launch the course.

Note: If an individual has been given permission to view related courses that are mapped to the competencies, they can click the box to **Show Link to Course Maps**.

Self-Assessment

A self-assessment is a simple, quick way to record areas of strength and those in need of development.

1. Check the box in the title of each group to select all the competencies or expand and select the desired competencies .
2. Click **Start Assessment** at the bottom of the screen.

When the self-assessment screen is displayed, an employee may select the proficiency level that best describes his/her performance for each competency. Click on a competency to see this definition for the proficiency levels:

1. **Developing**

- Explains basic concepts, principles, and practices while performing routine tasks with assistance

2. **Working**

- Applies practices to more complex situations
- Applies principles without assistance and supports others
- Performs routine tasks without assistance

3. **Practicing**

- Applies principles without assistance and supports others
- Explains more complex concepts and applies knowledge
- Performs complex tasks with some assistance
- Uses a number of tools in a variety of situations

4. **Advanced**

- Contributes by active involvement in development of concepts and principles
- Contributes directly to the creation of new tools
- Explains complex concepts or principles and has in-depth knowledge
- Uses all tools at various complex levels

5. **Expert**

- Contributes to the advancement of skill or knowledge in the field external to the organization
- Develops new tools and demonstrates innovative thinking
- Leads others and performs at a high expectation level

- Leads the development of concepts and principles
- Provides in-depth expertise on varied concepts and principles having comprehensive knowledge

Competency Assessment Reports

The **Competency Assessment Result** displays the results of each selected and rated competency.



On completion of the self-assessment, click **Save and View Results**. A small bar charts of the results will be displayed, along with accompanying course maps and the ability to add on-the-job activities.

While most competencies are mapped to a **Checkpoint Learning** product to assist you in achieving proficiency in a specific skill, it is recommended that you also find on-the-job experiences to attain full knowledge transference and mastery of each competency. Applying concepts to real life job experiences will help you develop skills and proficiency.

To select an appropriate on-the-job activity do the following:

- Think of examples of activities that mirror the knowledge, skills and attitudes that the competencies embody.
- Look for activities that give hands-on practice with concepts presented in the courses.
- Determine how assessments will be made when the goals have been mastered.
- Add a date by which the skill would have been mastered.

Note: Print or save the results of the self-assessment so it can be taken again in six months to check progress.

Note: If the Firm Administrator specified **Target Ratings** for an employee as goals, they will be displayed as an additional bar within each graph. Also, if a manager or coach has been invited to provide feedback, a third bar will appear to reflect their input.

Customer Help Portal

The Tax and Accounting [Customer Help Center](#) provides support to users of all Thomson Reuters Tax and Accounting products, giving access to **Documentation**, **FAQs** (Frequently Asked Questions), **News and Alerts** and more through the search and link capabilities.

1	Access Billing and Account Management information, News and Updates , or Contact Us and avail Other Support Options
2	View all resources for a particular product by selecting the product from the Jump to Product/Category drop down menu.
3	Search the Knowledgebase by entering a keyword/question in the search box.
4	Create a Case for specific support/issues and receive assistance from the support center.

Perform a Search

The Thomson Reuters Customer Portal allows a user to search **Documentation**, **FAQs**, **Installation and Updates**, **News and Alerts**, **System Requirements** for the required resources.

To perform a search in the [Customer Portal](#), do one or more of the following:

- Select Checkpoint Learning from the **Jump to Product/Category** dropdown list towards the upper right hand side of the screen.

- Type a keyword/question in the search box under the **Search and Filter Articles** section on the left side panel and click **Search**.

To narrow the search, select one or more of the available checkboxes (**Documentation, FAQs, Installation and Updates, News and Alerts, System Requirements**) to search the respective support sources. Additionally, select an option from the **Product and Categories** dropdown list.

Create a Case

For any issue or problem that a user needs assistance with, a case can be created on the Thomson Reuters Customer Portal. To create a case in the [Customer Portal](#):

1. Click **Cases** on the upper left hand side of the screen, or, click **Create a Case** below **Contact Us** on the lower right hand side of the screen.
2. On the **Create a Case** screen, fill in personal details, firm details, inquiry details and case description, as required, in the fields provided.
3. Click **Submit** or, click **Submit & Add Attachment** and follow the given instructions in case an attachment needs to be submitted along with the case.

Support for Independent Professionals

For more information regarding administrative policies, please contact your Firm Administrator (if applicable) or the Checkpoint Learning Customer Support at 1.800.431.9025.

For all public product documentation, answers, and additional resources, go to the Customer Help Center [here](#).

For information regarding technical, product, and customer support, please use the following contact information.

Support Group	Phone Number and Email Address	Issues/Questions
Technical Support	1.800.431.9025 (follow option prompts) checkpointlearning.techsupport@thomsonreuters.com	Answer calls and emails relating to: <ul style="list-style-type: none"> • Browser-based • Certificate discrepancies • Downloading/Accessing courses • Migration questions • Feed issues
Product Support	1.800.431.9025 (follow option prompts) checkpointlearning.productsupport@thomsonreuters.com	Answer calls and emails relating to: <ul style="list-style-type: none"> • Functionality (how to use, where to find) • Content questions
Customer Support	1.800.431.9025 (follow option prompts) checkpointlearning.cpecustomerservice@thomsonreuters.com	Answer calls and emails relating to: <ul style="list-style-type: none"> • Billing • Existing orders • Cancellations • Webinars • Certificates

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