



# CHECKPOINT LEARNING: PICK YOUR COURSE BUNDLES USER GUIDE FOR THE FIRM ADMINISTRATOR

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## Introduction

Welcome to Checkpoint Learning!

This Checkpoint Learning quick start guide provides the set up instructions you need to get your users up and running quickly, including:

- Creating your End-Users' accounts.
- Choosing courses for the package. (Pick your course packages only).
- Assigning your End-Users to the package.

Be sure to check out our many Checkpoint Learning resources specifically for Firm Administrators;

- The **Help** link adjacent to the **Sign-Off** button is the complete user guide for Checkpoint Learning and comes with instructions to help support end users.
- Training, User Guides, and more on the **Support Tab**.
- The [Customer Portal](#) which houses documentation, resources, training, contact support information and more!

If at any time, you feel you need further assistance, contact our Checkpoint Learning Support Team;

- **Email:** [checkpointlearning.productsupport@thomsonreuters.com](mailto:checkpointlearning.productsupport@thomsonreuters.com)
- **Phone:** 1-800-431-9025

Thank you for your business!

*Checkpoint Learning*

## Add Employees

Checkpoint Learning enables the administrator to create employee accounts within their organizational account. Each employee account is assigned a unique user name. Once a user name is used, it cannot be used again. Checkpoint Learning recommends using the employee's email address as the user name.

**Note:** If an employee has left the firm and is coming back, you can reattach their account to your organization. See the topic [Attach an Employee Account to an Organization](#).

**To create an employee account, do the following:**

1. Click **Employees**.
2. Click **Add Employee** from the **Global Menu** on the left side panel.
3. In the **Logon Information** section, do all of the following:
  - **Username** – Enter a user name for the employee. User names must be a minimum of six characters and are not case sensitive. Checkpoint Learning recommends using the employee email address as the user name.
  - **Password** – Enter a password for the employee. Employees have the ability to log in to their account and change their individual password. Passwords must be a minimum of six characters and are not case sensitive.
  - **Confirm Password** – Reenter the password for the employee. The characters entered in this field must match the characters entered in the Password field or you will receive an error message.
4. In the **Professional Account Settings** section, do all of the following:
  - **First Name** – Enter the employee's first name.
  - **Last Name** – Enter the employee's last name.
  - **Email Address** – Enter the employee's email address.
  - **Time Zone** – Select the appropriate time zone from the drop-down list.
  - **Email Reminder** – Select Yes or No for the employee to receive automatic email reminders of his or her CE Tracking Status Reports as established by the organization's automatic email reminder routine.
  - **Write Permission for Employee** – Select Yes or No for the employee to have the ability to add and/or edit activities and regulators within their Checkpoint Learning account.
  - **Enable Thomson Reuters University** – Select Yes or No to determine whether the employee has access to any Thomson Reuters course. The option must be Yes if you plan to assign Thomson Reuters courses to a professional.
  - **Professional Authorized to Edit Pilot Test Information** – Select Yes or No to determine whether the employee is authorized to edit pilot test information.

- **Update Status Report Permission** – Select Yes or No to determine whether the employee has permission to update status reports.
- **Professional requires 508 Complaint Courses** – Leave the default set to No.
- **Send Professional Email with Login Information** - Select Yes or No to determine whether the employee will receive an email with the login information.

5. In the **Professional Designation** section, do all of the following

- **Select Professional Designation** - Select a designation from the drop down list
- **IRS PTIN Number** - Enter the corresponding designation ID Number and click **Add**

**Note:**

1. If the employee is 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 the employee is an attorney, certified public accountant, or certain other individual who does not prepare Form 1040 series returns.

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

3. If the employee is 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".

6. In the **Attributes for Organization Account** section, do all of the following:

- **Title** – Enter the employee's title.
- **Office** – Enter the employee's office.
- **Department** – Enter the employee's department.
- **Employee ID** – Enter the employee's ID if applicable.
- **Enable Learning Plan** – Select the check box to assign a learning plan seat to the employee.

**Note:** This option should not be selected unless the administrator has purchased and intends to assign the learning plan seat to the individual.

- **Enable Competency Model** – Select the check box to allow employee access to the Competency Model.

**Note:** This option should not be selected unless the administrator has purchased and intends to assign the learning plan seat to the individual.

- **Write-Permission for Organization Account** – Select Yes or No to enable the Firm Administrator to manipulate the employee account. It is recommended to always select Yes.
7. In the **Administrative Group Filter** section, select one or more groups that apply to the employee, then click the **Add** button to move to the Selected side.
    - **Administrative Groups** – Employees can have more than one group selected. Use the right arrow to move groups from the Not Selected list to the Selected list.
  8. In the **CE Tracking Modules** section, select **Accountancy & Law** to assign individual tracking seats to the employee. Available options are:
    - No CE Tracking
    - Accountancy and Law

**Note:** This option should not be selected unless the Firm bought **CE Tracking** seats in bulk. Most firms buy a subscription package with **CE Tracking** included and would therefore not select this option.

9. In the **Employee's Coaches** section, do any or all of the following:
  - **Coach** – Select the check box to the left of the coaches name to assign the coach to the employee.
  - **Edit Learning Plans** – Select the check box to indicate that the assigned coach will have the ability to edit the employee's learning plans.
  - **Compliance Emails** – Select the check box to indicate that the assigned coach will receive the employee's status report to appear on the Coach's compliance summary email.
  - **Registration Emails** – Select the check box to indicate that the assigned coach may override or veto the employee's course activity registrations.
10. In the **Notes** section, enter any notes pertaining to the employee in the text box (examples: date of birth, previous employers, location of CPE records from previous employers, society web site login information).
11. In the **Available Products** section select the respective library/bundle checkbox to assign a purchased product to the employee.
12. Click the **Submit** button to save the employee account record.

## Attach an Employee Account to an Organization

Once a Checkpoint Learning account is created, it can exist as one of the following:

- As an independent employee who owns his own account
- Attached to an organization that owns the account
- Linked to an organization to see that Firm's calendar for in-house programs or to be assigned the Firm's purchased content

**To attach an account to an organization do the following:**

Please contact Checkpoint Learning Product Support to attach an account to an organization.

1.800.431.9025 (follow option prompts)

[Checkpointlearning.productsupport@thomsonreuters.com](mailto:Checkpointlearning.productsupport@thomsonreuters.com)

Checkpoint Learning Support is available to assist you. To receive this support, do any or all of the following:

- Click [here](#) to access the customer help center, then click **Create a Case** from the **Contact Us** section on the right hand side.
- Send an email request with the employee's first name, last name and email address to [checkpointlearning.productsupport@thomsonreuters.com](mailto:checkpointlearning.productsupport@thomsonreuters.com).



## Edit an Employee Account

Checkpoint Learning enables the administrator to edit an employee's account settings and employee-related settings from the employee's account profile.

**To edit employee account settings, do the following:**

1. Navigate to the employee's [Account Profile](#).
2. Click **Edit Professional Account Settings** from the **Employees Menu** on the left side panel.

The **Edit Professional Account Settings** page appears.

3. In the Professional Account Settings section, do any or all of the following:

- **First Name** – Edit the employee's first name.
- **Last Name** – Edit the employee's last name.
- **Email Address** – Edit the employee's email address.

**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](mailto:checkpointlearning.cpecustomerservice@thomsonreuters.com) to locate the account or provide another email address.

- **Time Zone** – Select the appropriate time zone from the drop-down list.
  - **Email Reminder** – Select Yes to enable the employee to receive automatic email reminders of his or her CE Tracking Status Reports as established by the organization's automatic email reminder routine. Select No to disable this function.
  - **Write Permission for Employee** – Select Yes to enable the employee to add, modify, and/or delete CE Tracking records associated with his or her account when logged into the account. Select No to disable the employee's ability to perform these functions.
  - **Enable Thomson Reuters University** – Select Yes to enable the employee to access to any Thomson Reuters course. The option must be Yes if you plan to assign Thomson Reuters courses to an employee. Select No to disable the employee's ability to perform this function.
  - **Professional Authorized to Edit Pilot Test Information** – Select Yes to enable the employee to edit pilot test information. Select No to disable the employee's ability to perform this function.
  - **Update Status Report Permission** – Select Yes to enable the employee to update status reports. Select No to disable the employee's ability to perform this function.
  - **Professional requires 508 Complaint Courses** – Leave the default set to No.
  - **Professional Designation** – Select a designation from the drop down list and enter the corresponding designation ID Number.
4. Click the **Submit** button to save changes to the employee account settings.

**To edit employee-related settings do any or all of the following:**

1. Navigate to the employee's [Account Profile](#).
2. Click **Edit Employee-Related Settings** from the **Employees Menu** on the left side panel.

The **Edit Employee-Related Settings** page appears.

3. In the sections below, do any or all of the following:
  - **Title** – Edit the employee's title.
  - **Office** – Edit the employee's office.
  - **Department** – Edit the employee's department.
  - **Employee ID** - Edit the employee's ID.
  - **Enable Learning Plan** – Select the check box to enable the Learning Plan for the employee.
  - **Enable Competency Model** – Select the check box to enable the Competency Model for the employee.
  - **Write-Permission for Organization Account** – Select Yes to enable the organization to add, modify, and/or delete records for the employee. Select No to disable this function.
  - **Administrative Group Filter** – Edit the employee's administrative groups.
  - **CE Tracking Modules** – Edit the CE Tracking Module for the employee.
  - **Employee's Coaches** – Edit the employee's coach or coach abilities.
  - **Notes** – Edit the employee's notes.
4. Click the **Submit** button to save changes.

## Navigate to an Employee's Account Profile

Throughout the Help, many procedures begin with the step "Navigate to the employee's Account Profile." This refers to performing the steps in this topic. For convenience, the term "Account Profile" in those topics is a hyperlink that connects back to this topic for a reminder if necessary.

**To navigate to an employee's account profile, do the following:**

1. Click **Employees** from the **Main Menu**.
2. Type the last name of the employee in the **Employee Search** field.
3. Click the **Search** button.

If there is more than one employee with the same last name, the search results display all matching employees. If there is just one employee with that particular last name, the **Compliance Manager** page for the employee appears.

4. Click the name of the appropriate employee.

## Pick Courses for the "Pick Your Courses" Bundles (P##W, P50W, P25W, P10W, P05W)

To pick a course to add to the Pick Your Course Bundle, do the following:

1. Click **University**.
2. On the left side panel, under the **University Menu**, click the title of the bundle to which the course is to be added (the **Bundle Package Profile** can also be accessed by clicking the bundle title from the **University** page, under the **Products Purchased** section).
3. If adding a course to the bundle for the first time, do the following or skip to step 4:
  - On the **Bundle Package Profile** page, click **Edit Bundle Package Info** in the left side panel.
  - Enter a description in the **Description** field and click the **Save** button
4. Click **Edit Courses List** in the left-hand navigation pane or to the right-hand side of the **Courses** section on the **Bundle Package Profile** page.
5. Select the checkbox corresponding to the course to be added to the bundle.
6. Click the **Submit** button.

## Assign Purchased Content/Packages to Learners

Once the employee accounts are created, content (courses or packages) can be assigned to the employees. There are two methods to assign content to employees—from the **University** menu on the left side panel or from the **Purchased Products** section located at the bottom of the **University** page.

To assign content to employees from the **University** menu, do the following:

1. Click **University**.
2. From the **University** menu located on the left side panel, do any or all of the following.
  - Click **Self Directed Learning** for **Thomson Reuters Retail Courses**. Click **Thomson Reuters Retail Courses**. Click the course title from the **Courses** section on the **Bundle Package Profile** page. Click **Edit Employee List** from the left side panel.
  - Click the desired bundle name located below the **Self Directed Learning** link from the left side panel. Click **Edit Employee List** from the left side panel.
  - Click **Instructor Led Learning** from the left side panel. Click **Seminars and Conferences** or **Webinars and Webcasts**. Click the desired course title. Click **Edit Employee List** on the left side panel.
  - Click the desired **Subscription Packages** name from the left side panel. Click **Edit Employee List** from the left side panel.
3. From the **Assign Employees** page, select the checkboxes of the desired employees.
4. Click the **Submit** button.

To assign content from the **Products Purchased** section, do the following:

1. Click **University**.
2. In the **Products Purchased** section, do any or all of the following:
  - Select **Thomson Reuters Retail Courses**, **Seminars and Conference**, or **Webinars and Webcasts** for individually purchased courses. Click the course title. Click **Edit Employees List**. The **Edit Employee** page is displayed.
  - Click the **Edit Employee List** icon respective to the desired package located on the far right of the **Products Purchased** section.
3. Select the checkbox of the desired employee and click the **Submit** button.