CHECKPOINT LEARNING FIRM ADMINISTRATOR USER GUIDE
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Welcome to Checkpoint Learning for Firm Administrators

Need Help? Call: 1.800.431.9025 or email us at checkpointlearning.productsupport@thomsonreuters.com

Welcome to Checkpoint Learning, a one-stop shop for providing Continued Professional Education (CPE) and Continued Education (CE) tracking for firm employees. The Firm Administrator has the ability to perform the following actions in Checkpoint Learning.

**Tracking CPE**
- Add, remove, and edit employee accounts within the organization.
- Assign regulators to track their CPE requirements.
- Produce regulator status reports to submit for license renewals and audits.
- Analyze status of employees meeting the specific requirements of a regulator.

**Managing In-Firm Courses**
- Add in-house courses and course activities to the University calendar.
- Track registration and give credit for attendance.
- Issue electronic or paper certificates and evaluations.
- Control each employee’s Checkpoint Learning course access.
- Link Checkpoint Learning accounts to the organization account.

**Learning Plan Module**
- Create learning plans and paths for employees.
- Track each employee’s progress and compliance.
- Monitor each employee’s overall learning plan status.

**Competency Model**
- Edit competencies, levels, areas of specialty, and categories.
- Edit setup for Firm Administrator and Firm employee roles.
- Run assessment reports.

**Branding Checkpoint Learning**
- Create automatic reminder, status report update, and other emails for employees.
- Create the administrative groups that define the employees.
- Add, edit, and remove other Firm Administrator accounts.
- Edit your Administrator account settings.
- View log entries of Firm Administrator actions.
- Control the data views of employees and administrators.
- Generate an MS Access database of your Firm's data.

Support
- View training videos to assist in getting started with Checkpoint Learning account.
- View or print materials that provide step-by-step instruction on how to perform specific functions.
- Read the latest updates to the Checkpoint Learning system.

Regulator Rules
- Access state and society rules, CPE requirements, support web site, and contact information.

Reporting
- Create, edit, and run customized reports that are exportable to MS Excel.
New to Checkpoint Learning?

If you require live one-on-one training on topics covered by the online training videos or otherwise, schedule training. Please suggest your preferred dates and times. Training will be conducted using GoToMeeting’s web conferencing system. Once your training is scheduled, your trainer will send you instructions for using GoToMeeting.
Click any of the links below to view the relevant help topics:

**Step 1 - Setting up the Organization Account**
- Submit Firm Logo
- Submit Firm Signature (for University Module Firm Administrator only)
- Create Additional Administrator Accounts
- Create Administrative Groups
- Link Administrative Groups (Refer to Steps 7 and 8 of the linked topic.)

**Step 2 - Setting up the Professionals**
- Create New Account
- Edit Existing Account
- Professional's Username Already in Use

**Step 3 - Managing the Professionals**
- Add CE Tracking Only
- Add Subscription Package Seat (Tracking + Content)
- Add Content Only
- Enter Professional History
- Set up the E-mail Policy

**Step 4 - Setting up your In-house Content (University)**
- Create Colleges
- Create Parent Courses
- Create Course Activities

**Step 5 - Setting up your Learning Plans**
Step 6 - Setting up the Competency Module (Competency)

Create Competencies  Run Assessments  Evaluate Professionals
Log In to Checkpoint Learning

The Checkpoint Learning page allows access to many resources even before logging in to the system. The page enables an administrator to:

- Learn about the different solutions and products Thomson Reuters has to offer. View demos on how these products are used by customers.
- Use the Course Catalog to search for courses by topic, delivery format 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, do the following:


   The Checkpoint Learning page appears. (See above for what can be done 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.
     - You will see a button, toggle it and you then you will see a field to enter your Organization ID – Enter your organization’s ID.

   Entering the organization ID is a one time step and the next time you log in to Checkpoint Learning, you only have to enter your User name and password.

4. Click the Go button.

   Checkpoint Learning opens with the Compliance Manager as the default page.
Navigate Checkpoint Learning

Once logged into Checkpoint Learning, the Compliance Manager page is the default. The Checkpoint Learning interface has the following navigation conventions:

- The **Main Menu** is located along the top of the page. Clicking each category displays the corresponding page.

- Each page has options displayed in the **Left Side Panel**. Select these options to access features and functions of Checkpoint Learning.

- When an option is selected, content is displayed in the **Display Panel**.

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<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees</td>
<td>Access Compliance Manager and Employee Manager. Add employees, add activities, reset passwords, propose employee linking, and propose ownership transfers.</td>
</tr>
<tr>
<td>University</td>
<td>View the University Live Learning calendar, on-demand courses available, products purchased. Search course activities, view account statistics, and access online learning, live seminars, in-house training, self-study courses, and online grading.</td>
</tr>
<tr>
<td>Learning Paths</td>
<td>View list of learning paths, create learning paths, run learning path reports, edit learning paths, delete learning paths, assign learning paths to</td>
</tr>
</tbody>
</table>

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The following symbols and icons identify the actions you can perform in a course or employee record.

<table>
<thead>
<tr>
<th>Symbol/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title:*</td>
<td>Recognize that the asterisk symbol next to a field title means the field is required. If you do not see an asterisk, completing the field is optional.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>View a helpful popup description about the purpose of the field and what information should be entered.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Edit the associated information.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Edit the associated information.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Delete the associated information.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Assign a learning path for an employee.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Add associated information.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Email associated information.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Email associated information.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Enable/disable associated information.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Scroll backward and forward through associated information.</td>
</tr>
<tr>
<td>Symbol/Icon</td>
<td>Description</td>
</tr>
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</tr>
<tr>
<td></td>
<td>Preview the associated information or document.</td>
</tr>
<tr>
<td></td>
<td>Remove/unregister an associated activity.</td>
</tr>
<tr>
<td></td>
<td>Print associated information.</td>
</tr>
<tr>
<td></td>
<td>Duplicate a course.</td>
</tr>
<tr>
<td></td>
<td>Add a course or course activity instance.</td>
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<tr>
<td></td>
<td>Open a calendar from which you can select a date.</td>
</tr>
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**Search Courses Tab**

Checkpoint Learning’s Course Catalog enables the administrator to enter search criteria to customize your search for Thomson Reuters courses by topic, delivery format, CPE product brand, media format, and location.

**Use the Search Courses tab and toggle the button and do the following:**

1. Click **Search Courses 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 Credits, Search by NASBA Level, 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, 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 a **Buy Exam** button to purchase an exam.
   - Click a **PDF** button to view a PDF form or document.

**Note:** Access the Course Catalog by clicking the **Course Finder** button at the bottom of the **University** page.

**Note:** For Firm Professionals, the **Course Finder** button is available on their **Homeroom** page only when the Firm Administrator has authorized the display of the Ad Banner. This option is available in **Settings** in Custom Settings.
Navigating the Search Courses Tab

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<th>Function</th>
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<td>Keywords</td>
<td>Search for CPE solutions by entering a keyword in the search field.</td>
</tr>
<tr>
<td>📚 Course Catalog</td>
<td>Perform advanced search, view all new courses, search by topic, search by delivery format, search by brand, and search by location.</td>
</tr>
<tr>
<td>📚 About Our Products</td>
<td>Access overviews of new products, self-directed learning, instructor-led learning, and group solutions.</td>
</tr>
<tr>
<td>📚 Learning Management</td>
<td>Access overviews of learning management products, CPE tracking and compliance, and professional development.</td>
</tr>
<tr>
<td>📚 Tailored Solutions</td>
<td>Search for tailored solutions for corporate and industry, government, firms, individuals, registered tax preparers, and certified financial professionals.</td>
</tr>
<tr>
<td>📚 CPE Products by Brand</td>
<td>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.</td>
</tr>
<tr>
<td>📚 Follow Us On</td>
<td>Access CPE &amp; Training blog, Checkpoint Learning Facebook Page, CPE &amp; Training Facebook page, Checkpoint Learning Twitter Feed, CPE &amp; Training Twitter Feed, and CPE &amp; Training on YouTube.</td>
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Viewing Search Results

Once the search has been performed, the search results appear on the results page, do any of the following:

- **Title** – Click the course activity title to display the course activity details. From this page, either buy the course or click Preview to preview the material.
- **Buy Now** – Click this button to proceed with payment.
- **More Info** – Click this button to learn more about the course.
Online Grading

The CPE & Training Solutions Online Grading Center provides access to self-study course exams. It is possible to complete these courses, receive real-time test results, and print the CPE certificate with a simple mouse click. The Online Grading Center retains all certificates and exam results for retrieval at any time. Features include the following:

- **Around the Clock Grading**
  
  Final exams can be submitted for grading any time day or night, and immediate results are provided. Once the final exam is successfully completed, a certificate of completion can be printed.

- **No Express Grading Fees**
  
  Only a nominal grading fee is charged for online exams. Grading is immediate with no additional charge.

- **Easy Access to CPE Course Certificates**
  
  Retrieve and print any and all CPE course certificates for successfully completed Online Grading Center print-based courses.

If faced with the need for assistance, please call Customer Support at 1.800.431.9025.

Visit [https://checkpointlearning.tr.com/OGS](https://checkpointlearning.tr.com/OGS) for more CPE information about the CPE & Training brands and solutions from the Tax & Accounting business of Thomson Reuters.
Use this roadmap to determine which steps to take in setting up your Checkpoint Learning account for your organization and staff.
About the Employee Module

With Checkpoint Learning’s Employee module, Firm Administrators can:

- Add, remove, and edit professional accounts within the organization.
- Assign regulators to track their CPE requirements.
- Produce regulator status reports to submit for license renewals and audits.
- Analyze the status of professionals meeting specific regulator requirements.

From Employee, access the Compliance Manager and the Employee Manager.

The Compliance Manager page serves as the Firm Administrator’s home page. It provides a report of selected staff’s compliance status, including compliance deadline and number of credits needed to maintain compliance.

The Employee Manager page displays selected staff and their professional account information including user name, employee title, office, department, number of CE tracking seats, whether the professional has a learning seat, and whether the firm owns the professional's account.
Compliance Manager

The Compliance Manager is the Firm Administrator's home page in Checkpoint Learning. When Checkpoint Learning is first accessed, the Compliance Manager page is the default. Any other time, click Employee and then click Compliance Manager in the left side panel.

The Compliance Manager enables you to:

- Display the employee’s compliance for accountancy and legal regulators.
- Change the password for all your employees.
- Link another employee's Checkpoint Learning account to your organization.
- Add or create employee accounts.
- Add externally sponsored activities to employee's accounts.
- Generate compliance reports

Generate Compliance Reports

Use the Compliance Manager to generate compliance reports. Export the reports to an MS Excel spreadsheet by clicking the Export to Excel button in the upper right corner of the report.

To display specific criteria in the report, add any or all of the following from in the Report Filtering section on the left side panel, and then click the Filter button:

- **Deadlines** – To display employees who have a compliance deadline in the next, 30, 60, 90, 120, or 365 days, select the deadline from the drop-down list.

- **Credits Needed** – To display employees who are compliant or have deficits, select from the drop-down list.

- **Show Incompletes** – To display the employees who have not completed answering the status report questions, and therefore lack a status report, but who appear in the Compliance Manager.

- **Public Regulator** – To display employees who have a particular accountancy or legal regulator, select a regulator from the drop-down list.

- **Administrative Groups** – To display employees assigned to a particular group, highlight the group, and then click the Filter button. To select multiple groups, press the Ctrl key when clicking names.

- **Filter Relationship** – To display employees who belong to only specific Administrative Groups, select And. To display employees who belong to any of the groups, select Or.

- **Show Members of No Groups** – To display all employees, select Yes. To display employees not attached to an administrative group, select No.

**Note:** The Compliance Manager can be set to display specific employee and regulator criteria in the Administrator’s settings.
To generate regulator compliance reports:

1. Click **Employees** from the **Main Menu**.
   
The **Employee Manager** page appears.

2. Click **Compliance Manager** from the **Global Menu** on the left side panel.
   
The **Compliance Manager** page appears.

3. In the **Compliance Status** title bar, select a regulator from the **Regulator (Categories)** drop-down list.

4. Click the **Go** button. The **Regulator Options** page appears.
   
   Each regulator view contains one or more requirements to select.

5. Select the check box next to any requirement to be displayed in the compliance report.

6. Click the **Submit** button.
   
The **Regulator Report** for the selected regulator appears.

To generate fraud compliance reports:

1. Click **Employees**.
   
The **Employee Manager** page appears.

2. Click **Compliance Manager** from the **Global Menu** on the left side panel.
   
The **Compliance Manager** page appears.

3. Click **Fraud Compliance** from the **Global Menu**.
   
The **Fraud Compliance** report appears.

**Note:** This report displays any employees who have any or all of the jurisdictions that contain a fraud requirement: California, In-Firm Requirement (ADV 1 year), and Association of Certified Fraud Examiners.

To generate ethics compliance reports:

1. Click **Employees**.
   
The **Employee Manager** page appears.

2. Click **Compliance Manager** from the **Global Menu** on the left side panel.
   
The **Compliance Manager** page appears.

3. Click **Ethics Compliance** from the **Global Menu**.
   
The **Ethics Compliance** report appears.

**Note:** This report displays any employees who have any regulators with an ethics requirement.
Employee Manager

The Employee Manager displays the firm's employees, regardless of whether they are tracking regulators. The Employee Manager displays the employee's name, user name, title, office, department, number of CE Tracking Seats (accountancy and/or law) the employee is using, whether the employee has been assigned a learning plan, whether the firm has ownership of the account, and the ability to remove the employee.

The information on the Employee Manager can be exported to MS Excel by clicking the Export to Excel button in the upper right corner of the report.

To display specific employees on the Employee Manager page, enter any of the following criteria in the Report Filtering section on the left side panel, and then click the Filter button.

- **Last Name** – To display those employees whose last name begins with specific letters, select the specific letter or letter range.

- **Relationship** – To display only those employee accounts owned by the firm, select the check box.

- **Administrative Groups** – To display employees assigned to a particular group, highlight the group, and then click the Filter button. To select multiple groups, press the Ctrl key when clicking names.

- **Filter Relationship** – To display employees who belong to only specific Administrative Groups, select **And**. To display employees who belong to any of the groups, select **Or**.

- **Show member of no groups?** – To display all employees, select **Yes**. To display employees not attached to an administrative group, select **No**.
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.
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.
Checkpoint Learning enables the administrator to edit a 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 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 a 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.
Add a Professional Designation to an Employee Account

Checkpoint Learning enables the administrator to upload the following designations to an employee's account:

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

By adding these professional designations to an employee's account, Checkpoint Learning will report automatically which Checkpoint Learning programs they complete that qualify towards meeting the professional designation requirements. It is important that the administrator enters their designation information BEFORE they complete the course.

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

To add a Professional Designation to an Employee Account, 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. Make edits to any of the following information:
   
   - **Select Professional Designation** – Select the employee's designation from the drop down menu.
   
   - **IRS PTIN Number/ ID Number** – Enter the corresponding ID number for the selected designation.

**Note:**

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

2. If the professional is 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 the professional 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”.

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4. Click Add.

5. Click the Submit button to save changes to the professional account settings.
Remove an Employee Account

Checkpoint Learning enables the administrator to remove employee accounts from their organization. Once an account is created, it exists indefinitely with the ability to be freestanding or linked from one organization to another.

To remove an employee account, do the following:

1. Click Employees.
   The Employee Manager page appears.
2. Locate the employee to be removed by doing either of the following:
   - Type the employee's last name in the Employee Search field and click the Search button.
   - Scroll to locate the employee name on the Employees Records list.
3. Do one of the following:
   - Click the Remove icon for the employee account.
   - Select the check box for one or more employees from the left hand side and click the Remove Employee button.
4. Click the OK button to remove the account.
   **Note:** For firms using the University Module for in-house registrations, the Confirm button will remove the employee from all future in-house registrations.
5. Click the Confirm button to remove the account.
   **Note:** Click the Cancel button to cancel the activity.

The employee account is removed from the Employee list.
Add an Activity to an Employee Account

Checkpoint Learning enables you to add activities (and their CPE credits) to an employee account and those regulators attached to the employee.

To add an activity to an employee account, do the following:

1. Navigate to the employee's Account Profile.
2. Click Activities from the Employees Menu on the left side panel.
   The Activities page appears.
3. Click Add Activity from the Employees Menu.
   The Add Activity page appears.
4. Complete the following fields in the Activity Details section:
   - **Title** – Enter the class title.
   - **Sponsor** – Select the class sponsor from the Select drop-down list.
     
     Note: To add a sponsor to the list, click the Add sponsor link, complete the fields, and click Submit.
   - **Format** – Select the format type from the drop-down list.
   - **Completion Date** – Enter the completion date in MM/DD/YYYY format or click the Calendar icon to select the date.
   - **Notes** – Enter notes or additional information in the text box.
5. 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 the Ctrl key to highlight and move more than one regulator at a time. Click the single arrow icon to move individual regulators. Click the double arrow icon to move all regulators.
6. Select the Use Content Distributor check box if you want Checkpoint Learning to determine which category credits will appear. Then, click the Next button.
   - If you **did not** select the Use Content Distributor check box, skip directly to step 8.
   - If you selected the Use Content Distributor check box, the Credit Distribution Assistant page appears. Continue to step 7.
7. In the **Accountancy: Credit Distribution Assistant** section, do the following for each regulator:

   - Enter the Participation Time in minutes for the appropriate Field of Study category.
   - Select Yes or No that the activity is sponsored by a NASBA Registry provider and meets NASBA Registry standards of accreditation (if applicable).
   - Select Yes or No that the activity is sponsored by a NASBA QAS provider and meets NASBA QAS standards of accreditation (if applicable).
   - Enter the sponsor’s number (NASBA registry # or QAS #) (if applicable).
   - Select the option that best describes the sponsor of the activity.
   - Select the option that best describes the style of a technologically-delivered activity (if applicable).
   - Select the option that best describes the content of the activity.
   - Enter the location of the activity.

8. Click the **Next** button.

   The **Add Activities** page appears.

   **Note:** If you did not select the **Use Content Distributor** check box in step 6 and skipped to this step, you must manually enter the category/credit amount on the **Add Activities** page.

9. Review and edit the **Attributes, Category/Credits,** and **Properties** for each regulator displayed.

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

10. Click the **Submit** button.

    The **Activity Profile** page appears.
Add an Activity to Multiple Employee Accounts

Checkpoint Learning enables the administrator to add one activity to multiple employee accounts and their respective regulators at the same time.

To add an activity to multiple employee accounts do the following:

1. Click Employees.
   The Employee Manager page appears.

2. Click Add Activities from the Global Menu on the left side panel.
   The Add Activities 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 sponsor of the class using either the Select drop-down list or the Other field.
   
   **Note:** To add a sponsor to the list, click the Add sponsor link, complete the fields, and click Submit.

   - Format – Select the format type from the drop-down list.
   - Completion Date – Enter the completion date (MM/DD/YYYY) or click the Calendar icon to select the date.
   - Notes – Enter any 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:** Double-click the regulators to move them. Press the Ctrl key to highlight and move more than one regulator at a time. Click the single arrow icon to move individual regulators. Click the double arrow icon to move all regulators.

5. In the Employees section, select the check boxes next to the desired employee names.

6. Select the Assist me with credit distribution check box to determine in which category the credits will appear. Then, click the Next button.
   - If the Assist me with credit distribution check box is not required, do not select it and skip directly to step 8.
   - If the Assist me with credit distribution check box has been selected, the Credit Distribution Assistant page appears. Continue to step 7.
7. In the **Accountancy: Credit Distribution Assistant** section on the **Credit Distribution Assistant** page, do the following for each regulator:

   - Enter the Participation Time in minutes for the appropriate **Field of Study** category.
   - Select Yes or No that the activity is sponsored by a NASBA Registry provider and meets NASBA Registry standards of accreditation (if applicable).
   - Select Yes or No that the activity is sponsored by a NASBA QAS provider and meets NASBA QAS standards of accreditation (if applicable).
   - Enter the sponsor’s number (NASBA registry # or QAS #) (if applicable).
   - Select the option that best describes the sponsor of the activity.
   - Select the option that best describes the style of a technologically-delivered activity (if applicable).
   - Select the option that best describes the content of the activity.
   - Enter the location of the activity.

8. Click the **Next** button.

   The **Add Activities** page appears.

   **Note:** If you did not select the **Assist me with credit distribution** check box in step 6, and skipped to this step. You must manually enter the credit amount on the **Add Activities** page.

9. Review and edit the **Attributes**, **Category/Credits**, and **Properties** for each regulator displayed.

10. Click the **Submit** button.

    The **Add Activities Confirmation** page appears.
Assign Courses to an Employee

Checkpoint Learning enables the administrator to assign courses to an individual employee. To assign multiple courses to multiple employees, see Assign a Learning Path.

**Note:** Assigning courses requires that the Firm has purchased the University and Learning Paths modules. If the Firm has not purchased the University and Learning Paths modules, the following topic does not apply. Contact Customer Support for more information.

To assign a course to an employee, do the following:

1. Navigate to the employee's Account Profile.
2. Click Learning Planning from the Employees Menu on the left side panel.
   - The Learning Planning page appears.
3. Click Assign Courses from the Employees Menu.
   - The Search for Courses to Assign page appears.
4. Enter the following information:
   - **Title** – Enter the name, keyword, or topic of a course.
   - **Sponsors** – Select the check box of the sponsor.
5. Click the Search button.
   - The Course Search Results page appears.
6. Enter the following information:
   - **Mandatory** – Select the check box next to the course to indicate that is mandatory for the employee.
   - **Target Date** – Enter the date by which the employee must complete the course in MM/DD/YYYY format. Or click the Calendar icon to select a date.
7. Click the Submit button.

**Note:** The administrator can also assign an in-house Firm-sponsored course by navigating to the parent course profile and then clicking Assign to Employees.
Edit an Employee's Learning Plan

Checkpoint Learning enables the administrator to edit an existing Learning Plan (a series of courses) assigned to an employee.

To edit an employee's learning plan, do the following:

1. Navigate to the employee Account Profile.
2. Click Learning Planning from the Employees Menu located on the left side panel.
   The Learning Plan page appears.
3. Click Edit Learning Plan from the Employees Menu located on the left side panel.
   The Edit Learning Plan page appears.
4. Edit any of the following information:
   - Mandatory – Select the check box to indicate the respective course is mandatory for the employee.
   - Target Date – Enter a new target date in MM/DD/YYYY format. Use the Calendar icon to select a date.
   - Status – Select the appropriate status from the drop-down list.
   - Comments – Enter or edit a comment if applicable.
5. Click the Submit button to save the changes.
Add Regulators to an Employee Account

Checkpoint Learning tracks 130 jurisdictions across the Accountancy and Legal industries including all state license requirements and several society requirements. In addition to these state and society regulators, Checkpoint Learning offers two customizable regulators for the administrator to track their employee’s CPE requirements:

- **In-Firm CPE Requirement** – Add this regulator to the employee’s account to track the total number of CPE earned in a calendar year, including an ethics requirement (if applicable) as deemed by the organization.

- **In-Firm Requirement (Adv 1 year)** – Add this regulator to the employee’s account to track the total number of CPE earned per year, including a specified number of Accounting and Auditing, Taxation, and Ethics and Fraud requirements as deemed by the organization. You can also determine the 12-month cycle (such as FY, CY) that the organization wants to track.

**Note:** For more information, check Resources to see the full list of regulators that Checkpoint Learning can track.

To add a regulator to an employee account, do the following:

1. Click Employees.
   
   The Employee Manager page appears.

2. In the Employee Search field, type the last name of the employee.

3. Click the Submit button to display the search results.

4. Click the name of the employee.
   
   The employee’s Account Profile page appears.

5. Click Status Reports from the Employees Menu on the left side panel.
   
   The Status Report Manager page appears.

6. Do the following for either industry:
   
   - Accountancy – Click Manage Regulators from the Employees Menu to add accountancy regulators to the employee’s account.
   
   - Law – Click Manage Regulators from the Employees Menu to add legal regulators to the employee’s account.

7. Select a regulator from the Regulator drop-down list on the Manage Regulators page.

8. Click the Add button.
   
   The Status Report Questionnaire page appears.

**Note:** Each status report questionnaire is specific to the regulator.
9. Answer the questions prompted in the Status Report Questionnaire to complete adding the regulator to the employee account. Click the Submit button after answering each question.

The selected regulator’s Status Report page appears.
Edit a Regulator

Checkpoint Learning enables the administrator to edit the data entered into regulators for the current reporting period only. To make changes to previous reports, contact Customer Support at 1.800.431.9025.

To edit a regulator for a professional, do the following:

1. Navigate to the employee's Account Profile.

2. Click Status Reports from the Employees Menu located on the left side panel. The Status Report Manager page appears.

3. Click the Compliance Deadline date for the desired regulator. The selected regulator's Status Report page appears.

4. Click Edit Report Profile from the Employees Menu on the left side panel.

5. Answer the questions by entering updated or correct information. Click the Submit button after each question to advance through the regulator’s questionnaire.

6. Click the Confirm button to confirm changes made to the regulator.
UnArchive Status Reports

Checkpoint Learning enables the Administrator to unarchive status reports as far back as 2010. The UnArchive link unlocks an archived report. Doing this action allows changes made to activities in the report period to be updated. Once unarchived, the status report will automatically re-lock at midnight.

Current indicates that the status report is for the current period.

Archived indicates that the status report is older. These reports are locked.

**Note:** To make changes to archived reports, first edit the activity then unarchive the report to view the changes.

To unarchive a status report, do the following:

1. Navigate to the Employee profile.
2. Click Status Reports from the left side panel.
3. Click the UnArchive link next to the report you would like unlocked.

   Once the page has refreshed, an unlocked icon displays indicating the report has been unarchived.
Remove a Regulator from an Employee’s Account

Checkpoint Learning enables the administrator to remove regulators from your employee accounts.

**Note:** Checkpoint Learning recommends setting the employee exempt from the CPE requirements instead of removing the regulator for employees’ regulators that have more than one reporting period.

To remove a regulator from an employee account, do the following:

1. Navigate to the employee’s Account Profile.
2. Click Status Reports from the Employees Menu.
   
   The Status Report Manager page appears.
3. Click Manage Regulators next to the appropriate industry from the Employees Menu.
   
   The Manage Regulators page appears.
4. Click the Delete icon for the regulator to be removed in the Enabled Regulator(s) from the (Accountancy/Legal) Industry section.
   
   A confirmation message appears.
5. Click OK to confirm removal of the regulator.
Remove an In-Progress Course

Checkpoint Learning enables the administrator to remove a course that is in-progress from an employee’s account.

To remove an in-progress course, do the following:

1. From the *Employee Manager*, click the employee’s name.
2. Click *Activities* from the *Employees* Menu.
3. Click *Pending Activities* from the *Employees* Menu.
4. Click the *Remove* icon respective to the in-progress program to be removed.
5. Click *OK*. 
Add an Attachment to an Employee

Checkpoint Learning enables the administrator to add attachments (such as certificates of completion, copies of licenses) to employee accounts.

The only document types that may be attached are PDF, MS Word, TXT, and GIF.

To add an attachment to an employee account, do the following:

1. Navigate to the employee's Account Profile.
2. Select Attachments from the Employees Menu on the left side panel.
3. Select Add Attachment from the Employees Menu.
   The Employee Profile page appears.
4. In the Upload Attachment section, do the following:
   - Attachment Name – Enter the attachment name.
   - Attachment – Click the Browse button. When the Choose File to Upload window opens, locate and select the document. Click the Open button.

5. From the Employee Profile page, click the Click to Upload button.
   The attached document appears in the Attachment section of the Account Profile page.
The administrator can view an employee status report from the Compliance Manager. When Checkpoint Learning is first accessed, the Compliance Manager is the default homepage. However, if the administrator is already working in Checkpoint Learning, the Compliance Manager can be accessed using Employees.

To view an employee status report do the following:

1. Click Employees.
   The Employee Manager page appears.
2. Click Compliance Manager from the Global Menu on the left side panel.
   The Compliance Manager page appears.
3. Enter the employee’s last name in the Employee Search field.
4. Click Search.
   The Compliance Manager page lists the employees that match your search criteria.
5. Click the employee whose status report you want to view.
   The Status Report Manager page appears.
6. Click the Compliance Deadline date for the appropriate regulator.
   The employee’s Status Report page appears.

**Note:** The Status Report displays a Requirements Summary grid at the top of the page. Each column represents a specific requirement of that jurisdiction. Details by period are broken out below the summary grid.
Navigating the Status Report

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

### Activity Information:
Date, title, sponsor, format, type, sponsor number, and credits.

### Regulator Rule Highlights:

---

<table>
<thead>
<tr>
<th>Date</th>
<th>Course / Activity</th>
<th>Sponsor</th>
<th>Format</th>
<th>Type</th>
<th>Accounting / Auditing</th>
<th>Taxation</th>
<th>Delaware Specific Ethics</th>
<th>General</th>
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### Requirements Summary: 07/01/2011 - 06/30/2013

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</tbody>
</table>

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**Rule Highlights**

**Revised Accounting/Auditing and/or Tax Requirement:**

Effective for biennial periods beginning July 1, 2011 and thereafter: As part of your total CPE requirement, you are required to earn 36.0 credit hours in accounting, auditing and/or taxation subjects. A minimum of 8.0 credit hours must be earned in accounting/auditing subjects and a minimum of 8.0 credit hours must be earned in taxation subjects. The remainder (or 20.0 credit hours) may be earned in either accounting, auditing and/or taxation subjects.
**Change an Employee's User Name**

Checkpoint Learning enables the administrator to change an employee’s user name.

**To change an employee's user name, do the following:**

1. Navigate to the employee's **Account Profile**.

2. Click **Change Username** from the **Employees Menu** located on the left side panel.
   
   The **Change Username** page appears.

3. Enter the new user name in the **Username** field.

   **Note:** It is recommended to use the employee’s email address as the Checkpoint Learning user name. 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 **Submit** button to save the changes.
Change One or All Employee Passwords

Checkpoint Learning enables the administrator to change an individual employee password or all employee account passwords.

**Note:** Passwords are not case sensitive and must be a minimum of six characters.

To edit an individual employee password, do the following:

1. Navigate to the employee's Account Profile.
2. Click Reset Password from the Employees Menu located on the left side panel.
   
   The Reset Password page appears.
3. In the Password Details section, make the following changes:
   - **New Password** – Enter the new employee password.
   - **Confirm Password** – Reenter the new employee password.
4. Click the Submit button to save changes.

To edit all employee account passwords, do the following:

1. Navigate to the Employee Manager or Compliance Manager page.
2. Click Reset Passwords from the Global Menu located on the left side panel.
3. In the Password Details section, make the following changes:
   - **New Password** – Enter the new employee password.
   - **Confirm Password** – Reenter the new employee password.
4. Click the Submit button to save changes.
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

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.
About the University Module

Checkpoint Learning's University Module enables Firms who sponsor CPE credits to:

- Track CPE
- Track registrations
- Market upcoming learning events
- Issue certificates and evaluations for in-house sponsored courses
- Store documents related to the course activity (such as sign-in sheets, pre-reading materials, and materials).

The certificates and evaluations are stored within the Course Activity Profile and are viewable at any time with Internet access. A copy of the certificate is also viewable by employees within their accounts.
Add Colleges

Checkpoint Learning enables Firm Administrators to add additional colleges (sponsors) for a University. To add a college do any or all of the following:

- Contact Product Support at 1.800.431.9025
- Click [here](https://example.com) 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 following:
  - Sponsor Name
  - Sponsor Number (If applicable)
  - Phone Number (Firm phone number can be used)
  - Email (administrator email can be used)
Add a Course

Checkpoint Learning enables you to put information about learning events and employee opportunities provided by your organization in a course.

To add courses:

1. Click University.
   The University page appears.
2. Click the appropriate sponsor from the University Menu on the left side panel.
   The Sponsor Profile page appears.
3. Click Courses from the University Menu.
   The Courses page appears.
4. Click Add Course from the University Menu.
   The Add Course page appears.
5. In the Basic Information section, enter the following information:
   - **Title** – Enter the title of the course.
   - **Course Code** – Enter an internal course number, or internal code (such as Audit, Tax, SoftSkills, Tech, Audit 100) for the course profile.
   - **Keywords** – Enter words that employees may use to search for this course. Good keywords help the search engine return more accurate results.
   - **Enabled** – Select this check box to enable your professionals to be able to view or search for courses.
6. In the Course Summary text box, enter a course summary.
7. In the Course Details text box, enter the course details.
8. In the Course Prerequisites text box, enter any course prerequisites.
9. In the Content Distribution (Minutes) section, enter the minutes of the course that cover the appropriate category or categories.
10. Click the Submit button.
   The Course Profile page appears with the new course information.

**Note:** If you do not enter text in the Course Summary, Course Details, or Course Prerequisites text boxes, their subject headings will not appear in the Course Profile. Also, it is recommended that when copying and pasting text from MS Word files, you should paste the text in Notepad or WordPad first, make edits or changes to the text, and then paste the text into the text boxes in Checkpoint Learning.
Duplicate a Course

Checkpoint Learning enables you to duplicate courses.

To duplicate a course:

1. Click University.
   The University page appears.

2. Click a sponsor from the University Menu on the left side panel.
   The Sponsor Profile page appears.

3. Click Courses from the University Menu.
   The Courses page appears.

4. Click the Duplicate icon for the course you want to duplicate.
   The Add Course page appears.

5. In the Basic Information section, enter the following information:
   - Title – Confirm or enter the title of the course.
   - Course Code – Confirm or enter an (optional) internal course number, or internal code (such as Audit, Tax, SoftSkills, Tech, Audit 100) for the course profile.
   - Keywords – Confirm or enter words that employees may use to search for this course.
   - Enabled – Select this check box if you want your professionals to view or search courses.

6. In the Course Summary text box, confirm or enter a course summary.

7. In the Course Details text box, confirm or enter the course details.

8. In the Course Prerequisites text box, confirm or enter the course prerequisites.

9. In the Content Distribution (Minutes) section, confirm or enter the minutes of the course in the appropriate category or categories.

10. Click the Submit button.
    The Course Profile page appears.

Note: If you do not enter text in the Course Summary, Course Details, or Course Prerequisites text boxes, their subject headings will not appear in the Course Profile. Also, it is recommended that when copying and pasting text from MS Word files, you should paste the text in Notepad or WordPad first, make edits or changes to the characters, and then paste the text into the text boxes within Checkpoint Learning.
Edit a Course

After you create a course, Checkpoint Learning enables you to edit the course at any time.

To edit a course:

1. Click University.
   The University page appears.

2. Click a sponsor from the University Menu on the left side panel.
   The Sponsor Profile page appears.

3. Click Courses from the University Menu.
   The Courses page appears.

4. Click the Edit icon for the course you want to edit.
   The Edit Course Profile page appears.

5. In the Edit Course Entry section, edit or confirm the following information:
   - **Title** – Confirm or enter the title of the course.
   - **Course Code** – Confirm or enter an (optional) internal course number, or internal code (such as Audit, Tax, SoftSkills, Tech, Audit 100) for the course profile.
   - **Keywords** – Confirm or enter words that employees may use to search for this course.
   - **Enabled** – Select this check box to enable your professionals to be able to view or search for courses.

6. In the Course Summary text box, confirm or enter a course summary.

7. In the Course Details text box, confirm or enter the course details.

8. In the Course Prerequisites text box, confirm or enter the course prerequisites.

9. In the Content Distribution section, confirm or enter the minutes of the course in the proper category or categories.

10. Click the Submit button.
    The updated Course Profile page appears.

Note: If you have not entered text in the Course Summary, Course Details, or Course Prerequisites text boxes, their subject headings will not appear in the Course Profile. Also it is recommended that when copying and pasting text from MS Word files, you should paste the text in Notepad or WordPad first, make edits or changes to the characters, and then paste the text into the text boxes within Checkpoint Learning.
Add Course Activities

Checkpoint Learning enables you to create course activities, which are specific scheduled or planned instances where employees can receive learning from planned courses. Course activities can be created in two different ways:

- **From a Parent Course** – You can create a course activity from a parent course. Creating a course activity in this manner adds the information you entered into the course profile and includes additional information entered in the course activity profile. Create a course activity from a parent course when you have repeat or multiple sessions of the same course and the content for that course is the same for each session.

- **As a Stand Alone Course Activity** – You can create a course activity that is not associated with a parent course. An example of when you would want to create a course activity as a stand alone is for a unique, one-time only course.

**Parent course activities** display the following information:

- Course Activity Details (Title, Sponsor, Format, Status, Date/Time, Location)
- Course Summary
- Course Details and Features
- Course Prerequisites
- Registration Details
- Travel and Accommodations
- Accreditation (Regulators, Category/Credits, Properties)
- Registration Settings (Publish Registration List, Registrant Capacity, Registration Close Date, Registrants Email Reminder, Reply Email Address)
- Authorized Groups
- Private (Professionals will not see this section)
- Default Evaluation Form (Professionals will not see this section)
- Participation Details
- Faculty
- Attachments

**Stand alone course activities** display the following information:

- Course Activity Details (Title, Sponsor, Format, Status, Date/Time, Location)
- Description
- Registration Details
- Travel and Accommodations
• Accreditation (Regulators, Category/Credits, Properties)
• Registration Settings (Publish Registration List, Registrant Capacity, Registration Close Date, Registrants Email Reminder, Reply Email Address)
• Private (Professionals will not see this section)
• Default Evaluation Form (Professionals will not see this section)
• Participation Details
• Authorized Groups
• Faculty
• Attachments

Note: When you create course activities, you can assign regulators and the credit amount to the course activity. For those jurisdictions that either do not recognize the credit or do not accept the type of CPE credit for a course activity, Checkpoint Learning automatically removes these regulators from the course activity instead of displaying a blank space.
Add a Course Activity from a Parent Course

Course activities can be created in two different ways: from a parent course or as a stand-alone course activity. This topic describes how to add a course activity from a parent course.

To create course activities from a parent course:

1. Click University.
   The University page appears.
2. Click the sponsor of the course activity from the University Menu on the left side panel.
   The Sponsor Profile page appears.
3. Click Courses from the University Menu.
   The Courses page appears.
4. Click the title of the course.
   The Course Profile appears.
5. Click Add Course Activity from the University Menu on the left side panel.
   The Add Course Activity page appears.
6. In the Basic Information section, enter the following information:
   - Title – Confirm or change the title.
   - Format – Select the course activity format from the drop-down list.
   - Identification Code – Confirm or change the identification code.
   - Parent Course – Select the parent course from the drop-down list.
   - Keywords – Confirm or edit the keywords. Separate keywords by a comma.
7. In the Dates and Times section, do the following:
   - Start Date/Time – Enter the start date and time in the format MM/DD/YYYY HH:MM AM/PM or click the Calendar icon to select a date/time.
   - End Date/Time – Enter the end date and time in the format MM/DD/YYYY HH:MM AM/PM or click the Calendar icon to select a date/time.
   - Time Zone – Select the time zone from the drop-down list.
8. In the Location section, do the following:
   - Enter address by picking up a pre-defined location – Select the location from the drop-down list. (Once you select a pre-defined location, you can overwrite the meeting room and address.)
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16. In the Participation Details text box, enter information that registrants should receive to participate in the course activity in their professional calendar. (For example: “Please bring your laptop and cable/network cords. Lunch will be served promptly at noon.”)

**Note:** Text entered in the Participation Details text box will be part of the language included in the .ics calendar attachment of the Registration Confirmation email, the Email Registrants email, and Registration Reminder email.

17. In the Authorized Group section, select the groups authorized to view the course activity. Use the single arrows to move individual groups. Use the double arrows to move all groups.

**Note:** Groups not selected are prevented from viewing the course activity on their calendar.

18. In the Accrediting Regulators section, do the following:

- **Assist me with Credit Distribution** – Select the check box to make Checkpoint Learning calculate the CPE credits in the proper category for each selected regulator.
- **Accountancy** – Select the regulator(s). Click the single arrows to add individual regulators. Click the double arrows icon to add all regulators.
- **Law** – Select the regulator(s). Click the single arrows to add individual regulators. Click the double arrows to add all regulators.

19. Click the Next button.

The Set Course Activity Credit page appears.

20. Enter the following information in the Accreditation section:

- **Attributes** – For each regulator, do the following,
  - **Type** – Confirm or select a type from the drop-down list.
  - **Provider Type** – Confirm or select a provider type from the drop-down list.
  - **Accreditation Approved** – Confirm or select the check box to indicate that the accreditation has been approved.

- **Category/Credits** – Confirm or enter the number of credits for each regulator and category.
- **Location** – Confirm or enter the location in the field.

21. Click the Create button.

The Course Activity Profile appears with the course activity details.
Note: Checkpoint Learning will automatically remove regulators from an activity when no credits apply to the regulator and/or the regulator displays a zero as the CPE credit total.
Add a Stand Alone Course Activity

Course activities can be created in two different ways: from a parent course or as a stand-alone course activity. This topic describes how to add a stand-alone course activity.

To create a stand alone course activity:

1. Click University.

   The University page appears.

2. Click the sponsor of the course activity from the University Menu on the left side panel.

   The Sponsor Profile page appears.

3. Click Course Activities from the University Menu.

   The Course Activities page appears.

4. Click Add Course Activity from the University Menu.

   The Add Course Activity page appears.

5. In the Basic Information section, do the following:

   - Title – Confirm or change the title.
   - Format – Select the course activity format from the drop-down list.
   - Identification Code – Confirm or change the identification code.
   - Parent Course – Not applicable
   - Keywords – Confirm, change or edit the keywords. Separate keywords by a comma.

6. In the Dates and Times section, do the following:

   - Start Date/Time – Enter the start date and time in the following format MM/DD/YYYY HH:MM AM or click the Calendar icon and select a date/time.
   - End Date/Time – Enter the end date and time in the following format MM/DD/YYYY HH:MM AM
   - Time Zone – Select the time zone from the drop-down list.

7. In the Location section, do the following:

   - Enter address by picking up a pre-defined location – Select the location from the drop-down list.
   - Meeting Room – Confirm or edit the meeting room.
   - Address 1 – Confirm or edit the street address.
- Add a Stand Alone Course Activity -

- **Address 2** – Confirm or edit the suite or additional address information.
- **City** – Confirm or edit the city.
- **State** – Confirm or select the state from the drop-down list.
- **Province** – Confirm or edit the province. (For foreign countries only).
- **Postal Code** – Confirm or edit the postal code.
- **Country** – Confirm or select the country from the drop-down list.

8. In the **Description** section, enter a description of the course activity:

9. In the **Travel and Accommodation Details** section, if applicable, enter travel and accommodation details in the text box. Note: Text displayed in the Registration Details text box will display in the Registration Confirmation Email and when you Email Registrants.

10. In the **Registration Details** section, if applicable, enter registration details in the text box. Note: Text displayed in the Registration Details text box will display in the Registration Confirmation Email and when you Email Registrants.

11. In the **Private (for administrators only)** section, if applicable, enter details intended for administrators only.

12. In the **Default Evaluation Forms** section, select an evaluation template from the drop-down list.

13. In the **Default Certificate Form** section, select a certificate template from the drop-down list.

14. In the **Registration Settings** section, do the following:

   - **Publish Registration List** – Select the check box to display the registration list to professionals.

   - **Registrant Capacity** – If applicable, enter the maximum number of registrants for the course activity. If you leave this field blank, then an unlimited number of employees can register for this course activity.

   - **Online Registration Close Date** – If applicable, enter the date in which registration is closed. If you leave this field blank, registration is closed to all employees.

     **Note:** If you want employees to be able to register on the day of the class, put the day after the class as the close date. The registration will close at 12:00 a.m. on the date specified in this field unless otherwise noted.

   - **Email Registrants a Reminder** – Enter the number of days before the start date that you want registrants to receive an email reminder message.

   - **Reply Email Address for Registration Reminder** – Enter or confirm the email address of the person to receive the reply email.

   - **Reply Email name for Registration Reminder** – Enter or confirm the name of the person to receive the reply email.
15. In the Participation Details text box, enter information that registrants should receive to participate in the course activity. (For example: "Please bring your laptop and cable/network cords. Lunch will be served promptly at noon.")

**Note:** Text entered in the Participation Details text box will be part of the language included in the .ics calendar attachment of the Registration Confirmation email, the Email Registrants email, and Registration Reminder email.

16. In the Authorized Group section, select the groups authorized to view the course activity in their professional calendar. Use the single arrows to move individual groups. Use the double arrows to move all groups.

**Note:** Groups not selected are prevented from viewing the course activity on their calendar.

17. In the Accrediting Regulators section, do the following:

- **Assist me with Credit Distribution** – Select the check box to make Checkpoint Learning calculate the CPE credits in the proper category for each selected regulator.

- **Accountancy** – Select the regulator(s). Click the single arrows to add individual regulators. Click the double arrows to add all regulators.

- **Law** – Select the regulator(s). Click the single arrows to add individual regulators. Click the double arrows to add all regulators.

18. Click the Next button.

The Set Course Activity Credit page appears.

19. Enter the following information in the Accreditation section:

- **Attributes** – For each regulator you selected, enter the following,
  - **Type** – Confirm or select a type from the drop-down list.
  - **Provider Type** – Confirm or select a provider type from the drop-down list.
  - **Accreditation Approved** – Confirm or select the check box to indicate that the accreditation has been approved.
  - **Category/Credits** – Confirm or enter the number of credits for each regulator and respective category.
  - **Location** – Confirm or enter the location in the field.

20. Click the Create button.

The Course Activity Profile appears with the course activity details.
**Note:** Checkpoint Learning automatically removes regulators from an activity when no credits apply to the regulator and/or the regulator displays a zero as the CPE credit total.
Duplicate a Course Activity

Checkpoint Learning enables you to duplicate course activities. When you duplicate course activities, you have the option of duplicating the following features of a course activity:

- Regulators – Duplicate the same regulators that were selected from a course activity.
- Registrants – Duplicate the registrant list from a course activity.
- Faculty – Duplicate the faculty added to a course activity.
- Schedule – Duplicate the schedule and objectives entered for a course activity.
- Host Content – Duplicate the host content or AICC/SCORM compliant on-demand host for a course activity.
- Pricing – Duplicate the pricing for a course activity.

To duplicate a course activity:

1. Navigate to the Course Activity Profile for a selected course.
   The Course Activity Profile page appears.
2. Click Duplicate from the University Menu on the left side panel.
   The Course Instance Duplicate page appears.
3. In the Duplicate options section, do the following:
   - Regulators – Select the check box to duplicate the regulators selected from the original course activity.
   - Registrants – Select the check box to duplicate the registrants from the original course activity.
   - Faculty – Select the check box to duplicate the faculty from the original course activity.
   - Schedule – Select the check box to duplicate the schedule from the original course activity.
   - Host Content – Select the check box to duplicate the host content from the original course activity.
   - Pricing – Select the check box to duplicate the pricing from the original course activity.
4. Click the Select Options button.
   The Course Instance Duplicate (Profile) page appears.
5. In the Basic Information section, enter the following information:
   - Title – Confirm or edit the title.
   - Format – Confirm or select from the drop-down list.
   - Identification Code – Confirm or enter a new identification code.
• **Parent Course** – Confirm or select from the drop-down list.

• **Keywords** – Confirm or enter new keywords.

6. In the **Dates and Times** section, enter the following information:

   • **Start Date/Time** – Confirm or enter the start date and time in the format MM/DD/YYYY HH:MM AM/PM or click the **Calendar** icon.

   • **End Date/Time** – Confirm or enter the end date and time in the format MM/DD/YYYY HH:MM AM/PM or click the **Calendar** icon.

   • **Time Zone** – Confirm or select the time zone from the drop-down list.

7. In the **Location** section, enter the following information:

   • **Enter address by picking up a pre-defined location** – Select the location from the drop-down list.

   **Note:** Once you select a predefined location, you can overwrite the meeting room and address.

   • **Meeting Room** – Confirm or enter the meeting room.

   • **Address 1** – Confirm or enter the street address.

   • **Address 2** – Confirm or enter the suite or additional address information.

   • **City** – Confirm or enter the city.

   • **State** – Confirm or select the state from the drop-down list.

   • **Province** – Confirm or enter the province.

   • **Postal Code** – Confirm or enter the postal code.

   • **Country** – Confirm or select the country from the drop-down list.

8. In the **Description** section, enter a summary of the activity.

9. In the **Travel and Accommodation Details** section, if applicable, enter travel and accommodation details in the text box.

10. In the **Registration Details** section, if applicable, enter registration details in the text box.

    **Note:** Text displayed in the Registration Details text box will display in the Registration Confirmation email and when you email registrants.

11. In the **Private (for administrators only)** section, if applicable, enter details intended for administrators only.

12. In the **Default Evaluation Forms** section, select an evaluation template from the drop-down list.
13. In the **Default Certificate Form** section, select a certificate template from the drop-down list.

14. In the **Registration Settings** section, enter the following information:

   - **Publish Registration List** – Select the check box to display the registration list.
   - **Registrant Capacity** – If applicable, enter the maximum number of registrants for the course activity. If you leave this field blank, then an unlimited number of employees can register for this course activity.
   - **Online Registration Close Date** – If applicable, enter the date in which registration is closed. If you leave this field blank, registration is closed to all employees.

   **Note:** If you want employees to be able to register on the day of the class, put the day after the class as the close date. The registration will close at 12:00 a.m. on the date specified in this field unless indicated otherwise.

   - **Email Registrants a Reminder** – Enter the number of days before the start date that you want registrants to receive an email reminder message.
   - **Reply Email Address for Registration Reminder** – Enter or confirm the email address of the person to receive the reply email.
   - **Reply Email name for Registration Reminder** – Enter or confirm the name of the person to receive the reply email.

15. In the **Participation Details** text box, enter information that registrants should receive to participate in the course activity in their professional calendar. (For example: "Please bring your laptop and cable/network cords. Lunch will be served promptly at noon.")

   **Note:** Text entered in the Participation Details text box will be part of the language included in the ics calendar attachment of the Registration Confirmation email, the Email Registrants email, and Registration Reminder email.

16. In the **Authorized Groups** section, select the groups authorized to view the course activity in their professional calendars. Use the single arrows to move individual groups. Use the double arrows to move all groups.

   **Note:** Groups not selected are prevented from viewing the course activity on their calendar.

17. In the **Accrediting Regulators** section, enter the following information:

   - **Assist me with Credit Distribution** – Select the check box to make Checkpoint Learning calculate the CPE credits in the proper category for each selected regulator.
   - **Accountancy** – Select the regulator(s). Click the single arrows to add individual regulators. Click the double arrows to add all regulators.
   - **Law** – Select the regulator(s). Click the single arrows to add individual regulators. Click the double arrows to add all regulators.
18. Click the **Next** button.

   The **Course Instance Duplicate (Credit)** page appears.

19. Enter the following information in the **Accreditation** section:

   - **Attributes**
     - **Type** – Confirm or select a type from the drop-down list.
     - **Provider Type** – Confirm or select a provider type from the drop-down list.
     - **Accreditation Approved?** – Confirm or select the check box to indicate that the accreditation has been approved.

   - **Category/Credits** – Confirm or enter the number of credits for each regulator and respective category.

   - **Location** – Confirm or enter the location in the field.

20. Click the **Create** button.

   The **Course Activity Profile** appears.
Navigate to the Course Activity Profile

There are three ways to navigate to a Course Activity Profile using University:

- Select a course from the Live Learning calendar.
- Look up the parent or Course Profile from the Courses list.
- Select a course from the list of Course Activities.

To navigate by selecting a course from the Live Learning calendar:

1. Click University.
   
The University page appears with the Live Learning calendar at the top of the page.
2. You can either scroll through the Calendar View or select the List View.
   
   - Click the Calendar View link at the top of the calendar to view a month-by-month calendar with scheduled courses.
   
   - Click the List View link at the top of the calendar to view only the dates that have scheduled courses.
3. Click the name of a course from the calendar view or list view.
   
The Course Activity Profile page appears.

To navigate by looking up the parent course profile:

1. Click University.
   
The University page appears.
2. Click the course’s sponsor from the University Menu on the left aide panel.
   
The Sponsor Profile page appears.
3. Click Courses from the University Menu on the left side panel.
   
The Courses page appears.
4. Use the next and previous arrows to scroll through the pages of courses.
5. Click a course title.
   
The Course Profile page appears.
6. In the Course Activities section, click the course name.
   
The Course Activity Profile page appears.

To navigate by viewing the list of Course Activities:

1. Click University.
   
The University page appears.
2. Click the course’s sponsor from the University Menu on the left aide panel.
   The Sponsor Profile page appears.

3. Click Course Activities from the University Menu.
   The Course Activities page appears.

4. Use the next and previous arrows to scroll through the pages of courses.

5. Click a Course Instance title.
   The Course Activity Profile page appears.
Edit a Course Activity

After you create a course activity, the information appears in the Course Activity Profile. You can edit the Course Activity Profile at any time.

To edit a course activity:

1. Navigate to the Course Activity Profile for a selected course.
   The Course Activity Profile page appears.
2. Click Edit Course Activity from the University Menu on the left side panel.
   The Edit Course Activity page appears.
3. Confirm or edit the information in the following sections:
   - Basic Information
   - Dates and Times
   - Location
   - Description
   - Travel and Accommodation Details
   - Registration Details
   - Private (for administrators only)
   - Default Evaluation Forms
   - Default Certificate Form
   - Registration Settings
   - Participation Details
   - Authorized Groups
   - Accrediting Regulators
4. Click the Next button.
   The Set Course Activity Credit page appears.
5. Edit or confirm the Attributes for each regulator:
   - Type
   - Provider Type
   - Accreditation Approved
6. Edit or confirm the Category/Credits for each regulator.
7. Edit or confirm the **Location** for each regulator.

8. Click the **Submit** button.

   The updated **Course Activity Profile** page appears.
Enable or Disable a Course Activity

Checkpoint Learning enables you to control which course activities appear on your Live Learning calendar. Course Activities that are enabled appear on the Live Learning calendar. Disabled course activities will not display on the Live Learning calendar.

**To enable or disable a course activity:**

1. Click **University**.
   - The **University** page appears.
2. Click a sponsor from the **University Menu** on the left side panel.
   - The **Sponsor Profile** page appears.
3. Click **Course Activities** from the **University Menu**.
   - The **Course Activities** page appears.
4. Click the **Enable/Disable** icon 🔄 to toggle between enabling and disabling course activities.
   - Course activity titles that appear in gray are disabled.
   - Course activity titles that appear in blue are enabled.
Add an Attachment to a Course Activity

Checkpoint Learning enables administrators to add attachments (such as rosters, materials, and course descriptions) to course activity profiles.

The only document formats that are acceptable for uploading are PDF, MS Word, MS Excel, TXT, and GIF.

To add an attachment to a course activity, do the following:

1. Navigate to the Course Activity Profile for a selected course.
   The Course Activity Profile page appears.
2. Click Add Attachment from the University Menu on the left side panel.
   The Course Activity Attachment Upload page appears.
3. In the Upload Attachment section, enter the following information:
   - Attachment Name – Enter a name for the attachment (such as Instructor Biography).
   - Attachment – Click the Browse button. In the File Upload window, locate and select the attachment, and then click Open.
4. Click the Click to Upload button.
   The Course Activity Profile page appears with the uploaded attachment listed in the Attachments section.

Note: You can rename or remove the attachment as needed by clicking the appropriate links.
Add Faculty to a Course Activity

Checkpoint Learning enables you to add faculty to a course activity. There are three types of faculty that can be added:

- **Internal Faculty** – Currently has a Checkpoint Learning account within your organization. Once added to a course activity, internal faculty can be issued CPE credit and certificates as well as receive registration and other email reminders.

- **Independent Faculty** – Currently has a Checkpoint Learning account outside your organization. Once added to a course activity, internal faculty can be issued CPE credit and certificates as well as receive registration and other email reminders.

- **External Faculty** – Does not have a Checkpoint Learning account.

*Note:* External faculty will not receive email reminders, CPE credit, or electronic certificates.

To add internal faculty:

1. Navigate to the [Course Activity Profile](#) for a selected course.
   
   The Course Activity Profile page appears.

2. Click Faculty from the University Menu on the left side panel.
   
   The Faculty page appears.

3. In the Add Faculty from Employee Account section, enter the last name of the employee in the Search Employees field, and then click the Search button.

4. From the employee list, select the check box for the employee you want to select.

5. Click the Add Faculty button.

   The selected employee is added to the Faculty List on the Faculty page.

To add independent faculty:

1. Navigate to the [Course Activity Profile](#) for a selected course.

   The Course Activity Profile page appears.

2. Click Faculty from the University Menu on the left side panel.

   The Faculty page appears.

3. In the Add Faculty from Required Professional section, enter the Checkpoint Learning user name of the faculty in the Find Professional field, and then click the Search button.

4. In the Organization field, enter the organization name of the faculty.

5. In the Location field, enter the faculty’s organization location.

6. In the Biography URL field, copy and paste the URL link to the faculty’s biography.
7. Select the **Do you want to send notification to this faculty member** check box if applicable.

8. Click the **Add** button.

The employee is added to the **Faculty List** on the **Faculty** page.

**To add external faculty:**

1. Navigate to the [Course Activity Profile](#) for a selected course.

   The **Course Activity Profile** page appears.

2. Click **Faculty** from the **University Menu** on the left side panel.

   The **Faculty** page appears.

3. In the **Add Non-Employee Faculty** section, do the following:

4. In the **Name** field, enter the first and last name of the faculty.

5. In the **Organization** field, enter the organization name of the faculty.

6. In the **Location** field, enter the faculty’s organization location.

7. In the **Biography URL** field, copy and paste the URL link to the faculty’s biography.

8. Click the **Add** button.

   The employee is added to the **Faculty List** on the **Faculty** page.
Remove Faculty from a Course Activity

After you add faculty to a course activity, you can remove the faculty at any time using the steps below.

To remove faculty from a course activity:

1. Navigate to the Course Activity Profile for a selected course.
   
   The Course Activity Profile page appears.

2. Click Faculty from the University Menu on the left side panel.
   
   The Faculty page appears.

3. In the Faculty List section, click the Delete icon next to the faculty name you want to remove.
Add, Edit, Delete Pricing for a Course Activity

Checkpoint Learning enables you to list the costs associated with a course activity.

To add pricing to a course activity:
1. Navigate to the Course Activity Profile for a selected course.
   The Course Activity Profile page appears.
2. Click Pricing from the University Menu on the left side panel.
   The Pricing page appears.
3. In the Add Pricing Item section, do the following:
   - Price Description – Enter the description of the cost.
   - Price – Enter the amount (for example 25.00).
4. Click the Add button.
   The pricing for the course activity is added to the Pricing section on the Pricing page.

To edit or delete pricing for a course activity:
1. Navigate to the Course Activity Profile for a selected course.
   The Course Activity Profile page appears.
2. Click Pricing from the University Menu on the left side panel.
   The Pricing page appears.
3. In the Pricing section, do the following:
   - Edit – Click the Edit icon to edit the description or price, then click the Update button.
   - Delete – Click the Delete icon to delete the price and description. When you see the
     confirmation message, click OK to confirm the deletion.
Email Invitations for a Course Activity

Checkpoint Learning enables you to send email invitations to the employees within your organization.

To email invitations for a course activity:

1. Navigate to the Course Activity Profile for a selected course.
2. Click Email Invitations from the Course Activity Management menu on the left side panel.
   The Send Invitations page appears.

   **Note:** Click the up and down arrows to sort the activities by title, location and time.

3. In the Invitation Details section, do the following:
   - **Sender's Email Address** – Confirm or enter the sender’s email address.
   - **Sender's Name** – Confirm or enter the sender’s name.
   - **CC** – Enter the email address of those you want to receive a copy of the invitation.
   - **Subject** – Enter a subject heading for the invitation email.
   - **Email Receipt to Sender** – Select the check box to send a receipt to the sender.

4. In the Optional Message text box, enter any additional information to be included in the email.

5. In the Recipient List section, select the check box for each recipient you want to receive the invitation.

6. Click the Send Email button.
   The Email Invitations page appears with the email notification status.
Email an Invitation for Multiple Course Activities

Checkpoint Learning enables you to send an email invitation for one or more course activities at a time.

To email an invitations for multiple course activities:

1. Click University.
   The University page appears.
2. Click a college or sponsor from the University Menu on the left side panel.
   The Sponsor Profile page appears.
3. Click Course Activities from the University Menu.
   The Course Activities page appears.
4. Select the check box for each course activity you want to include in an invitation.
5. Click the Send Email Invitations button.
   The Send Invitations (Select Recipients) page appears.

   **Note:** Click the up and down arrows to sort the activities by title, location and time.

6. In the Invitation Details section, enter the following information:
   - **Sender's Email Address** – Enter or confirm the sender's email address.
   - **Sender's Name** – Enter or confirm the sender's name.
   - **CC** – Enter the email address of the person you want to receive a copy of the invitation.
   - **Subject** – Enter the subject heading of the invitation.
   - **Email Receipt to Sender** – Select Yes or No to send a receipt of the invitation to the sender.

7. In the Optional Message text box, enter any additional information to be included in the email.
8. In the Recipient List section, select the check box for each employee you want to receive the invitation.
9. Click the Send Email button.
   The Send Invitations (Confirmation) page appears with the email notification status.

   **Note:** You can also select Course from the University Menu to send an invitation to multiple courses from the Course Profile page. Navigate to the Course Profile page, and then follow steps 4 – 9 above.
Add Schedules and Objectives to a Course Activity

Checkpoint Learning enables you to add schedules and objectives to course activities. With this feature, you can use the dynamic evaluation template (you can add additional questions related to the course activity to your evaluation) and itemize what will be covered during a course activity. After creating the schedule and objectives, the schedule and objectives can be evaluated and duplicated for other course activities.

Note: To evaluate schedules and objectives, ensure you have the Dynamic Evaluation template added to your account. Contact Customer Support at 1.800.431.9025 for more information.

To add schedules and objectives to a course activity:

1. Navigate to the Course Activity Profile for a selected course.
   
   The Course Activity Profile page appears.

2. Click Schedule/Objectives from the University Menu on the left side panel.
   
   The Schedule/Objectives page appears.

3. In the Add Schedules/Objectives section, enter the following information:
   
   - **Rank** – Enter a number to rank the schedule or objective.
     
     Note: Numbers 1 – 9 are recommended. Roman numerals will not order properly.

   - **Item Description** – Enter the schedule or objective in the text box.

4. Click the Add button.
   
   The new entry is added to the Schedules/Objectives list.

To edit schedules and objectives:

1. Navigate to the Course Activity Profile for a selected course.

   The Course Activity Profile page appears.

2. Click Schedule/Objectives from the University Menu on the left side panel.

   The Schedule/Objectives page appears.

3. In the Schedules/Objectives section, do either of the following:
   
   - **Edit** – Click the Edit icon and modify the rank or item description, and then click the Update button.

   - **Delete** – Click the Delete icon to remove the schedule or objective from the course activity.
Link Hosted Content to a Course Activity Profile

Checkpoint Learning allows online content (AICC and SCORM compatible only) to connect to course activity profiles. Professionals can launch these online courses and upon completion, will receive applicable credit. Administrators can select whether an evaluation is provided to the Professional upon completion, as well as set a reminder on the University to issue certificates for completion of online courses to Professionals.

**Note:** To use the link to hosted content, both the University and Open Platform modules must be purchased.

To link hosted content to a course activity profile, do the following:

1. Navigate to the course activity profile that you want to link content to.
2. On the left hand navigation pane, click **Link Hosted Content** under Course Activity Profile.
3. Select the host for the content to be linked from the Host dropdown menu under the Select Content Host section. If the host selected is Checkpoint Learning, refer to Option 1 below and if the host selected is LearnLive, refer to Option 2.

**Option 1:** If Checkpoint Learning has been selected as the host in Step 3, do the following:

i. In the **Configure Post-Event Actions** section, select the **Send Default Evaluation** checkbox to have default evaluations sent to the professional’s registered email address upon completion of the program.

ii. Select the **Issue Certificates Reminder** checkbox to have reminders sent to the registered firm administrator email address upon completion of the program by a professional.

iii. Click the **Select** button

iv. In the **Upload Course File** section, select the course format from the **Content Format** dropdown menu.

**Note:** The accepted content formats include SCORM 1.2, SCORM 2004 2nd edition and AICC Level 1.

v. Click the **Browse** button and navigate to the course file saved on the computer.

vi. Select the course file and click the **Open** button in the Choose File to Upload dialog box. The file location is displayed in the **Course Content File** field on the Checkpoint Learning **Course Content** page.

vii. Click the **Click to Upload** button. On completion of the upload process, the Course Content page is refreshed and a message indicating successful upload of the file is displayed above the Course Activity Details section.

**Note:** The system may take 5-15 minutes (or more) to upload the file from the computer depending on the size of the course file. Do not refresh the page and allow the page to refresh itself.

viii. Click the **Submit** button. On completion of the import, the Course Content page is refreshed and a message indicating successful import of the course is displayed above the Course Activity Details section.
An email confirming successful import of the course is sent to the registered firm administrator email address.

**Note:** Once the e-course content has been linked to the course activity profile, the **E-Learning** field in the **Course Activity Details** section on the **Course Activity Profile** page displays information suggesting that the content is linked from a third party host.

**Option 2:** If **LearnLive** has been selected as the host in Step 3, do the following:

i. In the **Configure Post-Event Actions** section, select the **Send Default Evaluation** checkbox to have default evaluations sent to the professional’s registered email address upon completion of the program.

ii. Select the **Issue Certificates Reminder** checkbox to have reminders sent to the registered firm administrator email address upon completion of the program by a professional.

iii. Click the **Select** button. The **Link Hosted Content** page is refreshed and displays additional information.

iv. In the **Content Selection Criteria** section, select the appropriate **Content Type**.

v. Click **Search**.

vi. Navigate through the list displayed in the **Content** field below the **Select Linked Content** section and select the online course file.

vii. Click the **Submit** button.

Notice that the **E-Learning** field in the **Course Activity Details** section displays the LearnLive host and the specific online course ID.

**Note:** The course history of a professional will not display any change made to the course details after the course has been linked to the course activity profile. Make sure to add the e-course file as the final step after confirming that all related information (course title, description, accreditation information, etc.) is complete and accurate.
Add Registrants

Checkpoint Learning enables you to add registrants to a course activity.

**Note:** Once a registrant is added, they are not notified of the registration. You must email the registrant in order to notify them of their registration status.

To add registrants to a course activity:

1. Navigate to the Course Activity Profile for a selected course.
   - The Course Activity Profile page appears.
2. Click Registration from the Course Activity Management menu on the left side panel.
   - The Registration page appears.
3. Click Add Registrants from the Course Activity Management menu.
   - The Add Registrants page appears.
4. Select the check box of each employee registrant you want to add.
5. Click the Add Registrants button.
   - The employee is added to the Registration list (or the Waitlist) on the Registration page.

**Note:** If the capacity of a course is not met and there is a waitlist, you will be sent an email notification when a seat is released on a roster.

**Note:** If you have a registrant who has a Checkpoint Learning account but is not in the organization, type the registrant's username in the Username text box under the Add External Checkpoint Learning User field and click the Add button.
Move Professionals from the Waitlist to the Registrant List

Checkpoint Learning will automatically create a waitlist when the capacity is set and met in the course activity profile Registrations section. Administrators are notified when a waitlist is set and an opening appears on the roster. Administrators can move the professionals from the waitlist to the roster by doing the following:

1. Navigate to the Course Activity Profile for a selected course.
2. Click Registration from the left side panel.
3. In the Waitlist section, select the checkbox of the professionals and click the Register Selected button.

The selected professionals are on the registration list.

**Note:** Checkpoint Learning does not automatically notify learners that they have been moved from the waitlist to the roster. To notify professionals, follow the steps in Email Registrants.
Email Registrants

Checkpoint Learning enables you to send a custom email message to multiple registrants.

To email registrants:

1. Navigate to the Course Activity Profile for a selected course.
2. Click Registration from the Course Activity Management menu on the left side panel.
   The Registration page appears.
3. Click Email Registrants from the Course Activity Management menu.
   The Email Faculty & Registrants page appears.
4. In the Message Details section, enter the following information:
   - **Sender's Email Address** – Confirm or enter the sender's email address.
   - **Sender's Name** – Confirm or enter the sender's name.
   - **CC** – Enter the email address of the person you want to receive a copy of the email. To enter multiple email addresses, separate the email addresses by a comma.
   - **Subject** – Enter a subject heading.
   - **Email Receipt to Sender** – Select Yes or No to email a receipt to the sender.
   - **Send Registration List to Faculty** – Select Yes or No to email the registration list to the faculty assigned to the course activity.
   
   **Note**: This applies only to faculty who have a current Checkpoint Learning account. External faculty will not receive emails.

   - **Attach ICalendar** – Select Yes or No to attach a calendar appointment for the registrant to add to their personal calendars.
   
   **Note**: When sending a cancellation email, the ICalendar attachment becomes an attachment to remove the calendar appointment from the registrants personal calendar.

   - **Cancellation Notice** – Select Yes or No to indicate the course activity is a cancellation.
   
   **Note**: When notifying your professionals that the course activity is a cancellation, select Yes to attach the Icalendar attachment so that professionals can remove the activity from their personal calendars.

5. In the Custom Message section, enter a custom message in the text box.
6. In the Required Network Professional Faculty section, select the check box for the faculty you want to receive an email listing the registrants and course activity information.
7. In the Registrants section, select the check box of the registrants to receive the email.

8. Click the Send Email button.

   The Email Registrants Confirmation page appears.
Print Sign-sheets for a Course Activity

Checkpoint Learning enables you to print sign-in sheets for course activities. You can pick a sign-in sheet template or use the standard sign-in sheet template. Contact Customer Support at 1.800.431.9025 for more information.

To print a sign-in sheet:

1. Navigate to the Course Activity Profile for a selected course.
   - The Course Activity Profile page appears.
2. Click Forms from the Course Activity Management menu on the left side panel.
   - The Forms page appears.
3. In the Sign-In Sheets section, enter the following information:
   - Industry – Select Law or Accountancy from the drop-down list.
   - Regulator – Select a regulator to display the credits for the course activity.
   - Note: The NASBA Registry and PCAOB regulators are widely accepted in the accounting industry by most states and societies.
   - Form Template – Select a template from the drop-down list.
   - Note: The template Selected Regulator, All Registrants is recommended. Contact Customer Support at 1.800.431.9025 for template options.
4. Click the Generate Form button.
   - The Official Record of Attendance page appears.
5. Click Print from your Internet browser tool bar.
Print a Certificate for a Course Activity

Checkpoint Learning enables you to print certificates for a course activity attendees.

**Note:** Printing certificates for a course activity is best used for external participants without a Checkpoint Learning account. For internal attendees, use the Certificates feature in the Course Activity Management section of the Course Activity Profile page.

To print certificates for a course activity:

1. Navigate to the [Course Activity Profile](#) for a selected course.
   - The Course Activity Profile page appears.
2. Click Forms from the Course Activity Management menu on the left side panel.
   - The Forms page appears.
3. In the Certificates section, select a certificate template from the drop-down list.
4. Click the Generate Form button.
   - The Certificate of Attendance (or Certificate of Completion) appears.
5. In the Affirmation section (or Acknowledgement section), type the name of the attendee in the appropriate certificate field.
6. Click Print from your Internet browser toolbar.
Print Evaluations for a Course Activity

Checkpoint Learning enables you to print evaluations for a course activity.

**Note:** Printing evaluations for a course activity is best used for external participants. For internal participants, use the Evaluations feature in the Course Activity Management section of the Course Activity Profile page.

To print evaluations for a course activity:

1. Navigate to the Course Activity Profile for a selected course.
   
   The Course Activity Profile page appears.

2. Click Forms from the Course Activity Management menu on the left side panel.
   
   The Forms page appears.

3. In the Evaluations section, select an evaluation template from the drop-down list.

4. Click the Generate Form button.
   
   The selected Evaluation page appears.

5. Click Print from your Internet browser tool bar.
Print Affirmations for a Course Activity

Checkpoint Learning enables you to print affirmations of completion for course activities.

**Note:** Affirmations are used only for the states of New York and Illinois.

**To print an affirmation of completion for a course activity:**

1. Navigate to the [Course Activity Profile](#) for a selected course.
   - The Course Activity Profile page appears.
2. Click **Forms** from the Course Activity Management menu on the left side panel.
   - The Forms page appears.
3. In the Affirmations section, select a template from the drop-down list.
4. Click the Generate Form button.
   - The Affirmation of Completion page appears.
5. Click **Print** from your Internet browser tool bar.
Print Name Tents Tags and Miscellaneous Forms

Checkpoint Learning enables you to print the following miscellaneous forms:

- Name Tents
- Name Tents (Avery 5305)
- Name Tags (Avery 5392)
- Florida MCLE Form
- Illinois MCLE Form 1
- Missouri MCLE Form 6
- Virginia MCLE Form 4
- Wisconsin MCLE Form 2

To print a miscellaneous form:

1. Navigate to the Course Activity Profile for a selected course.
   
   The Course Activity Profile page appears.

2. Click Forms from the Course Activity Management menu on the left side panel.
   
   The Forms page appears.

3. In the Miscellaneous Forms section, select a template from the drop-down list.

4. Click the Generate Form button.
   
   The miscellaneous form appears.

5. Click Print from your Internet browser tool bar.
Send an Electronic Evaluation to Registrants

Checkpoint Learning enables you to send course activity evaluations electronically. The recipients receive an Evaluation Request email with a hyperlink that launches the evaluation. Once the recipient completes the evaluation, the data is stored within the course activity profile.

Note: All evaluation data collected is 100 percent anonymous. You can send electronic evaluations only to internal professionals and those external professionals that have provided their Checkpoint Learning user name and are included as a registrant for the selected Course Activity Profile.

To send an electronic evaluation to registrants:

1. Navigate to the Course Activity Profile for a selected course.
   
   The Course Activity Profile page appears.

2. Click Evaluations from the Course Activity Management menu on the left side panel.
   
   The Evaluations page appears.

3. In the Select Active Evaluation Form section, select the appropriate evaluation form template from the drop-down list.

4. Click the Change button.

5. In the Active Evaluation Form Data Entry section, click Send Online Evaluation Request.
   
   The Send Evaluation Request page appears.

6. In the Evaluation Request Details section, enter the following information:
   
   - **Sender's Email Address** – Confirm or enter the sender’s email address.
   
   - **Sender's Name** – Confirm or enter the sender’s name.
   
   - **CC** – Enter the email address of the person you want to receive a copy of the evaluation request.
   
   - **Subject** – Enter a subject heading.
   
   - **Email Receipt to Sender** – Select Yes or No for the sender to receive an email receipt of the evaluation request.

7. In the Optional Message section, type any additional message in the text box.

8. In the Select Registrants section, select the check box for each recipient to receive an electronic evaluation.

9. Click the Send Evaluation Request button.
   
   The Send Evaluation Request Confirmation page appears with the email notification status.
View Electronically Collected Evaluation Data for a Course Activity

Checkpoint Learning enables you to send evaluations electronically to attendees of a course activity. As attendees complete the electronic evaluation form, the data is collected within the Course Activity.

To view evaluation data collected for a course activity:

1. Navigate to the Course Activity Profile for a selected course.
   
   The Course Activity Profile page appears.

2. Click Evaluations from the Course Activity Management menu on the left side panel.
   
   The Evaluations page appears.

3. In the Manage Evaluations section, do the following:
   
   - Starting no earlier than – Enter the date that want to collect evaluations from (example: 1/1/2008).
   - Starting no later than – Enter the date that you want to collect evaluations to (example: 1/1/2009).

4. Click the Submit button.

5. In the Evaluations section, do either of the following:
   
   - View Summary – Click the link to view a summary of all evaluations collected.
   
   - List Evaluations – Click the link to view an itemized list of each evaluation collected. The Evaluations List page appears. In the Time of Submission column, click the evaluation link to view the evaluation data.
Email, View, or Print Electronically Issued Certificates for a Course Activity

Checkpoint Learning enables you to view and print the electronic certificates issued for a course activity.

To view or print electronically issued certificates for a course activity:

1. Navigate to the Course Activity Profile for a selected course.
   
   The Course Activity Profile page appears.

2. Click Certificates from the Course Activity Management menu on the left side panel.
   
   The Certificates page appears.

3. In the Issue Certificates section, select a certificate template from the drop-down list.

4. You can either click the Issue button to issue the certificate or skip to the next step.

5. In the Issued Certificates by Template section, do one of the following:

   - View Certificate List – Click the View icon to view the list of electronic certificates issued for a course activity.

   - Email Certificates – Click the Email icon to email an electronic certificate to the attendees of a course activity.

   - Print Certificate – Click the Print icon to print electronically issued certificates of a course activity.
Issue Electronic Certificates

Checkpoint Learning enables you to issue certificates electronically. These certificates are stored within the course activity profile as well as in the employee’s account.

**Note:** For those instances where attendees earned different amounts of CPE credit, issue certificates to those persons separately.

**To issue electronic certificates:**

1. Navigate to the [Course Activity Profile](#) for a selected course.
   
   The Course Activity Profile page appears.

2. Click [Certificates](#) from the Course Activity Management menu on the left side panel.

   The Certificates page appears.

3. In the Issue Certificates section, select a certificate template from the drop-down list.

4. Click the Issue button.

   The Issue Certificates page appears.

5. In the Registrants section, select the check box for each recipient to receive a certificate.

6. Click the Next button.

   The Certificate of Completion page appears.

7. In the Details section, confirm the date of completion, or click the Calendar icon and select the correct date.

8. In the selected regulator’s Accreditation section, confirm or edit the credit totals and categories.

9. Click the Submit button.

   The Certificates Lists page appears with a list of issued certificates.

**Note:** This list can be exported to an Excel spreadsheet by clicking the Export to Excel link in the Issued Certificates title bar.
Issue Electronic Certificates to Faculty

Checkpoint Learning enables you to issue certificates electronically to Faculty so long as they have a Checkpoint Learning account. These certificates are stored within the course activity profile as well as in the faculty’s Checkpoint Learning account.

To issue electronic certificates to faculty:
1. Navigate to the Course Activity Profile for a selected course.
   The Course Activity Profile page appears.
2. Click Certificates from the Course Activity Management menu on the left side panel.
   The Certificates page appears.
3. In the Issue Certificates section, select a certificate template from the drop-down list.
4. Click the Issue button.
   The Issue Certificates page appears.
5. In the Registrants section, click the Faculty link in the title bar.
6. In the Select Format for Faculty section, select Teaching (CE Panelist) or Teaching (CE Presenter) from the drop-down list.
7. In the Faculty section, select the check box for each faculty to receive a certificate.
8. Click the Next button.
   The Certificate of Completion page appears.
9. In the Details section, confirm the date of completion or click the Calendar icon and select the correct date.
10. In the selected regulator’s Accreditation section, confirm or edit the credit totals and categories.
11. Click the Submit button.
   The Certificate Lists page appears with a list of issued certificates.

Note: This list can be exported to an Excel spreadsheet by clicking the Export to Excel link in the Issued Certificates title bar.
Give Credit for Attending a Course Activity (Issue a Direct Deposit)

Checkpoint Learning enables you to issue credit directly into your employee's accounts for attending in-house or Firm-sponsored course activities within your Firm's University.

**Note:** For those instances where some attendees earned different CPE amounts, issue direct deposits for those attendees separately. For example, for those attendees who earned four CPE credits, issue one direct for only those attendees who earned four CPE credits.

**To issue credit for attending a course activity:**

1. Navigate to the [Course Activity Profile](#) for a selected course.
   
   The [Course Activity Profile](#) page appears.

2. Click [Direct Deposit](#) from the [Course Activity Management](#) menu on the left side panel.
   
   The [Direct Deposit](#) page appears.

3. In the Registrants section, select the check box for the attendees that you want to give credit for attending.

4. Click the Next button.
   
   The [Direct Deposit](#) page appears.

5. In the Completion Date section, confirm or enter the completion date of the course activity (format MM/DD/YYYY). Or you can click the Calendar icon and select a date.

6. In the Accreditation section, enter or confirm the following fields for the displayed regulators:

   - **Type** – Confirm or select the type of course activity from the drop-down list.
   
      - **Provider Type** – Confirm or select the provider type for the course activity from the drop-down list.
   
   - **Accreditation Approved** – Confirm or select the check box to indicate that accreditation is approved for the course activity.
   
   - **Category/Credits** – Confirm or enter the number of credits in the respective regulator category for the course activity.
   
   - **Sponsor #** – Confirm or enter the sponsor number for each displayed regulator (if applicable).

7. Click the Submit button.

   The [Direct Deposit Confirmation](#) page appears.
**Issue Credit to Faculty**

Checkpoint Learning enables you to issue credit for instructing course activities to Faculty in your organization that have Checkpoint Learning accounts, as well as faculty outside your organization that have Checkpoint Learning accounts.

**Note:** For those instances where some faculty earned a different amount of CPE credits for instructing, issue credit for those instructors separately. If the instructor participated for a portion of the Course Activity, issue two (2) certificates, one (1) as an attendee or participant and one (1) as a faculty.

To issue credit to faculty:

1. Navigate to the [Course Activity Profile](#) for a selected course.
   
   The Course Activity Profile page appears.

2. Click Direct Deposit from the Course Activity Management menu on the left side panel.
   
   The Direct Deposit page appears.

3. In the Registrants section, click the Faculty link in the title bar.
   
   The Direct Deposit (Faculties) page appears.

4. In the Select Format for Faculty section, select Teaching (CE Panelist) or Teaching (CE Presenter) from the drop-down list.

5. In the Faculty section, select the check box for each faculty to receive credit.

6. Click the Next button.
   
   The Direct Deposit Content Distribution (Faculties) page appears.

7. In the Content Distribution (Minutes) section, enter the following information:
   
   - Presentation Time – Confirm or enter the number of minutes the faculty spent on presenting.
   - Preparation Time – Confirm or enter the number of minutes the faculty spent on preparation.

8. Click the Next button.
   
   The Direct Deposit (Faculties) page appears.

9. In the Completion Date section, confirm or enter the date of completion for the course activity in the format MM/DD/YYYY. Or click the Calendar icon to select a date.
10. In the **Accreditation** section, enter or confirm information in the following fields for the regulators:

   - **Attributes** – Confirm or select the following information:
     - **Type** – Confirm or select the type of course activity from the drop-down list.
     - **Provider Type** – Confirm or select the provider type for the course activity from the drop-down list.
     - **Accreditation Approved** – Confirm or select the check box to indicate that accreditation is approved for the course activity.

   - **Category/Credits** – Confirm or enter the number of credits in the respective regulator category for the course activity.

   - **Sponsor #** – Confirm or enter the sponsor number for the appropriate regulators.

11. Click the **Submit** button.

   The **Direct Deposit Confirmation (Faculties)** page appears with the direct deposit status.
Run University Reports

Checkpoint Learning reports on the colleges, course activities, registrations, direct deposits and other features within the University Module.

To run course reports, do the following:

1. Click University.
2. Click the sponsor name from the University Menu on the left hand panel.
3. Click Courses from the University Menu.
4. Click Export to Excel for a report on the college's course list.

To run reports of a sponsor's course activities list, do the following:

1. Click University.
2. Click the sponsor name from the University Menu on the left hand panel.
3. Click Course Activities from the University Menu.
   The page displays a list of all course activities related to that sponsor profile.
4. Click Export to Excel to directly export the list.
   You can also apply Regulators to filter the Course activities list before exporting it.
5. From the Course Instances status bar, select a regulator from the Regulator (Categories) drop down list.
6. Click Go. The Regulator options page opens.
7. Select the check box next to any requirement to be displayed in the course activities list you want to export.
   The Course activities list for the selected regulator appears.
8. Click Export.

To run course activity reports, do the following:

1. Click University.
2. Click the sponsor of the course activity from the University Menu on the left hand panel.
3. Click Course Activities from the University Menu.
4. Click the title of a course under Course Instances.
5. Go to Course Activity Management on the left hand panel under University Menu. Do any of the following:

The following reports are run from within a Course Activity Profile.

To run a report of employees registered for a Course Activity Profile, do the following:

1. Click Registration from the Course Activity Management menu.
2. Click the Export to Excel link located to the right of the Registration List bar.
To run a report of employees evaluations, do the following:

1. Click **Evaluations** from the **Course Activity Management** menu.
2. Scroll down and click the **View Summary** link under the **Evaluations** bar.
3. Click the **Export to Excel** link located to the right of the **Course Activity Details** bar.

**Note:** Only evaluation summaries can be exported. Reports cannot be run on the Evaluation themselves.

To run a report of employees certificates, do the following:

1. Click **Certificates** from the **Course Activity Management** menu.
2. Scroll down and click the view certificates list icon 📌 in the **Action** column under the **Issued Certificates by Template** bar.
3. Click the **Export to Excel** link located to the right of the **Issued Certificates** bar.

To run a report of employees direct deposit, do the following:

1. Click **Direct Deposit** from the **Course Activity Management** menu.
2. Click the **Export to Excel** link located to the right of the **Course Activity Details** bar.

**Note:** Go to the **Filter Employee List** section on the left hand panel, select the filtering criteria and click **Filter** to filter the results or **Clear** to clear the filtering parameters.
Perform a Registration Search

Checkpoint Learning provides a list of employee registrations and direct deposits. This list can be sorted by date, employee, course title and direct deposits received.

To perform a registration search, do the following:

1. Click University.
2. Scroll down and click the Registrations Search link from the left hand pane under the Search Course Activities section.
3. Do any or all of the following, then click the Search button.
4. In the Course Activity Criteria section, select the following information:
   - Course Activity Status – Select the appropriate radio button
   - Formats – Select the course activity format from the list.
   - Sponsors – Select the appropriate sponsor from the list.
   - Starting no earlier than/Starting no later than – Select the calendar icon to choose date parameters.
5. In the Registrant Criteria section, do the following:
   - Administrative Groups – Scroll to select administrative groups.
   - Group Relationship – Click the appropriate radio button to select group relationship.
   - Show members of no groups – Click the appropriate radio button to select member of group.
   - Has Activity Status – Click the appropriate radio button to select activity status.
6. The Registrations Search Results page displays the:
   - Start Date – Indicates the date a particular course activity was started.
   - Registrant – Indicates the name of the employee.
   - Username – Indicates the email address of the employee.
   - Course Activity Title – Indicates the course activity or program title.
   - College – Indicates the provider of the course.
   - Format – Indicates the format or mode in which a course was offered.
   - Direct Deposit – Indicates the employee was registered and received a direct deposit.
   - Indicates the employee was on the roster, but did not receive a direct deposit.
7. To export this report in excel format, click the **Export to Excel** link at the top right hand corner, under the sponsor name.
How to Create Professional Accounts and Assign to Subscription Package Seats

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. Review this video tutorial to learn how to add a new Checkpoint Learning user.

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.
How to change passwords for Professional Accounts

Checkpoint Learning enables the administrator to change an individual employee password or all employee account passwords.

**Note:** Passwords are not case sensitive and must be a minimum of six characters.

To edit an individual employee password, do the following:

1. Navigate to the employee's [Account Profile](#).
2. Click **Reset Password** from the **Employees Menu** located on the left side panel.
   
   The **Reset Password** page appears.
3. In the **Password Details** section, make the following changes:
   
   - **New Password** – Enter the new employee password.
   
   - **Confirm Password** – Reenter the new employee password.
4. Click the **Submit** button to save changes.
How to Assign an existing Professional Account to a Subscription Package Seat

To assign an existing professional account to a subscription package seat, do the following:

1. Click University to view the Subscription Package Seat.
2. Click the Subscription Package from the left side panel to view who is currently assigned and to assign to existing employees.
3. Click Edit Employee List from the left side panel.
4. Select the check box next to the employee to assign to a subscription package seat.
5. Click Submit to save the assignment.
How to Add License Information

Checkpoint Learning tracks 130 jurisdictions across the Accountancy and Legal industries including all state license requirements and several society requirements. In addition to these state and society regulators, Checkpoint Learning offers two customizable regulators for the administrator to track their employee’s CPE requirements:

- **In-Firm CPE Requirement** – Add this regulator to the employee’s account to track the total number of CPE earned in a calendar year, including an ethics requirement (if applicable) as deemed by the organization.

- **In-Firm Requirement (Adv 1 year)** – Add this regulator to the employee’s account to track the total number of CPE earned per year, including a specified number of Accounting and Auditing, Taxation, and Ethics and Fraud requirements as deemed by the organization. You can also determine the 12-month cycle (such as FY, CY) that the organization wants to track.

**Note:** For more information, check **Resources** to see the full list of regulators that Checkpoint Learning can track.

To add a regulator to an employee account, do the following:

1. Click **Employees**.
   
   The **Employee Manager** page appears.

2. In the **Employee Search** field, type the last name of the employee.

3. Click the **Submit** button to display the search results.

4. Click the name of the employee.
   
   The employee’s **Account Profile** page appears.

5. Click **Status Reports** from the **Employees Menu** on the left side panel.
   
   The **Status Report Manager** page appears.

6. Do the following for either industry:
   
   - **Accountancy** – Click **Manage Regulators** from the **Employees Menu** to add accountancy regulators to the employee’s account.
   
   - **Law** – Click **Manage Regulators** from the **Employees Menu** to add legal regulators to the employee’s account.

7. Select a regulator from the **Regulator** drop-down list on the **Manage Regulators** page.

8. Click the **Add** button.
   
   The **Status Report Questionnaire** page appears.

**Note:** Each status report questionnaire is specific to the regulator.
9. Answer the questions prompted in the Status Report Questionnaire to complete adding the regulator to the employee account. Click the Submit button after answering each question.

The selected regulator's Status Report page appears.
How to Add Non - Checkpoint Learning CPE

Checkpoint Learning enables you to add activities (and their CPE credits) to an employee account and those regulators attached to the employee.

To add an activity to an employee account, do the following:

1. Navigate to the employee's Account Profile.
2. Click Activities from the Employees Menu on the left side panel.
   The Activities page appears.
3. Click Add Activity from the Employees Menu.
   The Add Activity page appears.
4. Complete the following fields in the Activity Details section:
   - **Title** – Enter the class title.
   - **Sponsor** – Select the class sponsor from the Select drop-down list.
     
     **Note**: To add a sponsor to the list, click the Add sponsor link, complete the fields, and click Submit.
   - **Format** – Select the format type from the drop-down list.
   - **Completion Date** – Enter the completion date in MM/DD/YYYY format or click the Calendar icon to select the date.
   - **Notes** – Enter notes or additional information in the text box.

5. 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 the Ctrl key to highlight and move more than one regulator at a time. Click the single arrow icon to move individual regulators. Click the double arrow icon to move all regulators.

6. Select the Use Content Distributor check box if you want Checkpoint Learning to determine which category credits will appear. Then, click the Next button.
   - If you did not select the Use Content Distributor check box, skip directly to step 8.
   - If you selected the Use Content Distributor check box, the Credit Distribution Assistant page appears. Continue to step 7.
7. In the **Accountancy: Credit Distribution Assistant** section, do the following for each regulator:
   - Enter the Participation Time in minutes for the appropriate Field of Study category.
   - Select Yes or No that the activity is sponsored by a NASBA Registry provider and meets NASBA Registry standards of accreditation (if applicable).
   - Select Yes or No that the activity is sponsored by a NASBA QAS provider and meets NASBA QAS standards of accreditation (if applicable).
   - Enter the sponsor’s number (NASBA registry # or QAS #) (if applicable).
   - Select the option that best describes the sponsor of the activity.
   - Select the option that best describes the style of a technologically-delivered activity (if applicable).
   - Select the option that best describes the content of the activity.
   - Enter the location of the activity.

8. Click the **Next** button.

   The **Add Activities** page appears.

   **Note:** If you did not select the **Use Content Distributor** check box in step 6 and skipped to this step, you must manually enter the category/credit amount on the **Add Activities** page.

9. Review and edit the **Attributes, Category/Credits, and Properties** for each regulator displayed.

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

10. Click the **Submit** button.

    The **Activity Profile** page appears.
About the Competency Model

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

**Note:** Firm Professionals must subscribe to the Competency Model to have it included in their Checkpoint Learning.

Using the Competency Model, Firm Professionals can:

- View competencies and mapped courses
- Take a self-assessment of skills
- Add on-the-job activities
- Invite a manager/coach to provide feedback

Firm Administrators may also be requested to perform these procedures on behalf of an employee.

**To view competencies and mapped courses, do the following:**

1. Click **Competencies**.  
   The **Checkpoint Learning Competency Model** home page appears.
2. Select the check boxes next to the levels, areas of specialty, and categories that apply to the desired search.
   **Note:** Customize the search to view the competencies for the employee's current job or for a job they want in the future.
3. Select the **Show link to course maps** check box.
   **Note:** If **Show link to course maps** check box is not selected, the mapped courses associated with the selected competencies in step 4 will not be displayed.
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 the employee's skills, do the following:**
1. Click Competencies.

The Checkpoint Learning Competency Model home page appears.

2. Select the check boxes next to the levels, areas of specialty, and categories for which the employee is to be assessed.

   Note: Select one or all competencies. The selected competencies appear in the 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 desired competencies.

6. Click the Start Assessment button at the bottom of the page.

The 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.

   Note: The ratings that can be selected are 1 - Developing, 2 - Working, 3 - Practicing, 4 - Advanced, 5 - Expert. Click each competency name to display the proficiency rating descriptions.

8. Click the Save and view results button.

The model displays the self-assessment results.

9. To print the self-assessment, click the Print button at the top of the assessment.

10. To update the self ratings, click Update your results at the bottom of the page.

   Note: The results can be updated before the employee’s manager or coach is invited to provide feedback. Once they are invited, this option disappears.

To add on-the-job activities, do the following:

1. From the self-assessment results, click the Add On The Job Activity link beneath a competency to document the employee’s job activities that build proficiency for that specific competency.

2. When the pop-up window appears, enter comments about the job activities 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 the self-assessment.

To invite a manager/coach to provide feedback, do the following:

1. From the self-assessment results, click the Invite Manager/Coach button at the bottom of the page.

2. Enter the employee’s manager 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, and then click the **Invite** button.

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

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

When employees subscribe to the Competency Model, **Competencies** appears with the Main Menu in Checkpoint Learning.

When **Competencies** is clicked, the **Checkpoint Learning Competency Model** home page (shown below) is displayed as the default view. The interface has the following navigation conventions:

- Each page of the Competency Model shows available options in the **Left Side Panel**. These options can be selected to edit levels, specialties, categories, and competency topics. Edit the setup and run reports or view previous assessment reports.
- Select an option from the left side panel, content is displayed in the **Display Panel**.
- From any page in the Competency Model, click the **Competency Model - Home** link on the left side panel to return to the **Checkpoint Learning Competency Model** home page.
Edit Levels

Firm Administrators can manage the Competency Model by editing level definitions, adding new levels, and removing levels.

**Note:** The ability to **Add/Edit/Remove Levels** in the Competency Model applies to the firm's customized competency levels only.

To edit level definitions:

1. Click **Competencies**.
   
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Levels** from the **Manage Competency Model** menu on the left side panel.
   
   The **Edit Levels** page appears with definitions for five default levels: Director, Manager, Partner, Senior, and Staff.

3. Click the desired level definition to edit.
   
   The level definition page appears.

4. Edit the definition as necessary.

5. Click the **Save** button.

To add a new level:

1. Click **Competencies**.
   
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Levels** from the **Manage Competency Model** menu on the left side panel.
   
   The **Edit Levels** page appears.

3. Click the **Add New Level** button.
   
   The **Add Level** page appears.

4. Enter the name of the new level.

5. Enter the definition of the new level.

6. Click the **Save** button.
   
   The new level is added to the **Edit Levels** page.

To remove a level:

1. Click **Competencies**.
   
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Levels** from the **Manage Competency Model** menu on the left side panel.
The Edit Levels page appears.

3. Click the check box next to the level you want to remove.

4. Click the Remove button.

   A confirmation message appears.

5. Click OK to confirm the level should be removed.

   The level is removed from the Edit Levels page.
Edit Specialties

Firm Administrators can manage the Competency Model by editing specialty definitions, adding new specialties, and removing specialties.

**Note:** The ability to Add/Edit/Remove Specialties in the Competency Model applies to the firm's customized competency specialties only.

To edit specialty definitions:

1. Click Competencies.
   - The Checkpoint Learning Competency Model home page appears.
2. Click Edit Specialties from the Manage Competency Model menu on the left side panel.
   - The Edit Specialties page appears with definitions for five default specialties: Corporate Accounting, External Audit, Financial Management, Internal Audit, and Tax.
3. Click the specialty whose definition you want to edit.
   - The specialty definition page appears.
4. Edit the definition as necessary.
5. Click the Save button.

To add a new specialty:

1. Click Competencies.
   - The Checkpoint Learning Competency Model home page appears.
2. Click Edit Specialties from the Manage Competency Model menu on the left side panel.
   - The Edit Specialties page appears.
3. Click the Add New Specialty button.
   - The Add Specialty page appears.
4. Enter the name of the new specialty.
5. Enter the definition of the new specialty.
6. Click the Save button.
   - The new specialty is added to the Edit Specialties page.

To remove a specialty:

1. Click Competencies.
   - The Checkpoint Learning Competency Model home page appears.
2. Click Edit Specialties from the Manage Competency Model menu on the left side panel.
The Edit Specialties page appears.

3. Click the check box next to the specialty you want to remove.

4. Click the Remove button.
   
   A confirmation message appears.

5. Click OK to confirm that you want to remove the specialty.

   The specialty is removed from the Edit Specialties page.
Edit Categories

Firm Administrators can manage the Competency Model by editing category definitions, adding new categories, and removing categories.

**Note:** The ability to Add/Edit/Remove Categories in the Competency Model applies to the firm’s customized competency categories only.

To edit category definitions:

1. Click **Competencies**.
   - The Checkpoint Learning Competency Model home page appears.
2. Click **Edit Categories** from the Manage Competency Model menu on the left side panel.
   - The Edit Categories page appears with definitions for fourteen default categories.
3. Click the category whose definition you want to edit.
   - The category definition page appears.
4. Edit the definition as necessary.
5. Click the **Save** button.

To add a new category:

1. Click **Competencies**.
   - The Checkpoint Learning Competency Model home page appears.
2. Click **Edit Categories** from the Manage Competency Model menu on the left side panel.
   - The Edit Categories page appears.
3. Click the **Add New category** button.
   - The Add Categories page appears.
4. Enter the name of the new category.
5. Enter the definition of the new category.
6. Click the **Save** button.
   - The new category is added to the Edit Categories page.

To remove a category:

1. Click **Competencies**.
   - The Checkpoint Learning Competency Model home page appears.
2. Click **Edit categories** from the Manage Competency Model menu on the left side panel.
   - The Edit Categories page appears.
3. Click the check box next to the desired category.

4. Click the **Remove** button.
   
   A confirmation message appears.

5. Click **OK** to confirm the removal of the category.

   The category is removed from the **Edit Categories** page.
Edit Competencies

Firm Administrators can manage the Competency Model by editing competency topics, adding new competency topics, and removing competency topics.

Note: The ability to Add/Edit/Remove Competency Topics in the Competency Model applies to the firm's customized competencies only.

To edit competency topics:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.
2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   The Edit Competency Topics appears.
3. Click the competency topic to edit.
   The Edit Competency Topic page appears.
4. Edit the name, description, level, area of specialty, and category as necessary.
5. Click the Save button.

To add a new competency topic:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.
2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   The Edit Competency Topics page appears.
3. Click the Add New Competency Topic button.
   The Add Competency Topic page appears.
4. Enter the name of the new competency topic.
5. Enter the definition of the new competency topic.
6. Select one or more levels.
7. Select one or more areas of specialty.
8. Select one or more categories.
9. Click the Save button.
   The new competency topic is added to the Edit Competency Topics page.

To remove a competency topic:
1. Click **Competencies**.
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Competency Topics** from the **Manage Competency Model** menu on the left side panel.
   The **Edit Competency Topics** page appears.

3. Click the check box next to the competency topic to be removed.

4. Click the **Remove** button.
   A confirmation message appears.

5. Click **OK** to confirm the removal of the competency topic.
   The competency is removed from the **Edit Competency Topics** page.
Manage Competencies

Firm Administrators can manage competencies by adding a competency from a library, adding a new competency, removing a competency, managing competency ratings, adding a course map, and adding a career pathway.

Note: The ability to Add/Edit/Remove Competencies in the Competency Model applies to the firm’s customized competencies only.

To add a competency from a library:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.
2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   The Edit Competency Topics page appears.
3. Click the View Competencies link associated with the competency topic you want to manage.
   The Manage Competencies page appears.
4. Click the Add From Library button.
   The Add From Library page appears.
5. Select the competency topic from the drop-down list of libraries.
6. Enter the competency title or a keyword or phrase that appears in the title.
7. Click the Search button.
   The matching competencies appear.
8. Select the check boxes for the competencies you want to add.
9. Click the Add button.
10. If you get a message asking “Do you want to copy competency levels?” click OK.
    The new competencies appear on the Manage Competencies page.

Note: To remove a competency from this page, select the associated check box and click the Remove button. Then click OK to confirm the removal.

To add a new competency:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.
2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   The Edit Competency Topics page appears.
3. Click the **View Competencies** link associated with the appropriate competency topic.
   The **Manage Competencies** page appears.

4. Click the **Add New Competency** button.
   The **Add Competency** page appears.

5. Select the competency topic from the drop-down list.

6. Enter the new competency name.

7. Enter a description for the new competency.

8. Click the **Save** button.
   The new competency is added to the **Manage Competencies** page.

**Note:** To remove a competency from this page, select the associated check box and click the **Remove** button. Then click **OK** to confirm the removal.

To remove a competency topic:

1. Click **Competencies**.
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Competency Topics** from the **Manage Competency Model** menu on the left side panel.
   The **Edit Competency Topics** page appears.

3. Select the check box associated with the competency topic you want to delete.

4. Click the **Remove** button.
   A confirmation message appears.

5. Click **OK** to confirm the removal.

To remove a competency:

1. Click **Competencies**.
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Competency Topics** from the **Manage Competency Model** menu on the left side panel.
   The **Edit Competency Topics** page appears.

3. Click the **View Competencies** link associated with the appropriate competency topic.
   The **Manage Competencies** page appears.

4. Select the check box for the competency you want to remove.

5. Click the **Remove** button.

To manage competency ratings:
1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   The Edit Competency Topics page appears.

3. Click the View Competencies link associated with the appropriate competency topic.
   The Manage Competencies page appears.

4. Click the Ratings link associated with the competency whose ratings you want to manage.
   The Manage Competency Ratings page appears.

   **Note:** The competency showing in the Competency field is the competency whose ratings you can change. If you want another competency, you can select it from the drop-down list.

5. Click the rating name you want to change.
   The Edit Competency Rating page appears.

   **Note:** On this page you can change the rating name, prefix, and indicator description. You can also select check boxes for Not Applicable Response and Default Rating.

6. When you are finished with any changes, click the Save button.

   **To add a course map:**

   1. Click Competencies.
      The Checkpoint Learning Competency Model home page appears.

   2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
      The Edit Competency Topics page appears.

   3. Click the View Competencies link associated with the appropriate competency topic.
      The Manage Competencies page appears.

   4. Click the Course Maps link associated with the competency whose course maps you want to manage.
      The Competency Course Maps page appears.

   5. Click the Add Course Map to Competency button.
      The Select Course Maps page appears.

   6. Select the check boxes for the course maps you want to add.

   7. Click the Assign button.
      A confirmation message appears.
8. Click **OK** to confirm the assignment.

   The assigned course map appears on the **Competency Course Map** page.

   **Note:** To unassign a course map listed on this page, select the check box associated with the course map and click the **Unassign** button.

**To add a career pathway:**

1. Click **Competencies**.

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

2. Click **Edit Competency Topic** from the **Manage Competency Model** menu on the left side panel.

   The **Edit Competency Topics** page appears.

3. Locate the competency topic to which you want to add a career pathway.

   **Note:** The Career Path column contains either an Edit or Add link. If the column says Add, then there are no career paths associated with the competency topic and you can add one. If the column says Edit, then the competency topic already has a career pathway that can be edited.

4. Click the topic’s **Add** link.

   The **Career Pathway** page appears.

5. Click the **Add New Topic** button.

   The **Search Competency Topic** page appears.

6. Enter the competency topic name or a keyword or phrase that appears in the title.

7. Click the **Search** button.

   The matching topics appear in the list.

8. Select the check boxes associated with the topics you want to add.

9. Click the **Add to Career Pathway** button.

   The topic is added to the list on the Career Pathway page.

   **Note:** You can click the **View CP** link in the Career Pathway column to view the career pathway.
Edit Setup

Firm Administrators can edit the setup for both the Firm Administrator and Firm Professional roles. The settings that can be changed are the role's ability to edit competencies, view course maps, edit levels, invite feedback, edit ratings usage, and edit career pathways.

To edit setup:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit Setup from the Manage Competency Model menu on the left side panel.
   The Edit Setup page appears with a table showing which settings are enabled and which are not for the Firm Administrator and the Firm Participant.

   **Note:** The green checkmark ✓ indicates enabled. The red ✗ indicates not enabled.

3. Click the role name whose settings you want to change.
   The Edit Setup page for the selected role displays the available settings.

4. Select or clear the check boxes next to the settings as needed.

5. Click the Save button.
   The Edit Setup page displays the updated settings.

6. Click the Home button to leave this page and return to the Checkpoint Learning Competency Model home page.
Run Competency Model Reports

Firm Administrators can run assessment reports and download the Competency Model report.

To run assessment reports, do the following:

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Reports from the Manage Competency Model menu on the left side panel.
   
   The Reports page appears.

3. Enter the appropriate starting date in the Select Start Date field or click the Calendar icon to select a date.

4. Enter the appropriate ending date in the Select End Date field or click the Calendar icon to select a date.

5. Click the Download Report button.
   
   The report downloads all assessment data within the date range. Data includes name of employee, competencies assessed, self-rated score, and any manager/coach score.

To download the Competency Model report, do the following:

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Reports from the Manage Competency Model menu on the left side panel.
   
   The Reports page appears.

3. In the Competency Model section, click the Download Competency Model link.
   
   MS Excel opens the Competency Model report file.
View Assessment Results and Add Feedback

Firm Administrators can view assessment reports, view the team’s assessment reports, print assessment reports, and add feedback to assessment reports.

To view assessment results:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.
2. Click My Assessment Results from the View Competency Model menu on the left side panel.
   The My Assessment Results page appears with a list of all previously completed assessments.
3. Click to view the desired assessment report.
   The Display Assessment Results page appears.

   **Note:** The report shows the employee’s name, employee type, proficiency ratings, evaluation and assessment ratings.

4. To print an assessment report, click the Print button.

   **Note:** There are two Print buttons, one in the upper right corner of the report and one at the bottom of the report.

To add feedback to assessment results:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.
2. Click My Assessment Results from the View Competency Model menu on the left side panel.
   The My Assessment Results page appears with a list of all previously completed assessments.
3. Click the desired assessment report to add feedback.
   The Display Assessment Results page appears.
4. Click the Add feedback button.
   The Display Assessment Results page changes to allow feedback.
5. For each competency, click the Your Rating drop-down list and select the proficiency rating that best applies to the employee.
6. For each competency, click the Desired Rating drop-down list and select the proficiency rating that best applies to the employee.
7. On completion, click the Save button at the bottom of the report.
   The model displays the assessment with the feedback results.
Note: To correct a mistake and update the ratings again, click Update your results at the bottom of the report. Make the updates and click the Save button again.
How to Report Self-study and Webinar Course Completion

Checkpoint Learning provides customizable templates to run reports on employees and their on-demand learning progress.

Several templates are available in Checkpoint Learning on Reporting. Click the following template names to view more information about how to run these reports.

**Average Number of Attendees per Course**

This report lists the average number of attendees and direct deposits issued based on the organizations in-house courses.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg. Direct Deposits</td>
<td>Indicates the average number of direct deposits received for a course or course activity.</td>
</tr>
<tr>
<td>Avg. Registrants</td>
<td>Indicates the average number of employees received for a course or course activity.</td>
</tr>
<tr>
<td>College</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>University</td>
<td>Indicates the program source such as the firm's University and course options or Thomson Reuters University and course options.</td>
</tr>
<tr>
<td>Course</td>
<td>Indicates the program.</td>
</tr>
</tbody>
</table>

**Course "Starts" Report for Usage**

This report lists launched on-demand courses.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Indicates the date a particular course activity was started.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Credits</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Account Name</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Account ID</td>
<td>Indicates the organization’s ID as assigned by Checkpoint Learning.</td>
</tr>
<tr>
<td>Professional</td>
<td>Indicates the name of the individual assigned to the record.</td>
</tr>
<tr>
<td>College</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Number of Course Titles</td>
<td>Indicates the total number count of course titles pulled within a search.</td>
</tr>
<tr>
<td>Number of Course IDs</td>
<td>Indicates the total number of course code fields that have data entered within a search.</td>
</tr>
</tbody>
</table>
### Available Column | Description
--- | ---
Number of Professionals | Indicates the total number count of employees within a search.
Number of Colleges | Indicates the total number count of colleges within a search.
Number of Sponsors | Indicates the total number count of sponsors within a search.

#### Course Completion Report for Usage

This report lists completed on-demand course activities.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completion Date</td>
<td>Indicates the date a particular course activity was completed.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Credits</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Account Name</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Account ID</td>
<td>Indicates the organization’s ID as assigned by Checkpoint Learning.</td>
</tr>
<tr>
<td>Professional</td>
<td>Indicates the name of the individual assigned to the record.</td>
</tr>
<tr>
<td>College</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Number of Course Titles</td>
<td>Indicates the total number count of course titles pulled within a search.</td>
</tr>
<tr>
<td>Number of Course IDs</td>
<td>Indicates the total number of course code fields that have data entered within a search.</td>
</tr>
<tr>
<td>Number of Account Names</td>
<td>Indicates the total number count of the organizations that own the college/sponsor of the activity.</td>
</tr>
<tr>
<td>Number of Account ID</td>
<td>Indicates the total number count of the organization IDs assigned to the organization by Checkpoint Learning.</td>
</tr>
<tr>
<td>NASBA Field of Study</td>
<td>Indicates the field(s) of study applied to the course.</td>
</tr>
</tbody>
</table>

#### Courses Ordered Report

This report lists Thomson Reuters courses ordered by professionals and approved by coordinators.

**Note:** Firms who purchase the custom course order form will see data in this report.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinator</td>
<td>Indicates the name of the administrator for firms with custom order forms.</td>
</tr>
</tbody>
</table>
**Available Column** | **Description**
--- | ---
Professional | Indicates the name of the individual assigned to the record.
CLIN | Indicates the IRS number assigned to a course.
Course Title | Indicates the title of the learning activity.
CPE Credits | Indicates the number of hours earned for the program.
Course Request Date | Indicates the date the course was requested. This is used by firms with custom order forms.
Course Approval Date | Indicates the date the course was approved by the Coordinator. This is used by firms with custom order forms.
Course Request Status | Indicates the status or a course request: requested or approved.
Professional Email | Indicates the employees email address.

**Free Form Responses Report for Evaluations**
This report lists the data entered in the comment or text boxes in evaluations.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Date</td>
<td>Indicates the date in which the evaluation was completed by the employee.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Authors</td>
<td>Indicates the author of the course.</td>
</tr>
<tr>
<td>Instructor</td>
<td>Indicates the instructor of the course.</td>
</tr>
<tr>
<td>Evaluation Question</td>
<td>Indicates the questions asked in an evaluation.</td>
</tr>
<tr>
<td>Evaluation Form Template</td>
<td>Indicates the evaluation form used to evaluation the program.</td>
</tr>
<tr>
<td>Evaluation Comments</td>
<td>Indicates the comments made in the comments section of the evaluation.</td>
</tr>
<tr>
<td>Number of Course Titles</td>
<td>Indicates the total number count of course titles pulled within a search.</td>
</tr>
<tr>
<td>Number of Course ID</td>
<td>Indicates the total number of course code fields that have data entered within a search.</td>
</tr>
<tr>
<td>Number of Authors</td>
<td>Indicates the number of authors for a program.</td>
</tr>
<tr>
<td>Number of Instructors</td>
<td>Indicates the number of instructors for a program.</td>
</tr>
<tr>
<td>Number of Evaluation Questions</td>
<td>Indicates the number of evaluation questions in a given evaluation.</td>
</tr>
</tbody>
</table>

**Issued Credits Report for Usage**
This report lists on completed on-demand courses that have credits issued to professionals.
## How to Report Self-study and Webinar Course Completion

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Date</td>
<td>Indicates the date in which credit was issued to the employee.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Account Name</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Account ID</td>
<td>Indicates the organization’s ID as assigned by Checkpoint Learning.</td>
</tr>
<tr>
<td>Professional</td>
<td>Indicates the name of the individual assigned to the record.</td>
</tr>
<tr>
<td>College</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Regulator</td>
<td>Indicates the state or license or jurisdiction.</td>
</tr>
<tr>
<td>Number of Course Titles</td>
<td>Indicates the total number count of course titles pulled within a search.</td>
</tr>
<tr>
<td>Number of Course ID</td>
<td>Indicates the total number of course code fields that have data entered within a search.</td>
</tr>
<tr>
<td>Number of Account Names</td>
<td>Indicates the total number count of the organizations that own the college/sponsor of the activity.</td>
</tr>
<tr>
<td>Number of Account ID</td>
<td>Indicates the total number count of the organization IDs assigned to the organization by Checkpoint Learning.</td>
</tr>
<tr>
<td>Number of Professionals</td>
<td>Indicates the total number count of professionals within a search.</td>
</tr>
<tr>
<td>Number of Colleges</td>
<td>Indicates the total number count of colleges within a search.</td>
</tr>
<tr>
<td>Number of Sponsors</td>
<td>Indicates the total number count of sponsors within a search.</td>
</tr>
<tr>
<td>Number of Regulators</td>
<td>Indicates the number of states, licenses, or jurisdictions selected.</td>
</tr>
</tbody>
</table>

### Lists of What Professionals Have Registered For and Taken

This report lists the in-house courses your professionals have registered for or taken.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Indicates the name of the report.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Title</td>
<td>Indicates the title of the employee.</td>
</tr>
<tr>
<td>Department</td>
<td>Indicates the department of the employee.</td>
</tr>
<tr>
<td>Office</td>
<td>Indicates the office of the employee.</td>
</tr>
<tr>
<td>Course Started</td>
<td>Indicates an on-demand course.</td>
</tr>
<tr>
<td>Registered</td>
<td>Indicates a live course.</td>
</tr>
<tr>
<td>Direct Deposits</td>
<td>Indicates whether credits were issued for attending the course.</td>
</tr>
</tbody>
</table>
### Available Column | Description
--- | ---
Live Event Date | Indicates the date of the live event.
Course Start Date | Indicates the date the on-demand course was started.

#### Number of Attendees per Course Activity

This report lists the average number of attendees and direct deposits issued based on the organizations in-house courses.

| Available Column | Description |
--- | ---
Course | Indicates the parent course title.
Course Activity Title | Indicates the course activity or program title.
Sponsor | Indicates the sponsor of the program, the organization authorized to issue certificates of completion.
Format | Indicates the format or mode in which a course was offered.
Completion Date | Indicates the date a course was completed.
#Registrants | Indicates the number of employees.
#Direct Deposits | Indicates the number of direct deposits; instances where credit was issued.
#Courses Started | Indicates the number of instances a course was started.
College | Indicates the provider of the course.
University | Indicates the University, either Thomson Reuters or Firm Sponsored.

#### Numeric Responses Report for Evaluations

This report lists the data entered in course activity evaluations.

| Available Column | Description |
--- | ---
Evaluation Date | Indicates the date an evaluation was answered.
Course Title | Indicates the title of the learning activity.
Course ID | Indicates the data entered in the Course Code field within the course profile.
Authors | Indicates the author of the program.
Instructor | Indicates the instructor of the program.
Evaluation Question | Indicates the evaluation question.
Evaluation Form Template | Indicates the evaluation template used to evaluate the program.
Evaluation Comments | Indicates the evaluation comments from a program.
Number of Course Titles | Indicates the total number count of course titles pulled within a search.
Number of Course ID | Indicates the total number of course code fields that have data entered.
### Available Column

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>within a search.</td>
</tr>
<tr>
<td>Number of Authors</td>
</tr>
<tr>
<td>Number of Instructors</td>
</tr>
<tr>
<td>Number of Evaluation Questions</td>
</tr>
<tr>
<td>% Answered with Option 1</td>
</tr>
<tr>
<td>% Answered with Option 2</td>
</tr>
<tr>
<td>% Answered with Option 3</td>
</tr>
<tr>
<td>% Answered with Option 4</td>
</tr>
<tr>
<td>% Answered with Option 5</td>
</tr>
<tr>
<td>% Answered with Option 6</td>
</tr>
<tr>
<td>% Answered with Option 7</td>
</tr>
<tr>
<td>% Answered with Option 8</td>
</tr>
<tr>
<td>% Answered with Option 9</td>
</tr>
<tr>
<td>% Answered with Option 10</td>
</tr>
</tbody>
</table>

### Online Grading Examinations Usage

This report lists the online grading exams completed by employees.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OGS Examination Name</td>
<td>Indicates the name of the online grading exam.</td>
</tr>
<tr>
<td>Professional</td>
<td>Indicates the name of the individual assigned to the record.</td>
</tr>
<tr>
<td>Title</td>
<td>Indicates the title of the employees.</td>
</tr>
<tr>
<td>Office</td>
<td>Indicates the office of the employees.</td>
</tr>
<tr>
<td>Department</td>
<td>Indicates the department of the employees.</td>
</tr>
<tr>
<td>Examination Start Date</td>
<td>Indicates the date the exam was started.</td>
</tr>
<tr>
<td>Examination Completion Date</td>
<td>Indicates the date the exam was completed.</td>
</tr>
<tr>
<td>Examination Expiration Date</td>
<td>Indicates the date the exam expires.</td>
</tr>
<tr>
<td>Number of Attempts</td>
<td>Indicates the number of attempts to pass the course.</td>
</tr>
</tbody>
</table>

### Pick N Bundle Report

This report lists the courses selected from purchased course packages.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pick N Bundle Product Title</td>
<td>Indicates the Pick N Bundle title.</td>
</tr>
</tbody>
</table>
## Available Column Description

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Indicates the title of the learning activity.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media Format</td>
<td>Indicates the media format.</td>
</tr>
<tr>
<td>Marketing Course Description</td>
<td>Indicates the course description.</td>
</tr>
<tr>
<td>NASBA Field of Study</td>
<td>Indicates the field(s) of study the applied to the course.</td>
</tr>
<tr>
<td>CPE Credits</td>
<td>Indicates the number of credits the course qualifies for.</td>
</tr>
<tr>
<td>Bundle Expiration Date</td>
<td>Indicates the date the bundle expires.</td>
</tr>
</tbody>
</table>

### Shopping Cart Purchase History

This report lists the courses purchased by employees.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course Purchased Date</td>
<td>Indicates the date the course was purchased.</td>
</tr>
<tr>
<td>Course Status</td>
<td>Indicates whether the course is started or completed.</td>
</tr>
<tr>
<td>Employee Name</td>
<td>Indicates the employee’s name.</td>
</tr>
<tr>
<td>Number of Courses</td>
<td>Indicates the number of courses.</td>
</tr>
<tr>
<td>Purchased Mode</td>
<td>Indicates how the course was purchased.</td>
</tr>
<tr>
<td>Price</td>
<td>Indicates the price of the course.</td>
</tr>
</tbody>
</table>
How to Report Webinar Registrations and Completions

Checkpoint Learning provides a list of employee registrations and direct deposits. This list can be sorted by date, employee, course title and direct deposits received.

To perform a registration search, do the following:

1. Click University.
2. Scroll down and click the Registrations Search link from the left hand pane under the Search Course Activities section.
3. Do any or all of the following, then click the Search button.
4. In the Course Activity Criteria section, select the following information:
   - Course Activity Status – Select the appropriate radio button
   - Formats – Select the course activity format from the list.
   - Sponsors – Select the appropriate sponsor from the list.
   - Starting no earlier than/Starting no later than – Select the calendar icon to choose date parameters.
5. In the Registrant Criteria section, do the following:
   - Administrative Groups – Scroll to select administrative groups.
   - Group Relationship – Click the appropriate radio button to select group relationship.
   - Show members of no groups – Click the appropriate radio button to select member of group.
   - Has Activity Status – Click the appropriate radio button to select activity status.
6. The Registrations Search Results page displays the:
   - Start Date – Indicates the date a particular course activity was started.
   - Registrant – Indicates the name of the employee.
   - Username – Indicates the email address of the employee.
   - Course Activity Title – Indicates the course activity or program title.
   - College – Indicates the provider of the course.
   - Format – Indicates the format or mode in which a course was offered.
   - Direct Deposit – Indicates the employee was registered and received a direct deposit.
     - Indicates the employee was on the roster, but did not receive a direct deposit.
7. To export this report in excel format, click the **Export to Excel** link at the top right hand corner, under the sponsor name.
How to View Employees Certificates of Completion

To view an employee's certificate of completion, do the following:

1. From the Employee Manager, click the professional’s name. The account profile displays.
2. From the employee management menu from the left side panel click activities. The list of activities displays.
3. From the left side panel, click certificate. Any in house issued and Checkpoint LEARNING certificate is displayed.
About the Learning Paths Module

The Learning Paths module in Checkpoint Learning enables Firm Administrators to:

- Assign courses by a specific deadline to your employees.
- Track employee status in completing the courses assigned to them.
- Track the status of a course and the employees assigned to complete the course.
- Run reports on courses and the employees assigned to those courses.
- Enable coaches to edit their assigned staff’s learning plans.
- Enable professionals to edit their individual learning plans.

For more information about the Learning Paths module, contact Customer Support at 1.800.431.9025.
Create a Learning Path

Checkpoint Learning enables the administrator to create learning paths, a collection of courses within the University that must be completed by a specified date. Once learning path is created, it can be assigned to the employees.

To create a learning path, do the following:

1. Click **Learning Paths**. The **Learning Paths** page appears.
2. Click **Create Path** from the **Learning Paths Menu** on the left side panel.
   The **Create Path** page appears.
3. In the **Details** section, enter the following:
   - **Path Name** – Enter a name for the learning path.
   - **Description** – Enter a description of the learning path. This description will be used by the Firm Administrator only.
4. In the **Select University** section, select the appropriate university from the drop-down list.
5. Click the **Change University** button.
   Depending on which university is selected, additional fields appear. Use these fields to enter search criteria to display associated courses.

   **Note**: Select a specific college, field of study, format, or course title from the search criteria.

6. Once the desired search criteria has been selected, click the **Search** button.
   The associated courses appear in the **Courses** section.
7. In the **Courses** section, enter the following:
   - **Courses** – Select the check box for each course to be included in the learning path.
   - **Mandatory** – Select the check box for each course that is mandatory for the employee to complete.
8. Each learning path can have courses from more than one university. If necessary, repeat step 4 through step 7 to add courses from another university.
9. Click the **Submit** button.
   The **Learning Path** page displays the new learning path and a list of the assigned courses.

   **Note**: To edit the course list: Click the 🔄 icon next to a course to make it mandatory. Click the ❌ icon to delete the course from the learning path.
Assign a Learning Path to Professionals

Once a learning path has been created, assign the path to your employees. Employees are then enabled to view the courses assigned to them, know when to take the assigned programs, and view their status of completion for assigned courses.

To assign a learning path to employees, do the following:

1. Click Learning Paths.
   
   The Learning Paths page appears.

2. In the Learning Paths section, click the Assign Learning Path to Employee icon next to the desired course.
   
   The Assign Path to Employees page appears.

3. In the Courses section, enter the following:
   
   - Mandatory – Confirm or select the check box for all mandatory courses.
   - Target – Enter the target date (format MM/DD/YYYY) by which employees must complete the course. Or click the Calendar icon and select the date.

4. In the Employees section, select the check box for the employees who should be assigned the course.
   
   Note: If a course is assigned to an employee's learning path where the employee already has that course, the course appears only once in the employee's learning path.

5. Click the Submit button.
   
   The Assign Path to Employees page lists the employees assigned to the learning path.
Assign an Individual Course to Professionals

Checkpoint Learning enables the administrator to assign individual courses to employees without having to create a learning plan specifically for that individual or course.

To assign courses to the employees, the Firm must have access to the University and Learning Path modules. For more information about these modules, contact Customer Support at 1.800.431.9025.

To assign an individual course to employees, do the following:

1. Click University.
2. Click the sponsor of the course activity from the University Menu on the left side panel.
3. Navigate to the parent course profile and click the link.
   The Course Profile page is displayed.
4. Click Assign to Employees from the University Menu on the left side panel.
5. In the Learning Plan Parameters section, do the following:
   - Mandatory – Select the check box of the respective mandatory courses. Unchecked courses are optional.
   - Target Date – Enter the date in which the employees must complete the course (format MM/DD/YYYY). Or click the Calendar icon and select the date.
6. In the Employees section, select the checkbox next to the employees name.
7. Click the Submit button.
   The Learning Plan page is displayed with a list of the assigned courses.
Assign Courses to an Individual Professional

Checkpoint Learning enables the administrator to assign courses to individual employees without having to create a learning plan specifically for that employee.

To assign courses to the employees, the Firm must purchase the University and Learning Path modules. For more information about these modules, contact Customer Support at 1.800.431.9025.

To assign courses to a employee, do the following:

1. Navigate to the employee’s Account Profile.
2. Click Learning Planning from the Employees Menu on the left side panel.
   
The Learning Planning page appears.
3. Click Assign Courses from the Employees Menu.
   
The Search for Courses to Assign page appears.
4. In the Select University section, select the appropriate university from the drop-down list.
5. Click the Change University button.
   
Depending on which university is selected, additional fields appear. Use these fields to enter search criteria to display associated courses.

   **Note:** Select a specific college, field of study, brand, format, or course title from the search criteria field.

6. Once the search criteria has been entered, click the Search button.
   
The Assign Courses to Plan page appears.
7. In the Courses section, enter the following:
   
   - **Mandatory** – Select the check box of the respective mandatory courses. Unchecked courses are optional.
   - **Target Date** – Enter the date in which the employee must complete the course (format MM/DD/YYYY). Or click the Calendar icon and select the date.

8. Click the Submit button.
   
The Learning Plan page appears with a list of the assigned courses.
Edit a Course Assigned to an Employee

Checkpoint Learning enables the administrator to edit the courses assigned to the employees. Once a course has been assigned to an employee, edit the target date, determine whether the course is mandatory for the employee, the status of the course as well as enter comments regarding the assigned course in the employee’s learning plan.

To edit a course assigned to an employee, do the following:

1. Navigate to the employee’s Account Profile.
2. Click Learning Planning from the Employees Menu on the left side panel.
   The Learning Planning page appears.
3. Click View All Items to display all items to edit.
4. Click the Edit icon for the desired course.
   The Edit Learning Plan Item page appears.
5. In the Learning Plan Item section, enter any of the following:
   - Target Date – Edit or confirm the date the course must be completed by.
   - Mandatory – Confirm or select the check box to indicate whether the course is mandatory for the employee.
   - Status Override – Select a status from the drop-down list.
6. In the Comments section, enter a comment in the text box (if applicable).
7. Click the Submit button to save changes.
Email a Professional's Learning Plan

Checkpoint Learning enables the administrator to email the list of courses assigned to a employee.

To assign courses to the employees, the Firm must purchase the University and Learning Path modules. For more information about these modules, contact Customer Support at 1.800.431.9025.

To email a employee's learning plan, do the following:

1. Navigate to the employee's Account Profile.

2. Click Learning Planning from the Employees Menu on the left side panel.

   The Learning Planning page appears.

3. Click the Email icon on the Learning Plan title bar.

   The Learning Plan Email page appears.

4. In the Send Incomplete only section, select whether to send only incomplete courses.
   - Select the check box to email only courses that have not been completed.
   - An unchecked box sends both complete and incomplete courses.

5. In the Optional Message section, enter a message in the text box.

6. Click the Send Email button.
Run Learning Plan Reports

Checkpoint Learning provides learning plan reports that show the completion status of the courses assigned to employees. There are three basic learning plan reports: All Plans Analysis by Employee, All Plans Analysis by Course, and the individual course assigned analysis.

Note: Each report can be exported to MS Excel by clicking the Export to Excel button in the upper right corner of the report.

The View All Plans Analysis by Employee report lists all employees, the number of assigned items on each employees learning plan, and the status of the learning plan items (registered, completed, or no action).

To view the All Plans Analysis by Employee report, do the following:

1. Click Learning Paths.
2. Click Learning Plan Report from the Learning Paths Menu on the left side panel.
3. Click sponsors from the Select Sponsor section drop-down lists on the left side panel.
4. In the All Plans by Employee section, click the link View 'All Plans Analysis by Employee'.

Note: Click the column heading to sort by employee, title, office, department, total, no action, registered/waitlisted/in progress, or completed. Click the employee name to view his/her learning plan.

The View All Plans Analysis by Course report lists the organization’s course offerings and the number of employees assigned to each course including the status of completion.

To view the All Plans Analysis by Course report, do the following:

In the All Plans By Course section, click View 'All Plans Analysis by Course' for (the Selected Sponsor).

Note: Click the column heading to sort by course, total plans, no action, registered/waitlisted/in progress, completed, waived, mandatory, optional, or past due. Click the course title to view the Course Profile.

The Learning Plans Single Course Analysis report lists the employees assigned to a course, whether the course is mandatory for the employee, the target date of completion, and the status of the course (such as registered, completed, or no action).

To view the Learning Plans Single Course Analysis report, do the following:

In the Course Reports for Selected Sponsor section, click any of the course titles to view the employee assigned and their respective status.

Note: Click the Learning Plans section column heading to sort by name, title, office or practice. Click the employee’s name to view his or her learning plan.
About the Competency Model

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

Note: Firm Professionals must subscribe to the Competency Model to have it included in their Checkpoint Learning.

Using the Competency Model, Firm Professionals can:

- View competencies and mapped courses
- Take a self-assessment of skills
- Add on-the-job activities
- Invite a manager/coach to provide feedback

Firm Administrators may also be requested to perform these procedures on behalf of an employee.

To view competencies and mapped courses, do the following:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.

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

   Note: Customize the search to view the competencies for the employee's current job or for a job they want in the future.

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

   Note: If Show link to course maps check box is not selected, the mapped courses associated with the selected competencies in step 4 will not be displayed.

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 the employee's skills, do the following:
1. Click Competencies.

   The Checkpoint Learning Competency Model home page appears.

2. Select the check boxes next to the levels, areas of specialty, and categories for which the employee is to be assessed.

   **Note:** Select one or all competencies. The selected competencies appear in the 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 desired competencies.

6. Click the Start Assessment button at the bottom of the page.

   The 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.

   **Note:** The ratings that can be selected are 1 - Developing, 2 - Working, 3 - Practicing, 4 - Advanced, 5 - Expert. Click each competency name to display the proficiency rating descriptions.

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

   The model displays the self-assessment results.

9. To print the self-assessment, click the Print button at the top of the assessment.

10. To update the self ratings, click **Update your results** at the bottom of the page.

    **Note:** The results can be updated before the employee’s manager or coach is invited to provide feedback. Once they are invited, this option disappears.

**To add on-the-job activities, do the following:**

1. From the self-assessment results, click the Add On The Job Activity link beneath a competency to document the employee’s job activities that build proficiency for that specific competency.

2. When the pop-up window appears, enter comments about the job activities 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 the self-assessment.

**To invite a manager/coach to provide feedback, do the following:**

1. From the self-assessment results, click the Invite Manager/Coach button at the bottom of the page.

2. Enter the employee’s manager 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, and then click the **Invite** button.

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

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

When employees subscribe to the Competency Model, **Competencies** appears with the Main Menu in Checkpoint Learning.

When **Competencies** is clicked, the **Checkpoint Learning Competency Model** home page (shown below) is displayed as the default view. The interface has the following navigation conventions:

- Each page of the Competency Model shows available options in the **Left Side Panel**. These options can be selected to edit levels, specialties, categories, and competency topics. Edit the setup and run reports or view previous assessment reports.

- Select an option from the left side panel, content is displayed in the **Display Panel**.

- From any page in the Competency Model, click the **Competency Model - Home** link on the left side panel to return to the **Checkpoint Learning Competency Model** home page.
**Edit Levels**

Firm Administrators can manage the Competency Model by editing level definitions, adding new levels, and removing levels.

**Note:** The ability to **Add/Edit/Remove Levels** in the Competency Model applies to the firm's customized competency levels only.

**To edit level definitions:**

1. Click **Competencies**.
   
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Levels** from the **Manage Competency Model** menu on the left side panel.
   
   The **Edit Levels** page appears with definitions for five default levels: Director, Manager, Partner, Senior, and Staff.

3. Click the desired level definition to edit.
   
   The level definition page appears.

4. Edit the definition as necessary.

5. Click the **Save** button.

**To add a new level:**

1. Click **Competencies**.
   
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Levels** from the **Manage Competency Model** menu on the left side panel.
   
   The **Edit Levels** page appears.

3. Click the **Add New Level** button.
   
   The **Add Level** page appears.

4. Enter the name of the new level.

5. Enter the definition of the new level.

6. Click the **Save** button.
   
   The new level is added to the **Edit Levels** page.

**To remove a level:**

1. Click **Competencies**.
   
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Levels** from the **Manage Competency Model** menu on the left side panel.
The **Edit Levels** page appears.

3. Click the check box next to the level you want to remove.

4. Click the **Remove** button.
   
   A confirmation message appears.

5. Click **OK** to confirm the level should be removed.
   
   The level is removed from the **Edit Levels** page.
Edit Specialties

Firm Administrators can manage the Competency Model by editing specialty definitions, adding new specialties, and removing specialties.

**Note:** The ability to **Add/Edit/Remove Specialties** in the Competency Model applies to the firm's customized competency specialties only.

To edit specialty definitions:

1. Click **Competencies**.
   - The **Checkpoint Learning Competency Model** home page appears.
2. Click **Edit Specialties** from the **Manage Competency Model** menu on the left side panel.
   - The **Edit Specialties** page appears with definitions for five default specialties: Corporate Accounting, External Audit, Financial Management, Internal Audit, and Tax.
3. Click the specialty whose definition you want to edit.
   - The specialty definition page appears.
4. Edit the definition as necessary.
5. Click the **Save** button.

To add a new specialty:

1. Click **Competencies**.
   - The **Checkpoint Learning Competency Model** home page appears.
2. Click **Edit Specialties** from the **Manage Competency Model** menu on the left side panel.
   - The **Edit Specialties** page appears.
3. Click the **Add New Specialty** button.
   - The **Add Specialty** page appears.
4. Enter the name of the new specialty.
5. Enter the definition of the new specialty.
6. Click the **Save** button.
   - The new specialty is added to the **Edit Specialties** page.

To remove a specialty:

1. Click **Competencies**.
   - The **Checkpoint Learning Competency Model** home page appears.
2. Click **Edit Specialties** from the **Manage Competency Model** menu on the left side panel.
The **Edit Specialties** page appears.

3. Click the check box next to the specialty you want to remove.

4. Click the **Remove** button.

   A confirmation message appears.

5. Click **OK** to confirm that you want to remove the specialty.

   The specialty is removed from the **Edit Specialties** page.
Edit Categories

Firm Administrators can manage the Competency Model by editing category definitions, adding new categories, and removing categories.

Note: The ability to Add/Edit/Remove Categories in the Competency Model applies to the firm's customized competency categories only.

To edit category definitions:

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit Categories from the Manage Competency Model menu on the left side panel.
   
   The Edit Categories page appears with definitions for fourteen default categories.

3. Click the category whose definition you want to edit.
   
   The category definition page appears.

4. Edit the definition as necessary.

5. Click the Save button.

To add a new category:

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit Categories from the Manage Competency Model menu on the left side panel.
   
   The Edit Categories page appears.

3. Click the Add New category button.
   
   The Add Categories page appears.

4. Enter the name of the new category.

5. Enter the definition of the new category.

6. Click the Save button.
   
   The new category is added to the Edit Categories page.

To remove a category:

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit categories from the Manage Competency Model menu on the left side panel.
   
   The Edit Categories page appears.
3. Click the check box next to the desired category.

4. Click the **Remove** button.
   
   A confirmation message appears.

5. Click **OK** to confirm the removal of the category.
   
   The category is removed from the **Edit Categories** page.
Edit Competencies

Firm Administrators can manage the Competency Model by editing competency topics, adding new competency topics, and removing competency topics.

**Note:** The ability to Add/Edit/Remove Competency Topics in the Competency Model applies to the firm's customized competencies only.

To edit competency topics:

1. Click Competencies.
   - The Checkpoint Learning Competency Model home page appears.
2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   - The Edit Competency Topics appears.
3. Click the competency topic to edit.
   - The Edit Competency Topic page appears.
4. Edit the name, description, level, area of specialty, and category as necessary.
5. Click the Save button.

To add a new competency topic:

1. Click Competencies.
   - The Checkpoint Learning Competency Model home page appears.
2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   - The Edit Competency Topics page appears.
3. Click the Add New Competency Topic button.
   - The Add Competency Topic page appears.
4. Enter the name of the new competency topic.
5. Enter the definition of the new competency topic.
6. Select one or more levels.
7. Select one or more areas of specialty.
8. Select one or more categories.
9. Click the Save button.
   - The new competency topic is added to the Edit Competency Topics page.

To remove a competency topic:
1. Click Competencies.  
   The Checkpoint Learning Competency Model home page appears.  

2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.  
   The Edit Competency Topics page appears.  

3. Click the check box next to the competency topic to be removed.  

4. Click the Remove button.  
   A confirmation message appears.  

5. Click OK to confirm the removal of the competency topic.  
   The competency is removed from the Edit Competency Topics page.
Manage Competencies

Firm Administrators can manage competencies by adding a competency from a library, adding a new competency, removing a competency, managing competency ratings, adding a course map, and adding a career pathway.

Note: The ability to Add/Edit/Remove Competencies in the Competency Model applies to the firm’s customized competencies only.

To add a competency from a library:

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   
   The Edit Competency Topics page appears.

3. Click the View Competencies link associated with the competency topic you want to manage.
   
   The Manage Competencies page appears.

4. Click the Add From Library button.
   
   The Add From Library page appears.

5. Select the competency topic from the drop-down list of libraries.

6. Enter the competency title or a keyword or phrase that appears in the title.

7. Click the Search button.
   
   The matching competencies appear.

8. Select the check boxes for the competencies you want to add.

9. Click the Add button.

10. If you get a message asking “Do you want to copy competency levels?” click OK.
   
    The new competencies appear on the Manage Competencies page.

Note: To remove a competency from this page, select the associated check box and click the Remove button. Then click OK to confirm the removal.

To add a new competency:

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   
   The Edit Competency Topics page appears.
3. Click the View Competencies link associated with the appropriate competency topic.
   The Manage Competencies page appears.

4. Click the Add New Competency button.
   The Add Competency page appears.

5. Select the competency topic from the drop-down list.

6. Enter the new competency name.

7. Enter a description for the new competency.

8. Click the Save button.
   The new competency is added to the Manage Competencies page.

   **Note:** To remove a competency from this page, select the associated check box and click the Remove button. Then click OK to confirm the removal.

To remove a competency topic:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   The Edit Competency Topics page appears.

3. Select the check box associated with the competency topic you want to delete.

4. Click the Remove button.
   A confirmation message appears.

5. Click OK to confirm the removal.

To remove a competency:

1. Click Competencies.
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit Competency Topics from the Manage Competency Model menu on the left side panel.
   The Edit Competency Topics page appears.

3. Click the View Competencies link associated with the appropriate competency topic.
   The Manage Competencies page appears.

4. Select the check box for the competency you want to remove.

5. Click the Remove button.

To manage competency ratings:
1. Click **Competencies**.
   The **Checkpoint Learning Competency Model** home page appears.

2. Click **Edit Competency Topics** from the **Manage Competency Model** menu on the left side panel.
   The **Edit Competency Topics** page appears.

3. Click the **View Competencies** link associated with the appropriate competency topic.
   The **Manage Competencies** page appears.

4. Click the **Ratings** link associated with the competency whose ratings you want to manage.
   The **Manage Competency Ratings** page appears.

   **Note:** The competency showing in the **Competency** field is the competency whose ratings you can change. If you want another competency, you can select it from the drop-down list.

5. Click the rating name you want to change.
   The **Edit Competency Rating** page appears.

   **Note:** On this page you can change the rating name, prefix, and indicator description. You can also select check boxes for Not Applicable Response and Default Rating.

6. When you are finished with any changes, click the **Save** button.

   To add a course map:

   1. Click **Competencies**.
      The **Checkpoint Learning Competency Model** home page appears.

   2. Click **Edit Competency Topics** from the **Manage Competency Model** menu on the left side panel.
      The **Edit Competency Topics** page appears.

   3. Click the **View Competencies** link associated with the appropriate competency topic.
      The **Manage Competencies** page appears.

   4. Click the **Course Maps** link associated with the competency whose course maps you want to manage.
      The **Competency Course Maps** page appears.

   5. Click the **Add Course Map to Competency** button.
      The **Select Course Maps** page appears.

   6. Select the check boxes for the course maps you want to add.

   7. Click the **Assign** button.
      A confirmation message appears.
8. Click OK to confirm the assignment.

The assigned course map appears on the Competency Course Map page.

Note: To unassign a course map listed on this page, select the check box associated with the course map and click the Unassign button.

To add a career pathway:

1. Click Competencies.

The Checkpoint Learning Competency Model home page appears.

2. Click Edit Competency Topic from the Manage Competency Model menu on the left side panel.

The Edit Competency Topics page appears.

3. Locate the competency topic to which you want to add a career pathway.

Note: The Career Path column contains either an Edit or Add link. If the column says Add, then there are no career paths associated with the competency topic and you can add one. If the column says Edit, then the competency topic already has a career pathway that can be edited.

4. Click the topic’s Add link.

The Career Pathway page appears.

5. Click the Add New Topic button.

The Search Competency Topic page appears.

6. Enter the competency topic name or a keyword or phrase that appears in the title.

7. Click the Search button.

The matching topics appear in the list.

8. Select the check boxes associated with the topics you want to add.

9. Click the Add to Career Pathway button.

The topic is added to the list on the Career Pathway page.

Note: You can click the View CP link in the Career Pathway column to view the career pathway.
Edit Setup

Firm Administrators can edit the setup for both the Firm Administrator and Firm Professional roles. The settings that can be changed are the role’s ability to edit competencies, view course maps, edit levels, invite feedback, edit ratings usage, and edit career pathways.

To edit setup:

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Edit Setup from the Manage Competency Model menu on the left side panel.

   The Edit Setup page appears with a table showing which settings are enabled and which are not for the Firm Administrator and the Firm Participant.

   **Note:** The green checkmark (✓) indicates enabled. The red (✗) indicates not enabled.

3. Click the role name whose settings you want to change.

   The Edit Setup page for the selected role displays the available settings.

4. Select or clear the check boxes next to the settings as needed.

5. Click the Save button.

   The Edit Setup page displays the updated settings.

6. Click the Home button to leave this page and return to the Checkpoint Learning Competency Model home page.
Run Competency Model Reports

Firm Administrators can run assessment reports and download the Competency Model report.

**To run assessment reports, do the following:**

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Reports from the Manage Competency Model menu on the left side panel.
   
   The Reports page appears.

3. Enter the appropriate starting date in the Select Start Date field or click the Calendar icon to select a date.

4. Enter the appropriate ending date in the Select End Date field or click the Calendar icon to select a date.

5. Click the Download Report button.
   
   The report downloads all assessment data within the date range. Data includes name of employee, competencies assessed, self-rated score, and any manager/coach score.

**To download the Competency Model report, do the following:**

1. Click Competencies.
   
   The Checkpoint Learning Competency Model home page appears.

2. Click Reports from the Manage Competency Model menu on the left side panel.
   
   The Reports page appears.

3. In the Competency Model section, click the Download Competency Model link.
   
   MS Excel opens the Competency Model report file.
**View Assessment Results and Add Feedback**

Firm Administrators can view assessment reports, view the team’s assessment reports, print assessment reports, and add feedback to assessment reports.

**To view assessment results:**

1. Click Competencies.
   
   The **Checkpoint Learning Competency Model** home page appears.

2. Click My Assessment Results from the View Competency Model menu on the left side panel.
   
   The **My Assessment Results** page appears with a list of all previously completed assessments.

3. Click to view the desired assessment report.
   
   The **Display Assessment Results** page appears.

   **Note:** The report shows the employee’s name, employee type, proficiency ratings, evaluation and assessment ratings.

4. To print an assessment report, click the **Print** button.
   
   **Note:** There are two **Print** buttons, one in the upper right corner of the report and one at the bottom of the report.

**To add feedback to assessment results:**

1. Click Competencies.
   
   The **Checkpoint Learning Competency Model** home page appears.

2. Click My Assessment Results from the View Competency Model menu on the left side panel.
   
   The **My Assessment Results** page appears with a list of all previously completed assessments.

3. Click the desired assessment report to add feedback.
   
   The **Display Assessment Results** page appears.

4. Click the **Add feedback** button.
   
   The **Display Assessment Results** page changes to allow feedback.

5. For each competency, click the **Your Rating** drop-down list and select the proficiency rating that best applies to the employee.

6. For each competency, click the **Desired Rating** drop-down list and select the proficiency rating that best applies to the employee.

7. On completion, click the **Save** button at the bottom of the report.
   
   The model displays the assessment with the feedback results.
**Note:** To correct a mistake and update the ratings again, click **Update your results** at the bottom of the report. Make the updates and click the **Save** button again.
About Branding

Your CLMS can easily be customized and branded to your corporate/firm identity. With just a few clicks you can create a unique banner, menu bar, homepage, add RSS feeds from your firm’s social media accounts and more.
# About Administrator and Professional Settings

Checkpoint Learning enables Firm Administrators to control administrator and employee access to Thomson Reuters products, news, and announcements published on the employee's Homeroom, tools and links for your employees, and other preferences.

You can edit the administrator and employee custom settings at any time.

<table>
<thead>
<tr>
<th>News / Announcements Section of Professional Home</th>
<th>Appears as the first section on the employee's Homeroom. Use this section to publish firm announcements and updates.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tool / Links Section of Professional Home</td>
<td>Appears under the Course Search section on the left side panel on the employee's Homeroom. Use this section to publish firm tools, widgets, or twitter updates.</td>
</tr>
<tr>
<td>Other Preferences</td>
<td>Enables a display of either the room or city location for each course activity on the Live Learning calendar.</td>
</tr>
</tbody>
</table>

## Professional Settings

Enables the administrator to turn on/off the following features from view or use by the firm's employees:

- Course Finder
- Checkpoint
- Online Grading
- AD Banner
- TRTA News & Updates
- Shopping Cart
- Training & CPE Solutions

## Administrator Settings

Enables the administrator to turn on/off the following features from view or use by the firm's administrators:

- Course Finder
- Online Grading
- AD Banner
- TRTA News & Updates
- Shopping Cart
- Training & CPE Solutions
Edit Administrator and Professional Custom Settings

Learn how to edit the administrator and professional custom settings at any time using the following steps.

To edit custom settings, do the following:

1. Click Settings.
2. Click Custom Settings from the Settings Menu on the left side panel.
3. Click Edit Custom Settings from the Settings Menu.
4. In the News/Announcements Section of Professional Home section, edit or confirm the following as needed:
   - Title – Enter or confirm the news/announcement title.
   - Publish Start Date – Enter or confirm the date on which to start publishing the news or announcements. Use the format MM/DD/YYYY. Or click the Calendar icon and select a date.
   - Publish End Date – Enter or confirm the date on which to stop publishing the news or announcements. Use the format MM/DD/YYYY. Or click the Calendar icon and select a date.
   - Content – Enter or confirm the content in the text box.
5. In the Tools/Links Section of Professional Home section, edit or confirm the following as needed:
   - Title – Enter or confirm the news/announcement title.
   - Publish Start Date – Enter or confirm the date on which to start publishing the news or announcements. Use the format MM/DD/YYYY. Or click the Calendar icon and select a date.
   - Publish End Date – Enter or confirm the date on which to stop publishing the news or announcements. Use the format MM/DD/YYYY. Or click the Calendar icon and select a date.
   - Content – Enter or confirm the content in the text box.
6. In the Other Preferences section, select Room or City from the drop-down list to post the room or city location in each course activity on the Live Learning Calendar.
7. In the Professional Settings section, select the check box to turn on the following:
   - Course Finder
   - Checkpoint
   - Online Grading
   - Ad Banner
   - TRTA News & Updates
- Shopping Cart
- Training & CPE Solutions

8. In the **Administrator Settings** section, select the check box to turn on the following:
   - Course Finder
   - Online Grading
   - Ad Banner
   - TRTA News & Updates
   - Shopping Cart
   - Training & CPE Solutions

9. In the **Employee Content Assignment** section, select **Checked** from the drop down menu to set the Content Assignment default to automatically be selected when adding an employee.

10. Click the **Submit** button.
    The selected settings are saved.
Change the Secret Key

Checkpoint Learning enables the administrator to change the secret key that is used to secure the firm’s data and to authenticate single sign-on requests. For more information regarding the secret key, contact Customer Support at 1.800.431.9025.

To change the secret key, do the following:

1. Click Settings.
2. Click Change Secret Key from the Settings Menu on the left side panel.
3. Enter the following in the Secret Key Details section:
   - Current Secret Key – Enter the current secret key number.
   - New Secret Key – Enter the new secret key number.
   - Confirm New Secret Key – Enter the new secret key number again.

   **Note:** The secret key must contain at least six characters.

4. Click the Submit button.
Create Automatic Compliance or Learning Plan Reminders

Checkpoint Learning enables the administrator to create email policies, reminders, or notifications to the employees, at a specified time for selected employees and regulators.

To create an email policy, do the following:

1. Click **Settings**.
2. Click **Email Settings** from the **Settings Menu** on the left side panel.
3. Click **Add Email Policy** from the **Settings Menu**.
4. In the **Basic Settings** section, enter the following information:
   - **Policy Name** – Enter a name to describe the email policy.
   - **Coach Policy** – Select the check box to apply this policy to administrators with a Coach role.
     
     **Note:** Coaches receive an email report summarizing the compliance status for their team members for which the Compliance Email privilege was selected. The report looks very similar to the Compliance Manager.
   
   - **Next Email Date** – Enter the date (format MM/DD/YYYY) to indicate the next date for email reminders to be sent to employees. Or click the **Calendar** icon to select a date.
     
     **Note:** Emails are sent at 9 p.m. Eastern Time. Once emails are sent, the next email date is rolled forward as determined by the Frequency setting.
   
   - **Frequency** – Select the frequency from the drop-down list.
   - **Reply Address** – Enter a specific return email address.
   - **CC Addresses** – Enter an email address to be copied on all automatic email reminders.
     
     **Note:** To carbon copy (CC) multiple addresses, enter separate email addresses with commas in the CC Address field.
   
   - **Subject Line** – Enter a subject for the email policy.
   - **Learning Plan Policy** – Select the check box to apply this policy to administrators with a Learning Plan.
   - **Send Incomplete Items Only** – Select the check box to send incomplete items to administrators.
   - **Email Message** – Enter the message for your recipients in the text box.
5. In the **Regulator Filter** section, enter the following information:

- **Release Timing** – Select the release timing setting. Release timing determines whether a particular status report will be sent as determined by the difference in the number of days between the Next Email Date of the policy and the deadline of the status report.
  
  - Choose "None" if you want the status report’s deadline to not be taken into account when determining which status reports to send.
  
  - Choose "No earlier than . . ." if you want status reports to not be sent unless there are "X" days or less remaining prior to the status report’s deadline.
  
  - Choose "Exactly . . ." if you want the status reports to not be sent unless there are exactly "X" days remaining prior to the status report’s deadline.

- **Credits Needed Criteria** – Select the check box for the email policy to be sent only to those who have status report deficits.

- **Regulators in Accountancy** – Select the regulators for which this email policy applies.

- **Regulators in Law** – Select the regulators for which this email policy applies.

6. In the **Administrative Group Filter** section, enter the following information:

- **Administrative Groups** – Select the administrative groups for which this email policy applies.

- **Group Relationship** – Select And or Or. An "Or" relationship includes any status reports of employees who are members of any of the selected administrative groups. An "And" relationship includes status reports of only those employees who are members of each of the selected administrative groups.

7. Click the **Submit** button.
Edit an Email Policy

Checkpoint Learning enables administrators to edit email policies.

To edit an email policy, do the following:

1. Click Settings.

2. Click Email Settings from the Settings Menu on the left side panel.

3. Click the Edit icon for the desired email policy.

4. In the Basic Settings section, edit or confirm the following information:
   - Policy Name – Edit or confirm a name to describe the email policy.
   - Coach Policy – Select the check box to apply this policy to administrators with a Coach role.
     
     **Note:** Coaches receive an email report summarizing the compliance status for their team members for which the Compliance Email privilege was selected. The report looks very similar to the Compliance Manager.

   - Next Email Date – Edit or confirm the date (format MM/DD/YYYY) to indicate the next date for email reminders to be sent to employees.

     **Note:** Emails are sent at 9 p.m. Eastern Time. Once emails are sent, the next email date is rolled forward as determined by the Frequency setting.

   - Frequency – Select the frequency from the drop-down list.

   - Reply Address – Edit or confirm a specific return email address.

   - CC Addresses – Edit or confirm an email address to be copied on all automatic email reminders.

     **Note:** To carbon copy (CC) multiple addresses, enter separate email addresses with commas in the CC Address field.

   - Subject Line – Edit or confirm a subject for the email policy.

   - Email Message – Edit or confirm the message for the intended recipients in the text box.

5. In the Regulator Filter section, edit or confirm the following information:

   - Release Timing – Edit or confirm the release timing setting. Release timing determines whether a particular status report will be sent as determined by the difference in the number of days between the Next Email Date of the policy and the deadline of the status report.
• Choose "No earlier than . . ." to not send status reports unless there are "X" days or less remaining prior to the status report’s deadline.

• Choose "Exactly . . ." to not send status reports unless there are exactly "X" days remaining prior to the status report’s deadline.

• Choose "None" to not take into account the status report’s deadline when determining which status reports to send.

• **Credits Needed Criteria** – Select the check box for the email policy to be sent only to those who have status report deficits.

• **Regulators in Accountancy** – Select the regulators for which this email policy applies.

• **Regulators in Law** – Select the regulators for which this email policy applies.

6. In the **Administrative Group Filter** section, edit or confirm the following information:

   • **Administrative Groups** – Select the administrative groups for which this email policy applies.

   • **Group Relationship** – Select And or Or to determine the group relationship. An "Or" relationship includes any status reports of employees who are members of any of the selected administrative groups. An "And" relationship includes status reports of only those employees who are members of each of the selected administrative groups.

7. Click the **Submit** button.
Add a Location

Checkpoint Learning enables the administrator to add multiple office locations as a preset location for the Firm's course activities.

To add a preset location, do the following:

1. Click Settings.
2. Click Locations from the Settings Menu on the left side panel.
3. Click Add Location from the Settings Menu located on the left side panel.
4. Enter the following information in the fields:
   - **Name** – Enter the name of the location.
   - **Address 1** – Enter the location number and street.
   - **Address 2** – Enter additional location address information if necessary.
   - **City** – Enter the city name.
   - **State/Province** – Select the state from the drop-down list.
   - **Postal Code** – Enter the location’s postal code.
   - **Country** – Select the country from the drop-down list.
5. Click the Submit button.
Edit a Location

After creating a location, edit it at any time using the steps below.

To edit a location, do the following:

1. Click Settings.
2. Click Locations from the Settings Menu on the left side panel.
3. Click the Edit icon associated with the desired location.
4. Edit or confirm any of the location detail fields as needed:
   - **Name** – Edit or confirm the name of the location.
   - **Address 1** – Edit or confirm the location number and street.
   - **Address 2** – Edit or confirm additional location address information.
   - **City** – Edit or confirm the city name.
   - **State/Province** – Edit or confirm the state selected from the drop-down list.
   - **Postal Code** – Edit or confirm the location's postal code.
   - **Country** – Edit or confirm the country selected from the drop-down list.

5. Click the Submit button to save changes.
Delete a Location

After creating a location, delete it at any time using the steps below.

To delete a location, do the following:

1. Click Settings.
2. Click Locations from the Settings Menu located on the left side panel.
3. Click the Delete icon for the desired location.
4. Click OK to confirm deletion of the course activity location.
Add a Parameter

Checkpoint Learning enables the administrator to create parameters, a feature that provides more customization to your certificate templates within the University module.

**To add a parameter, do the following:**

1. Click **Settings**.
2. Click **Parameters** from the **Settings Menu** on the left side panel.
3. Click **Add Parameter** from the **Settings Menu**.
4. Select a **Certificate Template** from the certificate template drop-down menu.
5. Enter the **Value** that you would like to display on your certificate template.
6. Click the **Submit** button.
7. To review this information, click **University**, then click on a **Course Activity Profile** and then proceed to click on **Forms** and view the certificate template. Alternatively, click on **certificate**, then issue certificate and you can issue the certificate and view it.
Edit a Parameter

After adding a parameter, edit it at any time using the steps below.

To edit a parameter, do the following:

1. Click Settings.
2. Click Parameters from the Settings Menu on the left side panel.
3. Click the Edit icon 🍃 for the respective parameter.
4. Edit or confirm the following information as needed:
   - **Name** – Edit or confirm the name for the parameter.
   - **Value** – Edit or confirm the value for the parameter.
5. Click the Submit button to save changes.
Delete a Parameter

After you create a parameter, you can delete it at any time using the steps below.

To delete a parameter, do the following:

1. Click Settings.
2. Click Parameters from the Settings Menu located on the left side panel.
3. Click the Delete icon for the desired parameter.
4. Click OK to confirm deletion of the selected parameter.
Applying Logo to a Certificate

Checkpoint Learning enables the administrator to apply a logo to the certificate.

To apply a logo to your certificate do the following:

1. Click Settings.
2. Click Upload Logo.
3. If you have already applied a logo, select the college name from the college drop-down menu, select the logo and click Submit.
4. To upload a new logo, click Browse and select a logo from your computer and click Upload.
5. To associate the logo with a certificate, you will be required to associate it with a college. Select a college name from the College Name drop-down menu.
6. Then select a logo from the Logo to associate drop-down menu. This menu contains the list of logos that have been uploaded.
7. Click Submit.
**View Signatures**

Checkpoint Learning enables administrators to select a signature to attach to the in-house sponsored program’s certificates. It is possible to have multiple signatures and multiple certificate templates.

**Note:** Each administrator account can have only one signature per account to issue certificates.

To view signatures, do the following:

1. Click **Settings**.
2. Click **Signatures** from the **Settings Menu** on the left side panel.
3. Click the name of the desired signature.

For more information regarding signatures, contact Customer Support at 1.800.431.9025.
Add CE Tracking Industries

Checkpoint Learning enables the administrator to track accountancy and legal regulators. To do so, all appropriate industries must have been added to your firm account.

To add an industry, do the following:

1. Click Settings.
2. Click Industries from the Settings Menu on the left side panel.
3. Click the Add icon for the desired industry.
Delete CE Tracking Industries

A CE tracking industry can be deleted at any time using the steps below.

To delete a CE tracking industry, do the following:

1. Click **Settings**.
2. Click **Industries** from the **Settings Menu** on the left side panel.
3. Click the **Delete** icon for the desired industry.
Add a Sponsor

Checkpoint Learning enables the administrator to enter preset sponsors for non-firm sponsored activities taken by the employees.

To add a sponsor, do the following:

1. Click **Settings**.
2. Click **Sponsors** from the **Settings Menu** on the left side panel.
3. Click **Add Sponsor** from the **Settings Menu**.
4. Enter the following information:
   - **Name** – Enter the sponsor name.
   - **Sponsor Number** – If applicable, enter the sponsor number.
   - **Address** – Enter the sponsor address.
   - **City** – Enter the sponsor city.
   - **State** – Enter the sponsor state.
   - **Zip** – Enter the sponsor zip code.
   - **Phone No.** – Enter the sponsor phone number.

5. Click the **Submit** button.

The new sponsor profile is added to the **Sponsors** page.
Edit a Sponsor

After adding a sponsor, edit it at any time using the steps below.

To edit a sponsor, do the following:

1. Click Settings.
2. Click Sponsors from the Settings Menu on the left side panel.
3. Click Edit icon for the desired sponsor profile.
4. Confirm or edit the following information as needed:
   - **Name** – Confirm or edit the sponsor name.
   - **Sponsor Number** – Confirm or edit the sponsor number.
   - **Address** – Confirm or edit the sponsor address.
   - **City** – Confirm or edit the sponsor city.
   - **State** – Confirm or edit the sponsor state.
   - **Zip** – Confirm or edit the sponsor zip code.
   - **Phone No.** – Confirm or edit the sponsor phone number.
5. Click the Submit button.
   
The sponsor profile is updated with the changes.
Delete a Sponsor

After adding a sponsor, they can be deleted at any time using the steps below.

**To delete a sponsor, do the following:**

1. Click **Settings**.
2. Click **Sponsors** from the **Settings Menu** on the left side panel.
3. Click **Delete** icon for the desired sponsor profile.
4. Click **OK** to confirm deletion of the sponsor.
Add an Administrator Account

Checkpoint Learning enables administrators to add administrator accounts. Administrator accounts enable the Firm to control the data within your Checkpoint Learning account.

Administrator Account Functions

Administrator accounts can have any or all of the functions listed in the following table.

<table>
<thead>
<tr>
<th>Administrator Role</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System Administrator</strong></td>
<td>Administrators assigned the System Administrator role can:</td>
</tr>
<tr>
<td></td>
<td>• Create, edit, and delete other administrator accounts.</td>
</tr>
<tr>
<td></td>
<td>• Create, edit, and delete administrative groups.</td>
</tr>
<tr>
<td></td>
<td>• Create, edit, and delete email policies.</td>
</tr>
<tr>
<td></td>
<td>• Reset the organization’s secret key.</td>
</tr>
<tr>
<td></td>
<td>• Change the organization’s default industries.</td>
</tr>
<tr>
<td></td>
<td>• Generate and download the organization’s data export.</td>
</tr>
<tr>
<td><strong>University Registrar</strong></td>
<td>Administrators assigned the University Registrar role can add, edit, delete, and manage the records associated with the University module.</td>
</tr>
<tr>
<td><strong>Seat Manager</strong></td>
<td>Administrators assigned the Seat Manager role can:</td>
</tr>
<tr>
<td></td>
<td>• Add new employees to the organization account.</td>
</tr>
<tr>
<td></td>
<td>• Remove employees from the organization account.</td>
</tr>
<tr>
<td></td>
<td>• Manage settings related to the employee’s account profile, such as username, password, email address, and groups.</td>
</tr>
<tr>
<td><strong>CE Manager</strong></td>
<td>Administrators with the CE Manager role can view the records associated with all employee accounts.</td>
</tr>
<tr>
<td><strong>Coach</strong></td>
<td>Administrators with the Coach role can be granted the following privileges concerning the members of their team:</td>
</tr>
<tr>
<td></td>
<td>• Add, edit, and delete items on team members’ learning plans.</td>
</tr>
<tr>
<td></td>
<td>• Receive automated email reports summarizing team members’ continuing education compliance status.</td>
</tr>
<tr>
<td></td>
<td>• Receive automated email messages when team members register for University Course Activities.</td>
</tr>
<tr>
<td></td>
<td>• Veto team member registrations.</td>
</tr>
<tr>
<td></td>
<td>Administrators with only the role of Coach may view only members of their team.</td>
</tr>
</tbody>
</table>
### Administrative Groups for the CE Manager Role

Administrators granted the CE Manager role can add, edit, and delete Activity and Status Report records of employees in the selected Administrative Groups.

<table>
<thead>
<tr>
<th>Administrative Groups for the CE Manager Role</th>
<th>Administrators granted the CE Manager role can add, edit, and delete Activity and Status Report records of employees in the selected Administrative Groups.</th>
</tr>
</thead>
</table>

### Add an Administrator Account

To add an administrator account, do the following:

1. Click **Settings**.
2. Click **Administrator Settings** from the **Settings Menu** on the left side panel.
3. Click **Add Administrator** from the **Settings Menu**.
4. In the **Administrator Details** section, enter the following information:
   - **Username** – Enter the administrator user name.
   - **Password** – Enter the administrator password.
   - **Confirm Password** – Enter the administrator password again.
   - **Full Name** – Enter the administrator's first and last name.
   - **Email Address** – Enter the administrator’s email address.
   - **Time Zone** – Select the appropriate time zone from the drop-down list.
5. In the **Administrator Roles** section, select the appropriate check boxes for the administrator roles:
   - System Administrator
   - University Manager
   - Employee Manager
   - Compliance Manager
   - Coach
   
   **Note**: Coach can only be selected by itself. If Coach is selected, the other options are not available. If any of the other options are selected, Coach is not available.

6. In the **Settings for the University Manager Role** section, select a signature from the drop-down list. The selected signature will display on the in-house Firm sponsored certificates issued to employees.

7. In the **Settings for the Compliance Manager Role** section, select the administrative groups that the Administrator should have read/write access to. Use the arrows move groups from the Not Selected list to the Selected list.
8. In the **Compliance Manager Preferences** section, enter the following information:

- **Compliance Deadline Range** – Select the compliance range to be viewed on the Administrator's Compliance Manager (home page) from the drop-down list.

- **Includes "Incompletes"?** – Select Yes or No to include regulators that have not been set up to completion for one or more employees.

- **Credit Needed** – Select All Values or Deficits Only to display compliant and/or deficient credit amounts for the selected regulators.

- **Exclude those with no Administrative Group** – Select the check box to display the employees who have not been added to an administrative group.

- **Administrative Groups** – Select the administrative groups to enable full control for the administrator account. Use the arrows move groups from the Not Selected list to the Selected list.

- **Regulators in Accountancy** – Select the regulators to be viewed on the Administrator's Compliance Manager (home page). Use the arrows move groups from the Not Selected list to the Selected list.

- **Regulators in Law** – Select the regulators to be viewed on the Administrator's Compliance Manager (home page). Use the arrows move groups from the Not Selected list to the Selected list.

- **Sort By** – Select an option from the drop-down list. The option selected determines how employees are sorted on the Administrator’s Compliance Manager (home page).

9. In the **Course Activity List Preferences** section, enter the following information:

- **Start Date Range** – Select a date range from the drop-down list. The option selected determines how course activities are displayed on the Course Activities page.

- **Parameters** – Select All, Enabled Only, or Disabled Only from the drop-down list. The option selected determines which course activities are displayed in the Course Activities page.

- **Formats** – Select the formats to display in the Course Activities page. Use the arrows move groups from the Not Selected list to the Selected list.

- **Sort By** – Select an option from the drop-down list. The option selected determines how course activities are sorted on the Administrator's Course Activities page.

10. Click the **Next** button.

    The new Administrator Profile appears with all the settings that were selected.
Edit an Administrator Account

After adding an administrator account, edit it at any time using the steps below.

To edit an administrator account, do the following:

1. Click Settings.
2. Click Administrator Settings from the Settings Menu on the left side panel.
3. Click the Edit icon for the administrator account.
4. In the Administrator Details section, confirm or edit the following information:
   - **Full Name** – Confirm or edit the administrator's first and last name.
   - **Email Address** – Confirm or edit the administrator's email address.
   - **Signature** – Confirm or select a signature from the drop-down list. The selected signature displays on the in-house Firm sponsored certificates issued to employees.
   - **Time Zone** – Confirm or select the appropriate time zone from the drop-down list.
5. In the Administrator Roles section, confirm or select the check boxes for the administrator roles:
   - System Administrator
   - University Manager
   - Employee Manager
   - Compliance Manager
   - Coach

   **Note:** Coach can only be selected by itself. If Coach is selected, the other options will not be available. If any of the other options are selected, Coach will not be available.

6. In the Settings for the University Manager Role section, confirm or select a signature from the drop-down list.
7. In the Settings for the Compliance Manager Role section, confirm or select the administrative groups the Administrator should have read/write access to. Use the arrows move groups from the Not Selected list to the Selected list.
8. In the Compliance Manager Preferences section, enter the following information:
   - **Compliance Deadline Range** – Confirm or select the compliance range to be viewed on the Administrator's home page from the drop-down list.
   - **Includes "Incompletes"?** – Confirm or select Yes or No to include regulators that have not been set up to completion for one or more employees.
• **Credit Needed** – Confirm or select All Values or Deficits Only to display compliant and/or deficient credit amounts for the selected regulators.

• **Exclude those with no Administrative Group** – Confirm or select the check box to display the employees who have not been added to an administrative group.

• **Administrative Groups** – Confirm or select the administrative groups to enable full control for the administrator account. Use the arrows move groups from the Not Selected list to the Selected list.

• **Regulators in Accountancy** – Confirm or select the regulators to be viewed on the Administrator’s Compliance Manager (home page). Use the arrows move groups from the Not Selected list to the Selected list.

• **Regulators in Law** – Confirm or select the regulators to be viewed on the Administrator’s Compliance Manager (home page). Use the arrows move groups from the Not Selected list to the Selected list.

• **Sort By** – Confirm or select an option from the drop-down list. The option selected determines how employees are sorted on the Administrator’s Compliance Manager (home page).

9. In the **Course Activity List Preferences** section, enter the following information:

   • **Start Date Range** – Confirm or select a date range from the drop-down list. The option selected determines how course activities are displayed on the Course Activities page.

   • **Parameters** – Confirm or select All, Enabled Only, or Disabled Only from the drop-down list. The option selected determines which course activities are displayed in the Course Activities page.

   • **Formats** – Confirm or select the formats to display in the Course Activities page. Use the arrows move groups from the Not Selected list to the Selected list.

   • **Sort By** – Confirm or select an option from the drop-down list. The option selected determines how course activities are sorted on the Administrator’s Course Activities page.

10. Click the **Next** button.

The updated Administrator Profile is displayed with all the settings that were selected.
Delete an Administrator Account

After creating an administrator account, it can be deleted at any time using the steps below.

To delete an administrator account, do the following:

1. Click Settings.
2. Click Administrator Settings from the Settings Menu on the left side panel.
3. Click the Delete icon for the desired administrator account.
4. Click OK to confirm deletion of the administrator account.
Add an Administrative Group

Checkpoint Learning enables the administrator to track their employees by creating administrative groups. By assigning specific employees to an administrative group, you can sort the list of employees by the selected administrative group to send out invitations, compliance emails, status reports, and registration emails.

Note: Examples of administrative groups include office locations, employee titles, and firm departments.

To add an administrative group, do the following:

1. Click Settings.
2. Click Administrative Groups from the Settings Menu on the left side panel.
3. Click Add Administrative Group from the Settings Menu.
4. In the Administrative Group Details section, enter the following information:
   - Name – Enter the name of the administrative group.
   - Add for all firm course activities – Select Yes or No to add the administrative group to all created future activities.
5. In the Employees section, select the check box for the employees who belong in the administrative group.
6. Click the Submit button.
Edit an Administrative Group

After adding an administrative group, edit it at any time using the steps below.

To edit an administrative group, do the following:

1. Click **Settings**.
2. Click **Administrative Groups** from the **Settings Menu** on the left side panel.
3. Click the **Edit icon** for the desired administrative group.
4. In the **Edit Administrative Group** section, edit or confirm the following as needed:
   - **Group Name** – Edit or confirm the name of the administrative group.
   - **Add to all Course Activities** – Select Yes, No, or Keep Existing Permission Status.
5. In the **Employees** section, select the check box for the employees who belong in the administrative group.
6. Click the **Submit** button to save your changes.
Delete an Administrative Group

After creating an administrative group, it can be deleted at any time using the steps below.

**To delete an administrative group, do the following:**

1. Click **Settings**.
2. Click **Administrative Groups** from the **Settings Menu** on the left side panel.
3. Click the **Delete** icon for the desired administrative group.
4. Click **OK** to confirm deletion of the administrative group.
Change Your Administrator Password

Checkpoint Learning enables the administrator to change the password.

To change the administrator password, do the following:

1. Click Settings.
2. Click Administrator Settings from the Settings Menu on the left side panel.
3. Click Change Admin. Password from the Settings Menu.
4. Enter the following information:
   - **Current Password** – Enter the current administrator password.
   - **New Password** – Enter the new administrator password.
   - **Confirm New Password** – Enter the new administrator password again.
5. Click the Submit button.

**Note:** For administrators without system admin rights, clicking Settings and then changing the password is the only option.
Recover Your Administrator User Name or Password

If you have forgotten your Checkpoint Learning Administrator 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:

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:

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.
Import Data

Checkpoint Learning allows administrators to import professional data. Excel Templates can be downloaded and edited to include employee data before being uploaded.

To select data to import, do the following:

1. Click Settings.
2. Click Data Import from the Settings menu on the left navigation pane.
3. In the Data Import section, select the Import Type.
   The page refreshes to update the Download hyperlink.
4. Click Download.
   Edit the downloaded template to include professional data.
5. Click Choose File.
6. Navigate to the location of the file in your computer, select it and click open.
   The Progress bar shows the progress level of the import process.
7. Click Submit.
Export Data

Checkpoint Learning enables administrators to select and export data from the Firm’s organization account. After the data is selected, the information is stored in a hyperlink within the Checkpoint Learning Administrator account. The hyperlink contains the selected data in an MS Access database. Once downloaded, various reports can be run from the MS Access database.

Follow these guidelines when exporting data:

- **Date After** – Enter a date in the MM/DD/YYYY format to export data after a certain date.
- **Accountancy** – Select one or more regulators to limit the data pulled to just the selected regulator(s).
- **Law** – Select one or more regulators to limit the data pulled to just the selected regulator(s).

**Note:** If you choose to filter your data by using the Date After field, Checkpoint Learning automatically selects all regulators unless you identify specific regulators in Accountancy and Law. If you choose to filter your data by a specific regulator, Checkpoint Learning pulls only those records that contain information based on the regulators you selected.

To select data to export, do the following:

1. Click **Settings**.
2. Click **Data Export** from the **Settings Menu** on the left side panel.
3. In the **Activity Filter** section, enter the following information:
   - **Date After** – Enter the date from which the system should begin to pull records. Records will be pulled from the date entered to the current date.
   - **Accountancy** – Select one or more regulators to limit the data pulled to just the selected regulator(s). Use the arrows to move regulators from the Not Selected list to the Selected list.
   - **Law** – Select one or more regulators to limit the data pulled to just the selected regulator(s).
4. Click the **Generate Database** button.

**Note:** After clicking Generate Database, please be patient. Depending on the amount of data associated with the organization, creation of the database can take 30 minutes or more. Please feel free to come back to this page later. A hyperlink to the newly-generated database will be available to initiate the download.

To export data:

1. Click **Settings**.
2. Click **Data Export** from the **Settings Menu** on the left side panel.
3. In the **Data Export** section, click the **Export File** hyperlink.
4. Click **Save**.
5. Select a location on the computer to save the compressed (zip) file.
6. Click the **Save** button.

**Note:** After saving the compressed (zip) file, extract the file in order to run reports.

**To extract the data from the compressed (zip) file:**

1. Locate the compressed file saved on the computer.
2. Right-click the compressed file and select **Extract to**.
3. Select a location on the computer to save the extracted file.
4. Click **Extract**.

   The extracted MS Access file is saved to the selected location.
View Log Entries (Administrator Input)

Checkpoint Learning enables professionals to track the data entered by administrators. Each time an administrator logs into the Firm’s account and creates, edits, or deletes data, the action is captured as a log entry and stored within the Firm account.

To view log entries, do the following:

1. Click **Settings**.
2. Click **Log Entries** from the **Settings Menu** located on the left side panel.
3. Do any of the following actions:
   - Click the **single arrows** to move forward or backwards through the log entries.
   - Click **Timestamp** to sort the log entries by date and time of action.
   - Click **Action** to sort the log entries by the action accomplished.
   - Click **Category** to sort the log entries by category of action accomplished.
   - Click **Actor** to sort the log entries by Administrator.
   - Click the **date and time** of a log entry to view the Log Entry Profile.
View the Status Report Questionnaires

How to view the accountancy and legal status report questionnaires at any time.

To view the status report questionnaires, do the following:

1. Click Settings.

2. Click Administrator Settings from the Settings Menu on the left side panel.

3. Click Docs for Administrators from the Settings Menu.

4. Click the hyperlinks to view the available documents.

5. Select the regulator name of the desired questionnaire.
Submit your Firm Logo

Checkpoint Learning allows firms to customize their accounts with their firm logo. Logos must be submitted as jpeg or tgif attachments. Once you upload the logo, the system will re-size and populate it in its respective places.

Each time a logo is attached it will overwrite the previously uploaded logo.

The following specifications have to be followed when uploading a logo file:

- Dimensions- maximum 975 px wide and maximum 200 px high
- File Size can be equal to or less than 30kB

To add a logo, do the following:

1. Click **Settings**.
2. Click **Add Logo** from the settings Menu, on the left side panel.
3. On the **Add Logo** screen, click **Browse**.
   A dialogue box opens. Navigate to the location of the file in your computer and click **open**.
   The dialog box closes.
4. Click **Upload**.
Add/Edit Signature

To add/edit signatures, do the following:

1. Click Settings.

2. Click Add Signatures, from the Settings Menu on the left side panel.

3. On the Add Signatures screen, click Browse.
   A dialog box opens. Navigate to the location of the file in your computer and click open.
   The dialog box closes.

4. Click Upload.
   The uploaded signature will be displayed on the Signature screen.

The following specifications have to be followed when uploading a signature file:

- Dimensions- maximum 975 px wide and maximum 200 px high
- File Size can be equal to or less than 30KB
Resources for Firm Administrators

Learn more about the continuing education rules for over 130 accountancy and legal regulators in Resources. The accountancy and law jurisdictions are reviewed and updated regularly to ensure the most up-to-date information is displayed.

To view rules for accountancy regulators do the following:

1. Click Resources.
2. In the Accountancy section, select a regulator from the drop-down list.
3. Click the Go button.
   
   The Status Report Tracking Message page appears with the Regulator Details and Rules for Professionals.
4. Review the rules in two ways:
   
   • Scroll down the page to read through the rules.
   
   • In the Rule Summary Contents on the left side panel, click a topic to jump directly to the topic’s information on the page.

To view rules for legal regulators, do the following:

1. Click Resources.
2. In the Law section, select a regulator from the drop-down list.
3. Click the Go button.
   
   The Status Report Tracking Message page appears with the Regulator Details and Rules for Professionals.
4. Review the rules in two ways:
   
   • Scroll down the page to read through the rules.
   
   • In the Rule Summary Contents on the left side panel, click a topic to jump directly to the topic’s information on the page.
About Reporting

Checkpoint Learning enables Firm Administrators to generate reports about the firm’s employees, their licenses, online learning, and courses offered and taken. These reports found within Checkpoint Learning are exportable to excel. The Export to Excel button is typically found in the right hand side of each report. Each Checkpoint Learning module comes with reporting ability. This document reviews the different reporting options for each module within Checkpoint Learning.

In addition to these reports, Checkpoint Learning also offers the ability to extract data from the firm account and run customized reports on the firm’s data. In order to run customized reports, MS Access is required as the firm data is provided in a MS Access database.

Compliance Manager

The Compliance Manager page serves as the Firm Administrator’s home page. It provides a report of selected staff’s compliance status, including compliance deadline and number of credits needed to maintain compliance. The report filtering section on the left side panel enables filtering of the report by employee, regulator, deadline and more.

To view whether employees have met specific requirements within a regulator, do the following:

1. From the Compliance Manager, select a regulator from the Regulator (Categories) drop-down list in the Compliance Status title bar.
2. Click the Go button.
3. Select one or more check boxes to display the desired requirements.
4. Click the Submit button.

Employee Manager

The Employee Manager page displays selected staff and their employee account information including user name, employee title, office, department, number of bulk tracking seats (The tracking for subscription packages is observed in University under the Products Purchased section. This information can be exported to excel.), whether the employee has a learning seat, and whether the firm owns the employee’s account.

To view the Employee Manager report, do the following:

1. Click Employees.
2. Click Employee Manager from the Global Menu located on the left side panel.

Note: Use the Report Filtering feature on the left side panel to sort by employees or regulators.
Create On-Demand Reports

Checkpoint Learning provides customizable templates that can be edited to run reports on employees and their on-demand learning progress.

Note: See Use On-Demand Reports to see details about the available report templates.

To create a report, do the following:

1. Click Reporting.

2. In the Action column, click the Preview icon of the desired report.

3. Do any or all of the following, then click the View Report button:
   - Columns to Display - Select the checkboxes next to the desired columns from the drop-down list.
   - Course - Enter the title of the desired course.
   - Course ID - Enter the ID of the desired course.
   - College - Enter the college of the desired course.
   - Coordinator - Select the checkboxes next to the desired coordinator from the drop-down list.
   - Professional - Enter the first and/or last name of the employee.
   - Start/End/Evaluation/Credit/Examination/Course Completion Date - Select the calendar icon to choose date parameters.

Note: Not all options are available for every report.

4. Do any or all of the following:
   - First Page - Click to go to the first page.
   - Previous Page - Click to go to the previous page.
   - Next Page - Click to go to the next page.
   - Last Page - Click to go to the last page.
   - Find | Next - Enter keywords to find or click Next to view the next report.
   - Export - Click to export the report in different formats.
   - Refresh - Click to refresh the page.
Use Reporting To Generate Reports

Checkpoint Learning provides customizable templates to run reports on employees and their on-demand learning progress.

Several templates are available in Checkpoint Learning on Reporting. Click the following template names to view more information about how to run these reports.

**Accumulated Compliance per Category - Customer**

This report displays a list of professionals and the total number of CPEs they have earned within a specified time period displayed by a specified regulator.

<table>
<thead>
<tr>
<th>Available Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regulator Name</td>
<td>Indicates the way you want to display credits for the report.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Indicates the beginning of the date range you want to choose for your report.</td>
</tr>
<tr>
<td>End Date</td>
<td>Indicates the end date of the date range.</td>
</tr>
</tbody>
</table>

**Average Number of Attendees per Course**

This report lists the average number of attendees and direct deposits issued based on the organizations in-house courses.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg. Direct Deposits</td>
<td>Indicates the average number of direct deposits received for a course or course activity.</td>
</tr>
<tr>
<td>Avg. Registrants</td>
<td>Indicates the average number of employees received for a course or course activity.</td>
</tr>
<tr>
<td>College</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>University</td>
<td>Indicates the program source such as the firm's University and course options or Thomson Reuters University and course options.</td>
</tr>
<tr>
<td>Course</td>
<td>Indicates the program.</td>
</tr>
</tbody>
</table>

**Compliance Detailed Activity Info per Category - Customer**

This report lists each activity of each professional for a specified time period displayed by a specified regulator.

**Note:** To apply a data filter export the report to csv and then copy and paste to Microsoft Excel.

<table>
<thead>
<tr>
<th>Available Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regulator Name</td>
<td>Indicates the way you want to display credits for the report.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Indicates the beginning of the date range you want to choose for your report.</td>
</tr>
</tbody>
</table>

Note: In order to generate the report you must click the View Report button each time to refresh the data.
USE REPORTING TO GENERATE REPORTS

<table>
<thead>
<tr>
<th>Available Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>Indicates the end date of the date range.</td>
</tr>
</tbody>
</table>

Course "Starts" Report for Usage
This report lists launched on-demand courses.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Indicates the date a particular course activity was started.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Credits</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Account Name</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Account ID</td>
<td>Indicates the organization’s ID as assigned by Checkpoint Learning.</td>
</tr>
<tr>
<td>Professional</td>
<td>Indicates the name of the individual assigned to the record.</td>
</tr>
<tr>
<td>College</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Number of Course Titles</td>
<td>Indicates the total number count of course titles pulled within a search.</td>
</tr>
<tr>
<td>Number of Course IDs</td>
<td>Indicates the total number of course code fields that have data entered within a search.</td>
</tr>
<tr>
<td>Number of Professionals</td>
<td>Indicates the total number count of employees within a search.</td>
</tr>
<tr>
<td>Number of Colleges</td>
<td>Indicates the total number count of colleges within a search.</td>
</tr>
<tr>
<td>Number of Sponsors</td>
<td>Indicates the total number count of sponsors within a search.</td>
</tr>
</tbody>
</table>

Course Completion Report for Usage
This report lists completed on-demand course activities.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completion Date</td>
<td>Indicates the date a particular course activity was completed.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Credits</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Account Name</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Available Column</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Account ID</td>
<td>Indicates the organization’s ID as assigned by Checkpoint Learning.</td>
</tr>
<tr>
<td>Professional</td>
<td>Indicates the name of the individual assigned to the record.</td>
</tr>
<tr>
<td>College</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Number of Course Titles</td>
<td>Indicates the total number count of course titles pulled within a search.</td>
</tr>
<tr>
<td>Number of Course IDs</td>
<td>Indicates the total number of course code fields that have data entered within a search.</td>
</tr>
<tr>
<td>Number of Account Names</td>
<td>Indicates the total number count of the organizations that own the college/sponsor of the activity.</td>
</tr>
<tr>
<td>Number of Account ID</td>
<td>Indicates the total number count of the organization IDs assigned to the organization by Checkpoint Learning.</td>
</tr>
<tr>
<td>NASBA Field of Study</td>
<td>Indicates the field(s) of study applied to the course.</td>
</tr>
</tbody>
</table>

**Courses Ordered Report**

This report lists Thomson Reuters courses ordered by professionals and approved by coordinators.

**Note:** Firms who purchase the custom course order form will see data in this report.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinator</td>
<td>Indicates the name of the administrator for firms with custom order forms.</td>
</tr>
<tr>
<td>Professional</td>
<td>Indicates the name of the individual assigned to the record.</td>
</tr>
<tr>
<td>CLIN</td>
<td>Indicates the IRS number assigned to a course.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>CPE Credits</td>
<td>Indicates the number of hours earned for the program.</td>
</tr>
<tr>
<td>Course Request Date</td>
<td>Indicates the date the course was requested. This is used by firms with custom order forms.</td>
</tr>
<tr>
<td>Course Approval Date</td>
<td>Indicates the date the course was approved by the Coordinator. This is used by firms with custom order forms.</td>
</tr>
<tr>
<td>Course Request Status</td>
<td>Indicates the status or a course request: requested or approved.</td>
</tr>
<tr>
<td>Professional Email</td>
<td>Indicates the employees email address.</td>
</tr>
</tbody>
</table>

**Free Form Responses Report for Evaluations**

This report lists the data entered in the comment or text boxes in evaluations.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Date</td>
<td>Indicates the date in which the evaluation was completed by the</td>
</tr>
</tbody>
</table>
### Issued Credits Report for Usage

This report lists on completed on-demand courses that have credits issued to professionals.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Date</td>
<td>Indicates the date in which credit was issued to the employee.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Account Name</td>
<td>Indicates the number of credits earned by completing the course activity.</td>
</tr>
<tr>
<td>Account ID</td>
<td>Indicates the organization’s ID as assigned by Checkpoint Learning.</td>
</tr>
<tr>
<td>Professional</td>
<td>Indicates the name of the individual assigned to the record.</td>
</tr>
<tr>
<td>College</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>Regulator</td>
<td>Indicates the state or license or jurisdiction.</td>
</tr>
<tr>
<td>Number of Course Titles</td>
<td>Indicates the total number count of course titles pulled within a search.</td>
</tr>
<tr>
<td>Number of Course ID</td>
<td>Indicates the total number of course code fields that have data entered within a search.</td>
</tr>
</tbody>
</table>
### Available Column

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Account Names</td>
<td>Indicates the total number count of the organizations that own the college/sponsor of the activity.</td>
</tr>
<tr>
<td>Number of Account ID</td>
<td>Indicates the total number count of the organization IDs assigned to the organization by Checkpoint Learning.</td>
</tr>
<tr>
<td>Number of Professionals</td>
<td>Indicates the total number count of professionals within a search.</td>
</tr>
<tr>
<td>Number of Colleges</td>
<td>Indicates the total number count of colleges within a search.</td>
</tr>
<tr>
<td>Number of Sponsors</td>
<td>Indicates the total number count of sponsors within a search.</td>
</tr>
<tr>
<td>Number of Regulators</td>
<td>Indicates the number of states, licenses, or jurisdictions selected.</td>
</tr>
</tbody>
</table>

### Lists of What Professionals Have Registered For and Taken

This report lists the in-house courses your professionals have registered for or taken.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Indicates the name of the report.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Title</td>
<td>Indicates the title of the employee.</td>
</tr>
<tr>
<td>Department</td>
<td>Indicates the department of the employee.</td>
</tr>
<tr>
<td>Office</td>
<td>Indicates the office of the employee.</td>
</tr>
<tr>
<td>Course Started</td>
<td>Indicates an on-demand course.</td>
</tr>
<tr>
<td>Registered</td>
<td>Indicates a live course.</td>
</tr>
<tr>
<td>Direct Deposits</td>
<td>Indicates whether credits were issued for attending the course.</td>
</tr>
<tr>
<td>Live Event Date</td>
<td>Indicates the date of the live event.</td>
</tr>
<tr>
<td>Course Start Date</td>
<td>Indicates the date the on-demand course was started.</td>
</tr>
</tbody>
</table>

### Number of Attendees per Course Activity

This report lists the average number of attendees and direct deposits issued based on the organizations in-house courses.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course</td>
<td>Indicates the parent course title.</td>
</tr>
<tr>
<td>Course Activity Title</td>
<td>Indicates the course activity or program title.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Indicates the sponsor of the program, the organization authorized to issue certificates of completion.</td>
</tr>
<tr>
<td>Format</td>
<td>Indicates the format or mode in which a course was offered.</td>
</tr>
<tr>
<td>Completion Date</td>
<td>Indicates the date a course was completed.</td>
</tr>
<tr>
<td>#Registrants</td>
<td>Indicates the number of employees.</td>
</tr>
</tbody>
</table>
### Available Column

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>#Direct Deposits</td>
<td>Indicates the number of direct deposits; instances where credit was issued.</td>
</tr>
<tr>
<td>#Courses Started</td>
<td>Indicates the number of instances a course was started.</td>
</tr>
<tr>
<td>College</td>
<td>Indicates the provider of the course.</td>
</tr>
<tr>
<td>University</td>
<td>Indicates the University, either Thomson Reuters or Firm Sponsored.</td>
</tr>
</tbody>
</table>

### Numeric Responses Report for Evaluations

This report lists the data entered in course activity evaluations.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Date</td>
<td>Indicates the date an evaluation was answered.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Authors</td>
<td>Indicates the author of the program.</td>
</tr>
<tr>
<td>Instructor</td>
<td>Indicates the instructor of the program.</td>
</tr>
<tr>
<td>Evaluation Question</td>
<td>Indicates the evaluation question.</td>
</tr>
<tr>
<td>Evaluation Form Template</td>
<td>Indicates the evaluation template used to evaluate the program.</td>
</tr>
<tr>
<td>Evaluation Comments</td>
<td>Indicates the evaluation comments from a program.</td>
</tr>
<tr>
<td>Number of Course Titles</td>
<td>Indicates the total number count of course titles pulled within a search.</td>
</tr>
<tr>
<td>Number of Course ID</td>
<td>Indicates the total number of course code fields that have data entered within a search.</td>
</tr>
<tr>
<td>Number of Authors</td>
<td>Indicates the number of authors.</td>
</tr>
<tr>
<td>Number of Instructors</td>
<td>Indicates the number of instructors.</td>
</tr>
<tr>
<td>Number of Evaluation Questions</td>
<td>Indicates the number of evaluation questions.</td>
</tr>
<tr>
<td>% Answered with Option 1</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
<tr>
<td>% Answered with Option 2</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
<tr>
<td>% Answered with Option 3</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
<tr>
<td>% Answered with Option 4</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
<tr>
<td>% Answered with Option 5</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
<tr>
<td>% Answered with Option 6</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
<tr>
<td>% Answered with Option 7</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
<tr>
<td>% Answered with Option 8</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
<tr>
<td>% Answered with Option 9</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
<tr>
<td>% Answered with Option 10</td>
<td>Indicates the number of employees who responded with this option.</td>
</tr>
</tbody>
</table>
**Online Grading Examinations Usage**

This report lists the online grading exams completed by employees.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OGS Examination Name</td>
<td>Indicates the name of the online grading exam.</td>
</tr>
<tr>
<td>Professional</td>
<td>Indicates the name of the individual assigned to the record.</td>
</tr>
<tr>
<td>Title</td>
<td>Indicates the title of the employees.</td>
</tr>
<tr>
<td>Office</td>
<td>Indicates the office of the employees.</td>
</tr>
<tr>
<td>Department</td>
<td>Indicates the department of the employees.</td>
</tr>
<tr>
<td>Examination Start Date</td>
<td>Indicates the date the exam was started.</td>
</tr>
<tr>
<td>Examination Completion Date</td>
<td>Indicates the date the exam was completed.</td>
</tr>
<tr>
<td>Examination Expiration Date</td>
<td>Indicates the date the exam expires.</td>
</tr>
<tr>
<td>Number of Attempts</td>
<td>Indicates the number of attempts to pass the course.</td>
</tr>
</tbody>
</table>

**Pick N Bundle Report**

This report lists the courses selected from purchased course packages.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pick N Bundle Product Title</td>
<td>Indicates the Pick N Bundle title.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Media Format</td>
<td>Indicates the media format.</td>
</tr>
<tr>
<td>Marketing Course Description</td>
<td>Indicates the course description.</td>
</tr>
<tr>
<td>NASBA Field of Study</td>
<td>Indicates the field(s) of study the applied to the course.</td>
</tr>
<tr>
<td>CPE Credits</td>
<td>Indicates the number of credits the course qualifies for.</td>
</tr>
<tr>
<td>Bundle Expiration Date</td>
<td>Indicates the date the bundle expires.</td>
</tr>
</tbody>
</table>

**Shopping Cart Purchase History**

This report lists the courses purchased by employees.

<table>
<thead>
<tr>
<th>Available Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course ID</td>
<td>Indicates the data entered in the Course Code field within the course profile.</td>
</tr>
<tr>
<td>Course Title</td>
<td>Indicates the title of the learning activity.</td>
</tr>
<tr>
<td>Course Purchased Date</td>
<td>Indicates the date the course was purchased.</td>
</tr>
<tr>
<td>Course Status</td>
<td>Indicates whether the course is started or completed.</td>
</tr>
<tr>
<td>Employee Name</td>
<td>Indicates the employee’s name.</td>
</tr>
<tr>
<td>Number of Courses</td>
<td>Indicates the number of courses.</td>
</tr>
<tr>
<td>Available Column</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Purchased Mode</td>
<td>Indicates how the course was purchased.</td>
</tr>
<tr>
<td>Price</td>
<td>Indicates the price of the course.</td>
</tr>
</tbody>
</table>
Use Learning Plan Reports

Checkpoint Learning provides the option to view learning plan reports that show the employees’ status of completion of the courses they have been assigned. Each report can be exported to MS Excel by clicking the Export to Excel button in the upper right corner of the report.

See the View Learning Plan Reports topic for detailed information.
Create Customized Reports

Checkpoint Learning enables Firms to generate copies of the data within the Firm account. The data is available in the form of an MS Access database. Administrators can determine the set of data pulled in the database filtering by date and regulators.

To create customized reports do the following:

1. Click Settings.
2. Click Data Export from the Settings Menu located on the left side panel.
3. In the Activity Filter section, filter data by date and/or by the regulators mentioned.

**Note:** Checkpoint Learning recommends filtering by date and selecting all regulators when generating a database. If an individual regulator is not selected, all regulators will be chosen automatically.

4. Click the Generate Database button.
   
   The Administrator will receive an email from the system when the database is ready.
5. Once the email is received, navigate to Settings and select Data Export on the left side panel.
6. In the Data Export section, the export file link is displayed. The link is date and time stamped according to when the database was generated.
7. Click the link and choose Save As.
8. Select a location to save the file.
9. Click the Save button.
10. Navigate to the saved file.
11. Right-click the file. Select Extract All.
12. Browse the location for the extracted data and click the Extract button.
13. Click the database to open the extracted data.

**Note:** To access Commonly Used Reports (SQL Queries), click [here].
Support

New to Checkpoint Learning?
Below you will find user guides and recorded training for each of the products within Checkpoint Learning. Should you require live training, please send an email to checkpointlearning.productsupport@thomsonreuters.com requesting a live training session. Live training sessions are conducted via webinar. No CPE is awarded for these trainings.

Where can I find documentation?
Every web page on Checkpoint Learning has a left bar that contains one or more of the following: an explanation of the page’s features, tips and tricks for using the page’s features, and a glossary of terms used on that page.
## Checkpoint Learning Administrator Resources

**Administrator Resources**

Every web page on Checkpoint Learning has a left bar that contains one or more of the following: an explanation of the page's features, tips and tricks for using the page's features, and a glossary of terms used on that page.

<table>
<thead>
<tr>
<th>Resources</th>
<th>Training</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Tracking</strong></td>
<td>Training</td>
<td>This guide covers the basic steps from setting up a professional's account and status reports to entering professional designation information and CE history.</td>
</tr>
<tr>
<td><strong>University</strong></td>
<td>Training</td>
<td>The University user guide covers the essentials of creating and managing your in-house programs on the Checkpoint Learning platform. How to print sign-in sheets and send electronic evaluations and certificates are just a few topics found in the guide.</td>
</tr>
<tr>
<td><strong>Learning Plans</strong></td>
<td>Training</td>
<td>This guide covers how to set up learning plans, assign and track progress of course completions for programs assigned to the learning plans.</td>
</tr>
<tr>
<td><strong>Subscription Packages</strong></td>
<td>Training</td>
<td>This guide covers the steps you need to know to get your professionals set up and completing programs assigned to them through the subscription packages.</td>
</tr>
<tr>
<td><strong>Settings</strong></td>
<td>N/A</td>
<td>This user guide covers the details of setting up compliance reminder emails, customizing your account with firm messages, creating and editing additional Firm Administrator accounts and many ways to maximize the benefits of Checkpoint Learning.</td>
</tr>
<tr>
<td><strong>Support</strong></td>
<td>N/A</td>
<td>Click here to be directed to the Thomson Reuters Customer Portal; the storage center for all Thomson Reuters Tax &amp; Accounting Products.</td>
</tr>
<tr>
<td><strong>Firm Resource</strong></td>
<td>N/A</td>
<td>Checkpoint Learning Data Import table. Use this table to provide to CPL Support and import into your Checkpoint Learning account (*standard professional service fees may apply). Send your import request to <a href="mailto:checkpointlearning.productsupport@thomsonreuters.com">checkpointlearning.productsupport@thomsonreuters.com</a></td>
</tr>
<tr>
<td><strong>Firm Resource</strong></td>
<td>N/A</td>
<td>CPE Credit Documentation Form. Use this form for staff (that does not have write-access) to provide to the Firm Administrator with a copy of external certificates for entry into their Checkpoint Learning account.</td>
</tr>
<tr>
<td><strong>Firm Resource</strong></td>
<td>N/A</td>
<td>This form is for groups of two or more individuals. The group must appoint a moderator who will answer polling questions/attendance prompts on behalf of all those in attendance and submit those responses through the on-line webinar application. The moderator will attest to the group’s attendance by completing the Moderator Information section below. Please note the webinar title and date where indicated below, and list the first and last name, and email address of each individual requesting CPE credit.</td>
</tr>
</tbody>
</table>
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.

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.
# Contact Us

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.

<table>
<thead>
<tr>
<th>Support Group</th>
<th>Phone Number and Email Address</th>
<th>Issues/Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Support</td>
<td>1.800.431.9025 (follow option prompts)</td>
<td>Answer calls and emails relating to:</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:checkpointlearning.techsupport@thomsonreuters.com">checkpointlearning.techsupport@thomsonreuters.com</a></td>
<td>• Browser-based</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Certificate discrepancies</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Downloading/Accessing courses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Migration questions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Feed issues</td>
</tr>
<tr>
<td>Product Support</td>
<td>1.800.431.9025 (follow option prompts)</td>
<td>Answer calls and emails relating to:</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:checkpointlearning.productsupport@thomsonreuters.com">checkpointlearning.productsupport@thomsonreuters.com</a></td>
<td>• Functionality (how to use, where to find)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Content questions</td>
</tr>
<tr>
<td>Customer Support</td>
<td>1.800.431.9025 (follow option prompts)</td>
<td>Answer calls and emails relating to:</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:checkpointlearning.cpecustomerservice@thomsonreuters.com">checkpointlearning.cpecustomerservice@thomsonreuters.com</a></td>
<td>• Billing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Existing orders</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Cancellations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Webinars</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Certificates</td>
</tr>
</tbody>
</table>
Product Training for Firm Administrators

Below are links to product training sessions that will help you gain a better understanding of Checkpoint Learning:

Administrator Training for Subscription Packages Certificate and Network Products

Tracking CPE for the Firm

eLearning Mini Lesson - How to Create Email Policies

eLearning Mini Lesson - How to Delete an Employee

eLearning Mini Lesson - How to Print Status Report Questionnaires

eLearning Mini Lesson - How to Remove a Regulator from an Employee Account

Managing In-House Training with Checkpoint Learning’s University

Creating and Managing Learning Plans

Reporting

eLearning Mini Lesson - How to Create a Customized Report

eLearning Mini Lesson - How to Generate Reports
New Courses

Click here to see all new courses. Click on the "See all New Courses" near top of the left navigation pane Quick Links box on the CPL website, which opens a dynamic list of courses with new tags.

Click here to see all new online courses.

Click here to see all new webinars.
Use the Search Courses tab to Search for Courses

The Search Courses tab is the search engine for locating Thomson Reuters courses to assign to an employee. The Search Courses tab 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 Search Courses tab by clicking Search Courses tab.

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

To use the Search Courses tab to search for courses, do the following:

1. Click Search Courses tab.

   The Search Courses tab'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 Search Courses Tab**

<table>
<thead>
<tr>
<th>Element</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keywords</td>
<td>Search for CPE solutions by entering a keyword in the search field.</td>
</tr>
<tr>
<td>Element</td>
<td>Function</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Course Catalog</td>
<td>Perform advanced search, view all new courses, search by topic, search by delivery format, search by brand, and search by location.</td>
</tr>
<tr>
<td>About Our Products</td>
<td>Access overviews of new products, self-directed learning, instructor-led learning, and group solutions.</td>
</tr>
<tr>
<td>Learning Management</td>
<td>Access overviews of learning management products, CPE tracking and compliance, and professional development.</td>
</tr>
<tr>
<td>Tailored Solutions</td>
<td>Search for tailored solutions for corporate and industry, government, firms, individuals, registered tax preparers, and certified financial professionals.</td>
</tr>
<tr>
<td>Follow Us On</td>
<td>Access CPE &amp; Training blog, Checkpoint Learning Facebook Page, CPE &amp; Training Facebook page, Checkpoint Learning Twitter Feed, CPE &amp; Training Twitter Feed, and CPE &amp; Training on YouTube.</td>
</tr>
</tbody>
</table>
Use the Search Courses tab to Search for Courses

The Search Courses Tab is the search engine for locating Thomson Reuters courses to assign to an employee. The Search Courses Tab 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 Search Courses Tab by clicking **Search Courses Tab**.

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

To use the Search Courses Tab to search for courses, do the following:

1. Click **Search Courses Tab**.
   
The Search Courses Tab’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 Search Courses Tab

<table>
<thead>
<tr>
<th>Element</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keywords</td>
<td>Search for CPE solutions by entering a keyword in the search field.</td>
</tr>
<tr>
<td>Element</td>
<td>Function</td>
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<tr>
<td>------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Course Catalog</strong></td>
<td>Perform advanced search, view all new courses, search by topic, search by delivery format, search by brand, and search by location.</td>
</tr>
<tr>
<td><strong>About Our Products</strong></td>
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</tr>
<tr>
<td><strong>Tailored Solutions</strong></td>
<td>Search for tailored solutions for corporate and industry, government, firms, individuals, registered tax preparers, and certified financial professionals.</td>
</tr>
<tr>
<td><strong>CPE Products by Brand</strong></td>
<td>Access specific product brands, including AuditWatch, Checkpoint Learning, Gear Up, MicroMash, PASS Online, PPC, PPC and AuditWatch Conferences, Quickfinder, Reqwired, RIA, and Webinar Learning Network.</td>
</tr>
<tr>
<td><strong>Follow Us On</strong></td>
<td>Access CPE &amp; Training blog, Checkpoint Learning Facebook Page, CPE &amp; Training Facebook page, Checkpoint Learning Twitter Feed, CPE &amp; Training Twitter Feed, and CPE &amp; Training on YouTube.</td>
</tr>
</tbody>
</table>
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 Search Courses Tab.

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 Search Courses Tab page.

Note: On the Search Courses Tab 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, Search Courses Tab 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 Search Courses Tab. Search for specific courses by topic, term, or format. You can also sort the available list of courses on the Search Courses Tab 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.
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](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 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.
Obtain a Certificate for Attending a Webinar

Thomson Reuters Webinar certificates are emailed to attendees within two weeks of the program date.
Register for Courses that Qualify for Discount

Search for seminars and conferences using **Search Courses Tab**. 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 **Search Courses Tab**.
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 is 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.
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.
# Retired Courses

This lists courses that have been retired from Checkpoint Learning since the last quarter.

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Credits</th>
<th>Date</th>
<th>Replacement</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLRETX</td>
<td>Real Estate Taxation for Owners and Operators: Major Topics</td>
<td></td>
<td></td>
<td>Replaced by CLRET1 to 5</td>
</tr>
<tr>
<td>CLADPI</td>
<td>Introduction to Audits of Inventory</td>
<td>2</td>
<td>42400</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLCRMG</td>
<td>Credit and Collections Management</td>
<td>4</td>
<td>42400</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLTIPA</td>
<td>Introduction to the Tax Increase Prevention Act of 2014</td>
<td>4</td>
<td>42400</td>
<td>No replacement</td>
</tr>
<tr>
<td>CPGFOA</td>
<td>OPEB-GFOA Best Practices and the GASB’s Project Plan</td>
<td>1</td>
<td>42400</td>
<td>No replacement</td>
</tr>
<tr>
<td>EXVA15</td>
<td>2015 Ethics for Virginia CPAs</td>
<td>4</td>
<td>42400</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLQMFA</td>
<td>Ethics for Certified Financial Planners</td>
<td>4</td>
<td>42400</td>
<td>No replacement</td>
</tr>
<tr>
<td>BRESOR</td>
<td>Ethics Standards for Oregon CPAs</td>
<td>4</td>
<td>42400</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLFTXP</td>
<td>Tax Planning for Young Families</td>
<td>4</td>
<td>42428</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLCFSG</td>
<td>SAS 99: Consideration of Fraud in a Financial Statement Audit (GT)</td>
<td>5</td>
<td>42460</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLTEGT</td>
<td>Travel, Entertainment, Gift, and Transportation Expenses</td>
<td>4</td>
<td>42460</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLESTA</td>
<td>Estate Planning II: The Large Estate</td>
<td>9</td>
<td>42460</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLLIFIA</td>
<td>LIFO Inventory Method</td>
<td>6</td>
<td>42460</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLSECV</td>
<td>SEC Reporting Updates</td>
<td>2</td>
<td>42460</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLSOCM</td>
<td>Social Media: Marketing Your Business</td>
<td>2</td>
<td>42521</td>
<td>No replacement</td>
</tr>
<tr>
<td>CLAM2A</td>
<td>Other Topics for the Equity Method and Consolidations and Joint Ventures</td>
<td>4</td>
<td>42521</td>
<td>No replacement</td>
</tr>
<tr>
<td>Course Code</td>
<td>Course Title</td>
<td>42521</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------</td>
<td>------------------------------------------------------------</td>
<td>-------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CLSFA4</td>
<td>Impairment or Disposal of Long-Lived Assets (ASC 360-10)</td>
<td>No replacement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CLDIVO</td>
<td>Tax Issues for Divorced Individuals and Blended Families</td>
<td>No replacement</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Direct an Employee to Purchase Subscription Packages

To direct an employee to purchase a Subscription package, provide the following:

1. Click **Search Courses Tab**.
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 any credit card details to the Checkpoint Learning account, you will be prompted to do so. Click **Cancel** to cancel the transaction or **OK**.

6. Click the **Continue** button.
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.
9. Click the **Complete Checkout** button.
Direct an Employee to Access Purchased Courses

Purchased content can be accessed multiple ways for the employees depending on the content that was purchased.

To direct an employee to access purchased courses, provide one or both of the following:

**Library Bundle and Individual Course/Exam Users**

Purchased On-Demand courses and exams appear in the Thomson Reuters On-Demand Learning (Courses Available) section on the Learning page and Homeroom page. Purchased live events (webinars, webcasts, seminars and conferences) appear on the Live Learning calendar on the Homeroom page.

**Subscription Package Users**

When Premier, Professional or Compliance packages are purchased, Search Courses Tab is displayed in the respective account. Search Courses Tab lists all the training courses 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 Search Courses Tab. Search for specific courses by topic, term, or format.

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.
Direct an Employee to Purchase On-Demand Courses

To direct an employee to purchase on-demand courses, provide the following:

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

Use the **Search Courses Tab** to select the course to be purchased.

**To purchase a course from the Search Courses Tab do the following:**

1. Click **Search Courses Tab**.
2. Enter search criteria in the Advanced Search fields and select the appropriate options.
3. Click the **Search** button.
4. Click the **Buy Now** button next to the course to be purchased.
   
   **Note:** If a shipping address has not already been entered for the particular Checkpoint Learning account, a prompt is displayed to complete the shipping address form. Complete the form and click **Continue**.

5. On the **Shopping Cart** page, review the order and click the **Continue** button.
6. 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.
7. Click the **Continue** button.
8. Click the **Complete Checkout** button.
9. **Launch** the purchased course, when ready.
Direct an Employee to Download Checkpoint Learning Courses

To direct an employee to download Checkpoint Learning Courses, provide the following:

Courses in the download format allow the administrator 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 the 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 do the following:

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

   **Note:** If a subscription package has been purchased, courses appear instead on Search Courses Tab.

2. Locate the course to be downloaded and select the Download option beneath the course title.

   On selecting the Download option, the Launch button changes to a Download button.

3. Click the Download button.

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

   **Note:** If the correct version of Checkpoint Learning Offline Player has not already been installed, a prompt is displayed to click the "Click here" link to download and install the Offline Player.

5. Click the Download button to install the course.

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.

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. A topic can also be selected directly from the Outline menu.

12. Click the Exit link at the bottom of the page to close the course.
Direct an Employee to Download the Checkpoint Learning Offline Player

To direct an employee to download the Checkpoint Learning Offline Player, provide the following:

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 Checkpoint Learning and select a 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 is displayed.

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 to download and install Offline Player 3.5.

3. In the dialog box, click Run and the setup will start to download.

4. Click Run in the dialog box 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.
Direct an Employee to Access Downloaded Courses

After a course has been downloaded, access the course anytime through the Checkpoint Learning Offline Player.

To access Checkpoint Learning courses previously downloaded, do the following:

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

   The Login page appears.

2. Enter the Checkpoint Learning user name.

3. Click the Login button.

4. Click the Launch icon next to the desired course.
Direct an Employee to Launch On-Demand Courses

To direct an employee to access content, provide the following:

On-Demand courses can be launched at anytime from any place that has Internet access. Launch courses from Homeroom or Learning.

**Note:** If a subscription package has been purchased, courses appear instead on Search Courses Tab.

**Note:** Before starting this procedure, make sure the pop-up blocker is disabled.

To launch an On-Demand course do the following:

1. Click Homeroom or Learning.
2. In the Thomson Reuters On Demand Learning (Courses Available) section, click the title of the course to be opened.
3. Click the Launch button from the Launch E-Learning section on the left side panel.
   
   The selected course opens in a new window.
   
   Start, stop, and scroll back through the On-Demand courses as needed.

**Note:** Once launched, an On-Demand course is displayed in the In-Progress section on the Homeroom page.
Direct an Employee to Hide and UnHide an Expired or Incomplete Course

To direct an employee to hide any expired or incomplete courses, provide the following:

1. Click Homeroom.

2. In the In Progress section, click the In Progress link.
   
   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 viewing all the courses in the In Progress section, the course that has been hidden will not be displayed.

To direct an employee to unhide any expired or incomplete courses, provide the following:

1. Click Homeroom.

2. In the In Progress section, click the In Progress link.

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 to unhide and click UnHide Course.
Direct an Employee to Purchase Webcasts and Webinars

Checkpoint Learning's Search Courses Tab allows the purchase of courses in the Webinar and Webcast format.

**Note:** After the employee has purchased the webcast or webinar, they can navigate on the live learning calendar to the appointment and program details.

To direct an employee to purchase webinars and webcasts, provide the following:

1. Click **Search Courses Tab**.
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 the provided search criteria.
4. Select the check box for the webinar/webcast desired for purchase.
5. Click the **Buy Now** button at the bottom of the page.

**Note:** If a shipping address has not already been entered for the particular Checkpoint Learning account, a prompt is displayed to complete the shipping address form. Complete the form and click **Continue**.

6. Review the order and click the **Continue** button.
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.
- DIRECT AN EMPLOYEE TO PURCHASE WEBCASTS AND WEBINARS -

- 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.

9. Click the Complete Checkout button.
Direct an Employee to Register for Webinars in the Premier Package

To direct an employee to register for webinars, provide the following:

**Note:** Webinars are included for Premier package owners only. Other package owners can purchase webinar events from Search Courses Tab.

If a Premier package has been purchased, all of the subscription programs are displayed in Search Courses Tab. Search Search Courses Tab for specific courses by topic, term, or format. In the Premier package, registrations can be made for the one-to-four hour webinars only. To receive CPE credit for an event, registration for the webinar is a must.

To register for a purchased webinar, select the webinar and click the Register button. For those who wish to attend a webinar as a group, please be sure that all attendees are registered for the event and be sure to 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 within 24-48 business hours of the event time.

Last minute registrations are accepted. If a registration is being made within two hours of the event, please contact 1.800.231.1860 to ensure receipt of login information.

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

In case of failure to attend an event for which registration has been made, simply press the Unregister button for the event.

If you have questions, please call us at 1.800.231.1860 or email at thomsonreuterswebinars@thomsonreuters.com.
Obtain a Webinar/Webcast Certificate for an Employee

Thomson Reuters Webinar certificates are emailed to attendees within two weeks of the program date. Should your employee not receive the certificate, do any or all of the following:

- Contact Support at 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.
- e-mail [checkpointlearning.productsupport@Thomsonreuters.com](mailto:checkpointlearning.productsupport@Thomsonreuters.com) and provide the following:
  - Employee's first and last name
  - Employee's e-mail address
  - Title of Webinar/Webcast
  - Date of Webinar/Webcast
Direct an Employee to Purchase Online Grading Exams

To direct an employee to purchase Online Grading Exams, provide the following:

Checkpoint Learning’s Search Courses Tab allows the purchase of courses in the self-study, print-based course exams format.

**To purchase Online Grading exams, do the following:**

1. Click **Online Grading**.
2. Click **Purchase Exam** in the left side bar (or click the **Buy Exam** button on the right).
3. Scroll down the list to find the desired exam, or enter search criteria to the desired course:
   - **Exam Code** – Enter the exam code of the desired Online Grading course to be taken.
   - **Title** – Enter the title of the desired Online Grading course to be taken.
4. Click **Search**.
   
   The search result displays the exam or exams that match the provided search criteria.
5. Select the check box next to the exam to be purchased.
6. Click the **Buy Now** button at the bottom of the page.

**Note**: If a shipping address has not already been entered for the particular Checkpoint Learning account, a prompt is displayed to complete the shipping address form. Complete the form and click **Continue**.

7. Review the order and click the **Continue** button.
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.
10. Click the Complete Checkout button.

Once ready, take the exam that has just been purchased.
Direct an Employee to Take Online Grading Exams

To direct an employee to take an online grading exam, provide the following:

To take an exam from Online Grading, do the following:

1. Click Online Grading.
2. In the Exams Purchased section, click the desired exam title.

To take an exam from Homeroom, do the following:

1. Click Homeroom.
2. In the Thomson Reuters On Demand Learning (Courses Available) section, either click the Launch Exam link or click the exam title for the desired exam.

**Note:** If a subscription package has been purchased, the purchased exams appear instead on Search Courses Tab.

Once launched, the exam appears in the In-Progress section on the Homeroom page.
Direct an Employee to Purchase Seminars and Conferences

Checkpoint Learning’s Search Courses Tab allows the purchase of courses in the Seminar and Conference format.

To direct an employee to purchase seminars and conferences, provide the following:

1. Click **Search Courses Tab**.
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 the provided search criteria.
4. Select the check box for the seminar and/or conference desired to be purchased.
5. Click the **Buy Now** button at the bottom of the page.

   **Note:** If a shipping address has not already been entered for the particular Checkpoint Learning account, a prompt is displayed to complete the shipping address form. Complete the form and click **Continue**.

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

9. Click the **Complete Checkout** button.
Direct an Employee to View an Attendance Ticket for a Seminar/Conference

To direct an employee to view an attendance ticket for a Seminar or a Conference, provide the following:

1. Go to Homeroom scroll down to the Live Learning calendar and navigate to the appropriate month and year on the calendar. The title of the seminar or conference registered for will be displayed on the scheduled date.

2. Click the Seminar or Conference title.

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 along to the Seminar or Conference.
Direct an Employee to Register for Courses that Qualify for Discount

To direct an employee to register for Courses that Qualify for Discount, provide the following:

Search for seminars and conferences using Search Courses Tab. 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 Search Courses Tab.
2. Under the Brand section, select the Gear Up, AuditWatch, PPC, and AuditWatch Conferences check boxes.
3. Under the Media Format section, select the Seminar and Conferences check boxes.
4. Click the Search button.
5. Click the Show All link to show the list of program dates and options.

**Note:** Gear Up Society Sponsored Seminars and Gear Up Workshops are not eligible for the Live Event Discount. They will appear on the list for the search criteria selected, but they do not qualify for the discount.

To register for AuditWatch seminars do the following:

To register for AuditWatch Seminars, call 1.800.231.1860.

**Note:** To apply a discount to AuditWatch Seminars, be sure to mention the ownership of a Subscription Package over the call (to the number above).

To register for Gear Up seminars and conferences, and the PPC and AuditWatch conference do the following:

1. Search for the desired seminar or conference.
2. Select the checkbox next to the seminar or conference.
3. 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.

4. Click the Continue button to confirm the course order.
5. 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 is
direct an employee to register for courses that qualify for discount

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.

6. Click the **Continue** button.

7. Click the **Complete Checkout** button.
Direct an Employee to Register for an In-House Live Event

To direct an employee to register for an in-house Live Event, provide the following:

1. Click Homeroom.

2. On the Live Learning calendar at the bottom of the page, click the Live Event (Seminar/Conference) title.

3. Click the Register button from the Registration section on the left side panel. An email is sent from Checkpoint Learning to confirm the registration.

**Note:** The Unregister button appears on the Course Activity Profile page after the Register button has been clicked. If no Register button is available, the registration is closed. Contact the Firm Administrator for more information or details to register.

4. From the registered email account, open the registration confirmation email to view the registration details.

**Note:** The registration confirmation email contains an attachment. Open and save the appointment to your calendar.

Once registration has been completed for a course activity, the course activity appears in the respective account.
**Direct an Employee to Register for Suggested Replacement Courses**

To stay abreast of the latest topics, Checkpoint Learning is continually updating content to bring 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, a notification is dispatched containing details of replacement courses which can be taken instead of the retired course.

When purchasing a bundle, a notification is sent with details of any applicable retired course in the bundle in the Open Order and the bundle purchase can be made without the retired course. Replacement suggestions will be offered for the retired course which allow the purchase of one of the recommended courses.

In the On Demand section of the Homeroom, on selecting a purchased event or course which has been retired, a notification of deactivation of the course and suggested replacements will be displayed. Select the link of a suggested replacement to view the Course Description via the Shopping Cart order.
Direct an Employee to Purchase a DVD/CD

To direct an employee to access content, provide the following:

Checkpoint Learning’s Search Courses Tab allows a user to purchase courses in the DVD/CD format.

To purchase DVD/CDs, do the following:

1. Click **Search Courses Tab**.
2. Enter search criteria according to:
   - Keywords
   - Credits
   - Topic
   - Delivery Format
   - Media Format
   - Specialized Designations
3. Click **Search**.
   The search result displays the DVD/CDs that match the provided search criteria.
4. Select the check box next to the DVD/CD desired for purchase.
5. Click the **Buy Now** button at the bottom of the page.

**Note:** If a shipping address has not already been entered for the particular Checkpoint Learning account, a prompt is displayed to complete the shipping address form. Complete the form and click **Continue**.

6. Review the order and click the **Continue** button.
   The **Billing & Shipping** page is displayed.
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.

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

When the payment is processed the DVD will be mailed to the Shipping Address provided. On receiving the DVD/CD, visit the course details page.
Direct an Employee to Access a DVD/CD

To direct an employee to access a DVD/CD, provide 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).

   **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.

6. Select Activate and the course will launch.

   **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 Search Courses Tab. If you have any questions, please call 1-800-431-9025
User Bulletin

To see a complete list of the latest changes to Checkpoint Learning, access the most recent User Bulletin on the Customer Help Center.

If you have any questions, please contact checkpointlearning.productsupport@thomsonreuters.com or visit the News & Updates section in the Checkpoint Learning support site.
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