PROPRIETARY MATERIALS

No use of these proprietary materials is permitted without the express written consent of or license from Thomson Reuters. Altering, copying, distributing or reproducing any of these proprietary materials in any manner is expressly prohibited.

DISCLAIMERS

The scenarios, examples, and content within this document are used strictly for instructional purposes only. Thomson Reuters shall not be responsible for any liability directly or indirectly resulting from any outcomes or conclusions drawn from individual research discussed during the class.

In response to IRS Circular 230 requirements, Thomson Reuters advises that any discussions of federal tax issues in its publications and products or in third-party publications and products on its platforms are not intended to be used and may not be used to avoid any penalties under the Internal Revenue Code, or to promote, market, or recommend any transaction or subject addressed therein.

SOFTWARE LICENSE AGREEMENT

The right to use the software product described in this workbook is specifically conditioned upon your execution of and compliance with a Tax Software and Services Agreement with Thomson Reuters.

All contents are copyright 2018, Thomson Reuters.

All rights reserved.
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table of Contents</td>
<td>3</td>
</tr>
<tr>
<td>Welcome to Checkpoint Learning for Firm Professionals</td>
<td>7</td>
</tr>
<tr>
<td>Checkpoint Learning - The Big Picture</td>
<td>8</td>
</tr>
<tr>
<td>Log In to Checkpoint Learning</td>
<td>9</td>
</tr>
<tr>
<td>If You Have Forgotten Your User Name or Password</td>
<td>9</td>
</tr>
<tr>
<td>Navigate Checkpoint Learning</td>
<td>10</td>
</tr>
<tr>
<td>Navigate the Live Learning Calendar</td>
<td>13</td>
</tr>
<tr>
<td>Search for Live Learning Classes</td>
<td>14</td>
</tr>
<tr>
<td>Homeroom</td>
<td>15</td>
</tr>
<tr>
<td>News &amp; Updates</td>
<td>16</td>
</tr>
<tr>
<td>Search Courses Tab</td>
<td>17</td>
</tr>
<tr>
<td>On-Demand</td>
<td>19</td>
</tr>
<tr>
<td>Online Grading</td>
<td>20</td>
</tr>
<tr>
<td>Locate Online Grading Exam Guidebook</td>
<td>20</td>
</tr>
<tr>
<td>Access the Exam Certificate</td>
<td>21</td>
</tr>
<tr>
<td>If You Need Assistance</td>
<td>21</td>
</tr>
<tr>
<td>Learning Plan</td>
<td>22</td>
</tr>
<tr>
<td>Using the Competency Model</td>
<td>23</td>
</tr>
<tr>
<td>Read/Write Access</td>
<td>26</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>27</td>
</tr>
<tr>
<td>Checkpoint</td>
<td>28</td>
</tr>
<tr>
<td>Log In to Checkpoint from Checkpoint Learning</td>
<td>29</td>
</tr>
<tr>
<td>If You Have Forgotten Your Checkpoint User Name or Password</td>
<td>29</td>
</tr>
<tr>
<td>Change My Checkpoint Learning Password</td>
<td>31</td>
</tr>
<tr>
<td>Recover My Checkpoint Learning User Name or Password</td>
<td>32</td>
</tr>
<tr>
<td>Edit My Settings</td>
<td>33</td>
</tr>
<tr>
<td>Add a Professional Designation</td>
<td>34</td>
</tr>
<tr>
<td>Add Regulators</td>
<td>36</td>
</tr>
<tr>
<td>View My Status Reports</td>
<td>37</td>
</tr>
</tbody>
</table>

- 3 -
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigating the Status Report</td>
<td>37</td>
</tr>
<tr>
<td>Add an Activity to My Account</td>
<td>38</td>
</tr>
<tr>
<td>Add an Attachment to My Account</td>
<td>40</td>
</tr>
<tr>
<td>Attach a Document to an Activity</td>
<td>41</td>
</tr>
<tr>
<td>Print Attachments and Certificates</td>
<td>42</td>
</tr>
<tr>
<td>Register for In-House Classes</td>
<td>43</td>
</tr>
<tr>
<td>Request an Alternative Class Date/Time</td>
<td>45</td>
</tr>
<tr>
<td>Remove Myself from Registration</td>
<td>46</td>
</tr>
<tr>
<td>Remove Myself from Faculty Registration</td>
<td>47</td>
</tr>
<tr>
<td>Learning Plan</td>
<td>48</td>
</tr>
<tr>
<td>View My Learning Plan</td>
<td>49</td>
</tr>
<tr>
<td>Register for Courses on My Learning Plan</td>
<td>50</td>
</tr>
<tr>
<td>Request Additional Date/Time Options for Courses Assigned to My Learning Plan</td>
<td>51</td>
</tr>
<tr>
<td>Launch Thomson Reuters Courses on My Learning Plan</td>
<td>52</td>
</tr>
<tr>
<td>Link your Checkpoint and Checkpoint Learning Accounts</td>
<td>53</td>
</tr>
<tr>
<td>Use the Search Courses Tab to Search for Courses</td>
<td>54</td>
</tr>
<tr>
<td>Navigating the Search Courses Tab</td>
<td>54</td>
</tr>
<tr>
<td>Purchase a DVD/CD</td>
<td>56</td>
</tr>
<tr>
<td>Access a DVD/CD</td>
<td>58</td>
</tr>
<tr>
<td>Purchase On-Demand Courses</td>
<td>59</td>
</tr>
<tr>
<td>Find My On-Demand Courses</td>
<td>61</td>
</tr>
<tr>
<td>Homeroom</td>
<td>61</td>
</tr>
<tr>
<td>Learning</td>
<td>61</td>
</tr>
<tr>
<td>Find Purchased On-Demand Courses</td>
<td>63</td>
</tr>
<tr>
<td>Premier, Professional, and Compliance Package Users</td>
<td>63</td>
</tr>
<tr>
<td>Access Purchased Courses</td>
<td>64</td>
</tr>
<tr>
<td>Premier, Professional, and Compliance Package Users</td>
<td>64</td>
</tr>
<tr>
<td>Launch On-Demand Courses</td>
<td>65</td>
</tr>
<tr>
<td>Hide and UnHide an Expired or Incomplete Course</td>
<td>66</td>
</tr>
<tr>
<td>Download Checkpoint Learning Courses</td>
<td>67</td>
</tr>
</tbody>
</table>
# Table of Contents

Download the Offline Player ........................................................................................................... 69
Launch the Checkpoint Learning Offline Player ................................................................. 70
Access Downloaded Courses ................................................................................................... 71
Navigate Through a Thomson Reuters On-demand Course ........................................... 72
View On-Demand Course Results ....................................................................................... 73
Purchase Online Grading Exams ............................................................................................ 74
Take Online Grading Exams ..................................................................................................... 76
View Online Grading Exam Results ....................................................................................... 77
Purchase Seminars and Conferences ....................................................................................... 78
View Seminars and Conferences Registrations ................................................................. 80
View an Attendance Ticket for a Seminar/Conference .................................................. 81
Check Webinar System Requirement .................................................................................... 82
   WebEx System Requirements ......................................................................................... 82
   Mac OS X 10.5 or 10.6 ..................................................................................................... 82
Purchase Webcasts and Webinars ........................................................................................ 83
View Webinar and Webcast Registrations ......................................................................... 85
Obtain a Certificate for Attending a Webinar ....................................................................... 86
Purchase Subscription Packages .......................................................................................... 87
Access Subscription Package Content .................................................................................. 88
For Premier Package Owners: Register for Webinars ..................................................... 89
Register for Courses that Qualify for Discount .................................................................. 90
Register for Suggested Replacement Courses .................................................................. 91
Access Content from a Library .............................................................................................. 92
Assessment Results ............................................................................................................... 93
Checkpoint Learning Competency Model ............................................................................. 94
   Structure and Definitions ............................................................................................... 94
   Competencies ................................................................................................................. 95
   Functionality .................................................................................................................. 96
Getting Started with the Competency Model Self Assessment ............................................ 97
Self-Assessment ..................................................................................................................... 97
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency Assessment Reports</td>
<td>99</td>
</tr>
<tr>
<td>Select Manager/Coach to Provide Feedback</td>
<td>100</td>
</tr>
<tr>
<td>Result Options</td>
<td>100</td>
</tr>
<tr>
<td>Result Options</td>
<td>101</td>
</tr>
<tr>
<td>Certificate Programs</td>
<td>102</td>
</tr>
<tr>
<td>Network Programs</td>
<td>103</td>
</tr>
<tr>
<td>Userguide &amp; Checklist</td>
<td>104</td>
</tr>
<tr>
<td>Customer Help Portal</td>
<td>105</td>
</tr>
<tr>
<td>Perform a Search</td>
<td>105</td>
</tr>
<tr>
<td>Create a Case</td>
<td>106</td>
</tr>
<tr>
<td>Support for Firm Professionals</td>
<td>107</td>
</tr>
<tr>
<td>Product Training for Firm Professionals</td>
<td>108</td>
</tr>
<tr>
<td>New Courses</td>
<td>109</td>
</tr>
<tr>
<td>Index</td>
<td>110</td>
</tr>
</tbody>
</table>
Welcome to Checkpoint Learning for Firm Professionals

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

Your firm has chosen Checkpoint Learning as your solution for Continued Professional Education (CPE) needs and Continued Education (CE) Tracking. Each firm account has a minimum of one designated Firm Administrator.

Checkpoint Learning enables Firm Professionals to:

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

Be sure to contact your Firm Administrator when you need to:

- Acquire a forgotten user name or password.
- Obtain read/write access for your account.

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 us at checkpointlearning.cpecustomerservice@thomsonreuters.com to locate the account or provide another email address.
Checkpoint Learning - The Big Picture

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

- **Step 1 - Add Professional Designations (CTEC, CFP, RTRP)**
- **Step 2 - Add CE Tracking**
- **Step 3 - Access Content**
  - Online/Download Courses
  - Webinars
  - Seminars and conferences
  - Online Grading Exams
  - In-house Events
- **Step 4 - Adding History/Attachments**
- **Step 5 - Using the Learning Plans**
- **Step 6 - Using the Competency Module (Competency)**
  - Run Assessments
  - View Assessment Results
  - Solicit Manager Feedback
Log In to Checkpoint Learning

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

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

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

2. Locate the Checkpoint Learning Login section on the right side of the screen.

3. Complete the following fields:
   - **User Name** – Enter your Checkpoint Learning user name.
   - **Password** – Enter your Checkpoint Learning password.

   **Note:** Leave the Organization ID field blank. This field is for Firm Administrators only.

4. Click the Go button.
   Checkpoint Learning opens with your Homeroom page as the default.

If You Have Forgotten Your User Name or Password

If you have forgotten your Checkpoint Learning user name or password, contact your organization's Checkpoint Learning Firm Administrator.

Call 1.800.431.9025 for assistance in locating your Firm Administrator.
Navigate Checkpoint Learning

When you log into Checkpoint Learning, the Homeroom page 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. You can select these options to access features and functions of Checkpoint Learning.
- When you select an option, content is displayed in the Display Panel.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Homeroom</td>
<td>View news, class information, and press releases. Search for live and online training solutions. View current registrations, online programs in-progress, on-demand courses, and the schedule of instructor-led events.</td>
</tr>
<tr>
<td>Search Courses</td>
<td>View the training courses you have if you purchased a subscription package.</td>
</tr>
<tr>
<td>Status Reports</td>
<td>View regulators that have been added to your account and add regulators.</td>
</tr>
<tr>
<td>Activity History</td>
<td>Perform functions related to course activities, certificates, and documents.</td>
</tr>
<tr>
<td>Learning</td>
<td>View and launch on-demand and online grading courses. View your firm's</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Competencies</td>
<td>Access the Competency Model evaluation tool that defines the skills you need to perform a specific financial or accounting role in a job, organization, or profession.</td>
</tr>
<tr>
<td>Resources</td>
<td>Access regulator information and rules, and access state and society web sites.</td>
</tr>
<tr>
<td>Search Courses Tab</td>
<td>Search for Thomson Reuters courses by title, description, delivery format, media format, and vendor.</td>
</tr>
<tr>
<td>Online Grading</td>
<td>Take paper-based, self-study exams online and get real-time testing results.</td>
</tr>
<tr>
<td>Applications</td>
<td>Access links to associated applications, such as Checkpoint, Thomson Reuters online resource for audit and accounting and tax research.</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>Purchase courses through your Checkpoint Learning account, view your order summary, and print or maintain an electronic log of your purchases.</td>
</tr>
<tr>
<td>My Profile</td>
<td>View your personal information. Access your account setting preferences and industries and the organizations to which your account is linked.</td>
</tr>
<tr>
<td>Sign Off</td>
<td>Exit Checkpoint Learning.</td>
</tr>
</tbody>
</table>

The following symbols and icons identify the actions you can perform.

<table>
<thead>
<tr>
<th>Symbol/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong></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>![Icon]</td>
<td>View a helpful popup description about the purpose of the field and what information should be entered.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Edit the associated information.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Edit the associated information.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Delete the associated information.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Assign a learning path for an employee.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Add associated information.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Email associated information.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Email associated information.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Enable/disable associated information.</td>
</tr>
<tr>
<td>Symbol/Icon</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td><img src="image" alt="arrow_left_arrow_right" /></td>
<td>Scroll backward and forward through associated information.</td>
</tr>
<tr>
<td><img src="image" alt="folder" /></td>
<td>Preview the associated information or document.</td>
</tr>
<tr>
<td><img src="image" alt="trash_can" /></td>
<td>Remove/unregister an associated activity.</td>
</tr>
<tr>
<td><img src="image" alt="paperclip" /></td>
<td>Print associated information.</td>
</tr>
<tr>
<td><img src="image" alt="copy" /></td>
<td>Duplicate a course.</td>
</tr>
<tr>
<td><img src="image" alt="add" /></td>
<td>Add a course or course activity instance.</td>
</tr>
<tr>
<td><img src="image" alt="calendar" /></td>
<td>Open a calendar from which you can select a date.</td>
</tr>
</tbody>
</table>
Navigate the Live Learning Calendar

The Live Learning calendar displays your firm’s learning events. You will find this calendar on Homeroom and Learning.

Note: If your firm does not have the University module, the Live Learning calendar is blank.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Displays the Month</td>
<td>Scroll through previous months.</td>
</tr>
<tr>
<td>Change Calendar</td>
<td>Scroll through future months.</td>
</tr>
<tr>
<td>View to List View</td>
<td>Select a course sponsor. The selected sponsor’s courses are displayed in the Live Learning calendar.</td>
</tr>
<tr>
<td>Sponsor drop-down list</td>
<td>Filter events on the Live Learning calendar by a selected sponsor.</td>
</tr>
<tr>
<td>Single or Multi-Day Event</td>
<td>View a symbol that represents the course format type (example: microphone represents Live Seminar).</td>
</tr>
<tr>
<td>Course Time</td>
<td>View the course start time (example: 8:00 AM).</td>
</tr>
<tr>
<td>Course Location</td>
<td>View the city or room of the course based on the Firm settings (example: Washington).</td>
</tr>
<tr>
<td>Course Title</td>
<td>View the course title (example: QA Seminar). Click the course title to obtain more information or to register or remove yourself from registration.</td>
</tr>
<tr>
<td>Single or Multi-Day Event</td>
<td>View whether the course takes place on a single day or over multiple days.</td>
</tr>
</tbody>
</table>
Search for Live Learning Classes

To search for classes in the Live Learning calendar, use the right and left scroll arrows to navigate month-to-month.

To search for alternative dates or times for a class, see the Request Alternative Class Date/Time topic.
The Homeroom is the default page when you log in to Checkpoint Learning. At any other time, you can click on Homeroom to go to your Homeroom page, where you will find the following features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>News &amp; Updates</td>
<td>Contains the latest topics, CPE and Training solutions, subscriptions, upcoming webinars, new courses, and access to the Search Courses Tab search engine.</td>
</tr>
<tr>
<td>Search My Courses</td>
<td>Lets you perform a quick search for a course that matches your keywords. For a more detailed search, use the Search Courses Tab search engine.</td>
</tr>
<tr>
<td>CPE Status Reports</td>
<td>Contains the status reports for accounting regulators, compliance deadlines, and credits needed.</td>
</tr>
<tr>
<td>CLE Status Reports</td>
<td>Contains the status reports for legal regulators, compliance deadlines, and credits needed.</td>
</tr>
<tr>
<td>Training &amp; Solutions</td>
<td>Contains access to:</td>
</tr>
<tr>
<td></td>
<td>• Online learning courses from MicroMash, PASS Online, Webinar Learning Network, and Required.</td>
</tr>
<tr>
<td></td>
<td>• Live seminars and conferences from Gear Up, Gear Up Workshops (formerly Bell Learning), PPC Conferences, and AuditWatch.</td>
</tr>
<tr>
<td></td>
<td>• In-house training from Practitioners Monthly Video Digest and AuditWatch.</td>
</tr>
<tr>
<td></td>
<td>• Self-study courses from Gear Up, PPC, Quickfinder, and RIA.</td>
</tr>
<tr>
<td>Course Finder</td>
<td>Lets you access the Search Courses Tab. This button is available only when the Firm Administrator has authorized the display of the Ad Banner.</td>
</tr>
<tr>
<td>My Registrations</td>
<td>Contains the courses for which you have registered.</td>
</tr>
<tr>
<td>Instructor Commitments</td>
<td>Contains the events that you are scheduled to lead.</td>
</tr>
<tr>
<td>Learning Plan</td>
<td>Contains the courses included in your learning plan as assigned by your Firm Administrator.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Contains the courses that you have started taking but have not yet completed.</td>
</tr>
<tr>
<td>Thomson Reuters On Demand Learning (Courses Available)</td>
<td>Contains the courses and exams that you have purchased.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If you have purchased a subscription package, your courses appear instead on the Search Courses Tab.</td>
</tr>
<tr>
<td>Previewed Courses</td>
<td>Contains the courses that you have previewed.</td>
</tr>
<tr>
<td>Live Learning Calendar</td>
<td>Contains the month-by-month schedule of instructor-led events. This feature appears only if you have purchased the University module.</td>
</tr>
</tbody>
</table>
News & Updates

The News & Updates section on your Homeroom page displays the following features:

- **Hot Topics** – Read up on the latest discussions affecting the accounting industry, access information about Checkpoint Learning features, and access and online courses. Click the View All Hot Topics link to see a complete list of topics.

- **Upcoming Webinars** – View the schedule of upcoming webinars on the newest and hottest topics.

- **Class Information** – Access the Thomson Reuters Search Courses search engine to find the best, most popular, latest and greatest courses to meet your CPE needs. Also, view or print the latest Thomson Reuters CPE & Training Catalog.

- **Press Releases** – View the latest Thomson Reuters press releases regarding courses and training.
Search Courses Tab

Checkpoint Learning’s Search Courses Tab lets you enter search criteria to customize your search for Thomson Reuters courses by topic, delivery format, CPE product brand, media format, and location.

You can access the Search Courses Tab in either of the following ways:

- Click **Search Courses Tab**.
- Click the **Course Finder** button on the **Homeroom** page.

**Note:** The **Course Finder** button is available only when the Firm Administrator has authorized the display of the Ad Banner.

Once you access the Search Courses Tab, you can use the default Advanced Search or select another search option from the left side panel.

**To use another search option:**

The other search options you can select are:

- See All New Courses
- Search by Topic
- Search by Delivery Format
- Search by Location

**To use search results:**

After performing a custom search, from the search results, you can:

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

**Note:** For more information, see the **Use the Search Courses Tab to Search for Courses** topic.

**To use other resources from the left side panel:**

On **Search Courses Tab**, you can also access other resources from the left side panel:
- About Our Products – Access overviews of Checkpoint Learning products, including self-directed, instructor-led, and group solutions.

- Learning Management – Access overviews of learning management tools and features, including Reqwired, CPE tracking and compliance management, and professional development.

- Tailored Solutions – Access overviews of solutions for corporations, industries, firms, individuals, tax preparers, and certified financial professionals.

- CPE Products by Brand – Access products from other vendors, such as AuditWatch, Gear Up, MicroMash, PASS Online, PPC, Quickfinder, Reqwired, and RIA.

- Follow Us On – Access Checkpoint Learning’s social media resources, including CPE & Training Blog, CPL Facebook page, CPL Twitter feed, CPE & Training Twitter feed, and CPE & Training on YouTube.
On-Demand courses are interactive online self-study courses that can be taken anytime and anywhere you have access to your Checkpoint Learning account.

You can access a list of your purchased On-Demand courses from the Thomson Reuters On Demand Learning (Courses Available) section on Homeroom or Learning.

**Note:** If you have purchased a subscription package, your courses appear instead on the Search Courses Tab.

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

When you complete an On-Demand course, the electronic certificate appears in your list of attachments on Activity History. The credits automatically transfer to your regulators, updating your status reports immediately.
Online Grading provides access to self-study print-based course exams. There's no need to mail in your answers and wait for a response. You can complete these course examinations and receive real-time test results. After passing the exam, the activity will appear on your Checkpoint Learning Activity History and the certificate will appear in your list of certificates on the Course Completion Certificates and Learning Documents page.

Online Grading features include:

- **Around the Clock Grading** – Final exams can now be submitted for grading any time day or night and you get immediate results. Once you successfully complete the final exam your 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.

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

After passing the exam, the activity appears on Activity History.

**Locate Online Grading Exam Guidebook**

Use the following steps to locate and download the guidebook associated with an online grading exam.

**To locate the guidebook for an Online Grading exam:**

1. Click Search Courses Tab.
   
   The Advanced Search page appears.

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

3. Click the Search button.
   
   A list of exams with print-based guidebooks appears.

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

   The File Download window appears.

   **Note:** You can either open the document or save it.

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

   The Save As window opens.

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

7. Click the Save button.
Access the Exam Certificate

After passing an exam, you can access the course certificate from Activity History.

To access the course certificate:

1. Click Activity History.

   The Activity History page appears.

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

   The Course Completion Certificates and Learning Documents page appears.

If You Need Assistance

If you need assistance with Online Grading, please call Customer Support at 1.800.431.9025.
Learning Plan

The Learning Plan feature enables you to view courses assigned to you by your Firm Administrator. The Learning Plan specifies whether the course is a Thomson Reuters or firm-sponsored event, optional or mandatory, and specifies the deadline by which the course must be completed.

For questions about your Learning Plan or the courses assigned to you within your Learning Plan, contact your Checkpoint Learning Firm Administrator. For assistance in locating your Firm Administrator, contact 1.800.431.9025.

**Note:** You can access the Live Learning calendar from **Learning** or **Homeroom**.

**To locate courses assigned to you in a Learning Plan:**

1. Click **Learning**.

   The **Learning** page appears.

2. Scroll to the Live Learning calendar at the bottom of the page.

3. Scroll through the months to access the scheduled courses in your firm’s learning plan.

**Note:** To take a MicroMash or PASS Online course, access it from the **Thomson Reuters On Demand Learning (Courses Available)** section or search for the course using **Search My Courses** on the left side panel.
Using the Competency Model

The Competency Model is an evaluation tool that defines the skills you need to perform a specific financial or accounting role in a job, organization, or profession. This tool helps you set learning goals, explore performance management issues, and plan your career.

The Competency Model is organized around four career levels, five technical specialties, and thirteen non-technical categories—everything a professional needs to be proficient on the job.

**Note:** You must subscribe to the Competency Model to have it included in Checkpoint Learning. Contact your Firm Administrator to request subscription.

Using the Competency Model, you can:

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

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

To view competencies and mapped courses:

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

2. Select the check boxes next to the levels, areas of specialty, and categories that apply to your search.
   
   **Note:** You can customize your search to view the competencies for your current job or for a job you want in the future.

3. Select the **Show link to course maps** check box.
   
   **Note:** If you do not select the **Show link to course maps** check box, you will not see the mapped courses associated with the selected competencies.

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 mapped courses.

6. Click a course title to view course details or to register for the course.

7. Click a mapped course to view the course profile.

To take a self-assessment of your skills:
1. Click Competencies.

The Checkpoint Learning Competency Model page appears.

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

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

3. Click the Search button.

The model displays the competencies for the selected levels.

4. Click the expand icon next to a level to view all associated competencies.

5. Select the check boxes for the competencies you would like to make part of your self-assessment.

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

Your customized self-assessment appears in the display panel.

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

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

8. Click the Save and view results button.

The model displays your self-assessment results.

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

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

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

**To add on-the-job activities:**

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

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

**To invite your manager/coach to provide feedback:**

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

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

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

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

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

Read/write access is the ability for a professional to enter and update his or her own professional account. Read/write access enables the professional to perform the following functions:

- Add regulators
- Add activities
- Add attachments

**Note:** Read access only allows the professional to view records.

Contact your Firm Administrator regarding read/write access. All updates to CE records are handled by the Firm Administrator. The ability to register for classes and launch on-demand learning is not affected by read/write access.
Shopping Cart

To access the Shopping Cart, click the Shopping Cart link at the top of any Checkpoint Learning page. You can also access the Shopping Cart when you click the Buy Now button associated with a course you want to purchase.

The Shopping Cart lets you:

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

The Checkpoint research system offers you fast, effective ways to find answers to your research questions. Here are many of the activities you can do with Checkpoint:

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

For your convenience, you can launch your Checkpoint account from your Checkpoint Learning account.
Log In to Checkpoint from Checkpoint Learning

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

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

To establish single sign on link:

1. Click **Settings**.
   
   The **My Profile** page appears.

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

3. Locate the Checkpoint application and click the **Link** link in the **Status** column.
   
   Checkpoint Learning links to Checkpoint and the **Checkpoint Login** page appears.

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

To log in to Checkpoint from Checkpoint Learning:

1. Click **Applications**.
   
   The **Applications** page appears.

2. Click the **Checkpoint** link on the left side panel.
   
   The **Checkpoint Login** page appears in a new window.

3. Complete the following fields:
   
   - **User Name** – Enter your Checkpoint user name.
   - **Password** – Enter your Checkpoint password.

4. Click the **Login** button.
   
   The Checkpoint application opens.

If You Have Forgotten Your Checkpoint User Name or Password

If you have forgotten your Checkpoint user name or password, perform the following procedures.

To request your Checkpoint password:

1. On the **Checkpoint Login** page, locate the "Did you forget your User Name or Password?" question.

   **Note:** The words "User Name" and "Password" in the question are links you can click.
2. Click the **Password** link.
   The **Get Password** window appears.

3. Complete the following fields:
   - **Username** – Enter your Checkpoint user name.
   - **Email** – Enter your email address.

4. Click the **Send** button.
   You will receive an email with a temporary password.

**To request your Checkpoint username:**

1. On the **Checkpoint Login** page, locate the “Did you forget your User Name or Password?” question.
   
   **Note:** The words "User Name" and "Password" in the question are links you can click.

2. Click the **User Name** link.
   The **Get User Name** window appears.

3. Enter your email address in the **Email** field.

4. Click the **Send** button.
   You will receive an email with a temporary password.
Change My Checkpoint Learning Password

Checkpoint Learning enables you to change your password. Passwords must be a minimum of six characters and are not case sensitive.

To change your Checkpoint Learning password:

1. Click **Settings**.
   - The **My Profile** page appears.
2. Click **Change Password** from the **Account Profile** section on the left side panel.
   - The **Change Password** page appears.
3. Complete the following fields:
   - **Current Password** – Enter your current password.
   - **New Password** – Enter the password you want to use.
   - **Confirm Password** – Re-enter the password you want to use.
4. Click the **Submit** button.
Recover My Checkpoint Learning User Name or Password

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

To request your password:

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.
Edit My Settings

You can edit your personal profile information in Checkpoint Learning.

To edit your settings:

1. Click Settings.
   
The My Profile page appears.

2. Click Edit Preferences from the Personal Profile Settings menu on the left side panel.
   
The Update User Profile page appears.

3. Enter any or all of the following information:
   
   - **Update User Profile** – Enter your name, company name, department, and customer number.
   
   - **Address** – Enter your address and time zone information.
   
   - **Email** – Enter your email type, email address information.

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

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

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

5. Click the Save button.
Add a Professional Designation

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

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

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

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

Note: The following task can only be completed if you have been assigned rights to edit your account.

To add a professional designation:

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

Note:
1. If you are an IRS Registered Tax Return Preparer (RTRP) or an Enrolled Agent (EA), enter the PTIN. The PTIN must be a capital “P” followed by eight (8) numbers. Do not enter a PTIN designation if you are an attorney, certified public, accountant, or certain other individual who does not prepare Form 1040 series returns.
2. If you are a Certified Financial Planner (CFP), enter the CFP ID. The CFP ID is the certificant / CFP Board ID number issued with the professional’s initial certification from CFP.
3. If you are a California Registered Tax Preparer (CRTP), enter the CTEC ID number. The CTEC ID number is a 4- to 6-digit number that may or may not be preceded by an “A”.

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

A regulator is a tool that tracks license or certificate requirements. You can add regulators to track CE requirements for various jurisdictions. Prior to adding regulators to an account, you must have read/write access to your account. Contact your Firm Administrator if you require read/write access, or request the Firm Administrator to add the regulator for you.

To add regulators:

1. Click **Status Reports**.
   
   The **Status Report Manager** page appears.

2. Click **Manage Regulators** from the **Status Reports Menu** on the left side panel.
   
   The **Manager Regulators** page appears.

3. From the **Regulator** drop-down list, select the regulator.

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

5. Answer the questions prompted in the Status Report Questionnaire.

6. Click the **Submit** button after you answer each question.
   
   The selected regulator's **Status Report** page appears.
View My Status Reports

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

To view my status report:

1. Click Status Reports.
   
The Status Report Manager page appears.

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

   The Status Report page appears.

Navigating the Status Report

![Status Report Diagram]

- Credits Earned: Summary of the credits earned, the CPE requirement and deficits.
- Status: Summary: 01/01/2008 - 12/31/2010
- PCAOB: Industry: Accountancy
- Effective Date: 02/04/2005

- Activity Information: Displays the date, title, sponsor, format, type, sponsor number, and credits.
- Compliance Period: Rule Summary: Launches regulator details and requirements.
- Credits Earned: 437.0, 216.0, 351.0, 156.0, 48.0, 36.0, 38.0, 24.0
- CPE Requirement: 120.0, 0.0, 0.0, 0.0, 0.0, 0.0, 0.0, 0.0
- Credit Deficit: 0.0, 0.0, 0.0, 0.0, 0.0, 0.0, 0.0, 0.0

- FY2010: 01/01/2010 - 12/31/2010
- Rule Highlights: Professional Proficiency Credit:
  - The Revised Government Auditing Standards (June 2003) state that CPE earned towards the CPE requirement must 'directly enhance the auditor's professional proficiency to perform audits and/or attestation engagements.' [Formerly, any CPE which contributed to 'the auditor's professional proficiency' would qualify for credit.]
- Credit Caps:
  - No more than 20.0 credits can be earned through publication of books or articles. [Remaining: 20.0]
  - No more than 40.0 credits can be earned through teaching CPE courses. [Remaining: 40.0]
Add an Activity to My Account

You can add activities and their respective credits to your account.

**Note:** To add activities to your account, you must have read/write access. Contact your Firm Administrator if you do not have read/write access. Your Firm may have a policy regarding adding activities to your account. Check with your Firm Administrator for details.

To add activities to your account:

1. Click **Activity History**.
   
   The **Activity History** page appears.

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

3. Complete the following fields in the **Activity Details** section:
   - **Title** – Enter the title of the class.
   - **Sponsor** – Select the class sponsor from the drop-down list.
   - **Format** – Select the format type from the drop-down list.
   - **Completion Date** – Enter the completion date (format MM/DD/YYYY) or click the Calendar icon to select the date.

4. Enter optional notes or additional information in the **Notes** 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 and hold the Ctrl key to select more than one regulator. Click the single arrow icon to move individual regulators. Click the double arrow icon to move all regulators.

6. Select the **Assist me with credit distribution** check box if you want Checkpoint Learning to determine which category credits will be displayed. Then, click the **Next** button.
   
   - If you **did not** select the **Assist me with credit distribution** check box, skip directly to step 8.
   - If you selected the **Assist me with credit distribution** check box, the **Credit Distribution Assistant** page appears. Continue to step 7.
7. Complete the following fields on the **Credit Distribution Assistant** page:
   - Enter the participation time in minutes for the appropriate Field of Study category.
     
     **Note:** Most accountancy regulators base 1 credit on the 50-minute hour.
   - Select **Yes** or **No** that the activity is sponsored by NASBA and meets NASBA Registry Standards of accreditation.
   - Enter the NASBA Registry or QAS # if applicable.
     
     **Note:** If the course provider has a state specific sponsor number, enter the sponsor number in step 10.
   - 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 (such as city, state).

8. Click **Next**.

   The **Add Activity** 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 category/credit amount on the **Add Activities** page.

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

   **Note:** If the course provider has a state specific sponsor number (such as FL, NY, HI, PA, TN, PCAOB) or instructor’s name, locate the regulator and enter the sponsor number in the corresponding regulators’ **Sponsor #** field or locate or the instructor’s name in the **Instructor Name** field.

10. Click **Submit**.

    The **Activity Profile** page appears.
Add an Attachment to My Account

You can add documents (such as certificates of completion or copies of licenses) to your Checkpoint Learning account.

**Note:** You must have read/write access to add attachments to your account. Contact your Firm Administrator if you do not have read/write access. Your Firm may have a policy regarding adding attachments to your account. Check with your Firm Administrator for details.

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

**To add a document to your account:**

1. Click **Activity History**.
   
   The **Activity History** page appears.

2. Click **Certificates & Document** from the **Activity History Menu** section on the left side panel.
   
   The **Course Completion Certificates & Learning Documents** page appears.

3. Click **Add Document** from the **Activity History Menu** section on the left side panel.
   
   The **Add Document** page appears.

4. Complete the **Document Name** field (example: Audit 101 July 7 2009).

5. Click the **Browse** button.
   
   The **Choose File to Upload** dialog box appears.

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

7. Click the **Open** button.
   
   The selected file appears in the **File** field on the **Add Document** page.

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

**Note:** You can click the 📝 icon to edit the document name or the 🗑️ icon to delete the document.
Attach a Document to an Activity

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

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

To attach a document to an activity:

1. Click Activity History.
   The Activity History page appears.
2. Click Activity Profile from the Activity History Menu on the left side panel.
   The Activity Profile page appears.
3. Click Attach Documents on the left side panel.
   The Attach Documents page appears.
4. Select the check box of the document name you want to attach.
5. Click the Submit button.
   The attached document is displayed at the bottom of the Activity Profile page.
Print Attachments and Certificates

Electronically issued certificates and attachments are stored in Activity History of your account.

To print attachments:

1. Click Activity History.
   
   The Activity History page appears.

2. Click Certificates & Documents from the Activity History Menu on the left side panel.
   
   The Course Completion Certificates & Learning Documents page appears.

3. Click the title of the document from the Learning Documents section.
   
   The selected document opens in the application in which it was created (such as MS Word).

4. Select the print feature of the application. (For example, for an MS Word document, click the Print icon in the tool bar or select File > Print.)

To print in-house issued certificates:

1. Click Activity History.
   
   The Activity History page appears.

2. Click Certificates & Documents from the Activity History Menu on the left side panel.
   
   The Course Completion Certificates & Learning Documents page appears.

3. Do one of the following:
   
   - In the Course Activity column, click the title of the certificate you want to print. The selected certificate appears.
   - Select the check box to print one or more certificate from the left hand side.

4. Click the Print Certificate button.
Register for In-House Classes

In-house classes, or course activities, are posted to the Live Learning calendar by your Firm’s Administrator.

**Note:** If your Firm does not have the University module, this feature does not apply to you.

Course activities are authorized by your Firm Administrator to display on the Live Learning calendar. Click any course activity title from the Live Learning calendar to view more details about the respective course activity.

**Note:** You can access the Live Learning calendar from Learning or Homeroom.

To register for in-house classes:

1. Click Homeroom.
   
   The Homeroom page appears.

2. On the Live Learning calendar at the bottom of the page, click the course title.
   
   The Course Activity Profile page appears.

3. Click the Register button from the Registration section on the left side panel.
   
   An email is sent from Checkpoint Learning to confirm your registration.

   **Note:** The Unregister button appears on the Course Activity Profile page after you click the Register button. If no Register button is available, the registration is closed. Contact your Firm Administrator for more information or details to register.

4. From your email account, open your registration confirmation email to view the registration details.

   **Note:** The registration confirmation email contains an attachment. Open and save the appointment to your calendar.

After you register for a course activity, the course activity appears in your account.

To view your registrations, wait list, and instructor commitments:

1. Click Learning.
   
   The Learning page appears.

2. Click Registrations/Wait list/Instructor Commitments from the Schedule Learning Menu on the left side panel.
   
   The Registrations/Wait list/Instructor Commitments page appears with the following sections:

   - **Registrations** – A list of your future registrations is displayed in this section.
   - **Wait list** – A list of course activities for which you are wait listed is displayed in this section.
• Instructor Commitments – A list of course activities for which you are a faculty member is displayed in this section.
Request an Alternative Class Date/Time

You can request alternative dates or times for in-house sponsored course activities through your Checkpoint Learning account.

**Note:** If your Firm does not have the University module, this feature does not apply to you.

You can access the Live Learning calendar from Homeroom or Learning.

To request an alternative in-house class date or time:

1. Click **Homeroom**.
   
   The **Homeroom** page appears.

2. Navigate to the **Live Learning** calendar located at the bottom of the page.

3. Click the appropriate course title.
   
   The **Course Activity Profile** page appears.

4. Click the parent course title link in the **Course Activity Details** section.
   
   The **Course Profile** page for the parent course appears.

5. Do either of the following actions:
   
   - **Title** – Click the course title for the date and time you want. When the Course Profile page for the selected course appears, click the **Register** button in the left side panel.
   
   - **Request Other Options** – Click the link to open an email addressed to your Firm Administrator, then click the **Send** button in the email.
Remove Myself from Registration

The My Registrations section on your Homeroom page displays up to three of your upcoming registrations. If you are not registered for any future training, the My Registrations section is blank.

**Note:** If your Firm does not have the University module, this feature does not apply to you.

You can remove yourself from a course activity registration from the My Registrations section of your Homeroom by accessing the course activity on the Live Learning calendar. The My Registration section has the following features.

<table>
<thead>
<tr>
<th>Element</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registrations Link</td>
<td>Displays all future course activity registrations.</td>
</tr>
<tr>
<td>Start Date/Time</td>
<td>Displays the start date and time of the respective course activity.</td>
</tr>
<tr>
<td>Title</td>
<td>Displays the title of the course activity.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Displays the sponsor of the course activity.</td>
</tr>
<tr>
<td>Format</td>
<td>Displays the format type of the course activity (such as a Live Seminar).</td>
</tr>
<tr>
<td></td>
<td>Indicates that registration is closed. Contact your Firm Administrator to be removed from registration.</td>
</tr>
<tr>
<td></td>
<td>Enables you to remove yourself from a course activity registration.</td>
</tr>
</tbody>
</table>

To remove yourself from registration on the Homeroom page:

In the My Registrations section on the Homeroom page, click the Unregister icon for the associated course. An email confirming your removal from registration will be sent to you.

**Note:** To remove the activity from your calendar, open the Registration Confirmation email and the enclosed attachment. Click Remove from Calendar in the email attachment.

To remove yourself from registration from the Course Activity Profile:

1. On the Homeroom page, locate the course activity title on the Live Learning calendar.
2. Click the course activity title.
   
   The Course Activity Profile page appears.
3. Click the Unregister button from the left side panel.
   
   An email confirming your removal from registration will be sent to you.
4. To remove the activity from your calendar, open the registration confirmation email and the enclosed attachment. Click Remove from Calendar.
Remove Myself from Faculty Registration

To remove yourself from a faculty registration, send an email to your Firm Administrator requesting removal.
Learning Plan

A Learning Plan is a set of courses, either mandatory or optional, that have been assigned to you with a target date of completion. Contact your Firm Administrator for more information about the course(s) assigned in your learning plan. Click on the course titles to view more information and opportunities to complete the content assigned to you.
View My Learning Plan

To view your learning plan, do the following:

1. Click Homeroom.

   The Homeroom page appears.

2. In the Learning Plan section, click Learning Plan or click the More... link. The Learning Plan page appears.

   **Note:** By default, the Learning Plan page displays a list of incomplete items. To view the items that you have completed, click View Complete Items and to view the list of all items (complete and incomplete) on your learning plan, click View All Items.

   **Note:** When you view all the items on your learning plan, each item displays with the target date, current status and other applicable information.
Register for Courses on My Learning Plan

To register for in-house sponsored course activities on your learning plan:

1. Go to your learning plan. (See View My Learning Plan)
   The list of incomplete items on your learning plan is displayed by default. (If you do not see the list of incomplete items click View Incomplete Items)

2. Click the title of the desired course. The Course Profile page is displayed.

3. In the Course Activities section, click the course activity title corresponding to the date/time option you prefer.

   **Note:** You can also request additional date/time options for courses assigned to your learning plan.

4. Click the Register button in the left-hand navigation pane under the Registration section. A confirmation e-mail is sent to your registered e-mail address upon clicking the Register button. If you have registered for a live event or webinar, the confirmation e-mail will contain a respective calendar appointment or login details for the session.
Request Additional Date/Time Options for Courses Assigned to My Learning Plan

You have the ability to request additional date/time options to participate in an in-house course.

To request an additional date/time option, do the following:

1. In your Learning Plan, click the title of the desired course. The Course Profile page appears.

2. In the Course Activities section, on the right-hand side, click Request Other Options. An e-mail template opens in a new window.

3. You may add any information you deem necessary such as your name/signature and click Send.
Launch Thomson Reuters Courses on My Learning Plan

To launch a Thomson Reuters course from your learning plan:

1. Go to your learning plan. (See View My Learning Plan)

2. Locate the course of your choice and click the course title. The Course Profile page appears.

3. Scroll to the Course Activities section to see the available formats (online-download)

4. Click the course title corresponding to the format of your choice.

5. For the Download format, click the Download button in the left-hand navigation pane. Complete the download process and launch the course through the Checkpoint Learning Offline Player. Or,

6. For the online format, click the Launch button in the left hand navigation pane under the Launch E-Learning section.
Link your Checkpoint and Checkpoint Learning Accounts

Click here for the steps to link your Checkpoint Learning account to your Checkpoint research account.
Use the Search Courses Tab to Search for Courses

The Search Courses Tab is the search engine for locating Thomson Reuters courses. The Search Courses Tab lets you enter search criteria to customize your search for courses by topic, delivery format, CPE product brand, field of study, or location.

You can access the Search Courses Tab by clicking **Search Courses Tab** or the **Course Finder** button on the **Homeroom** page.

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

To use the Search Courses Tab to search for courses:

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 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 your search results.

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

4. On the left side panel, you can select other search options, 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>
</tbody>
</table>
### Use the Search Courses Tab to Search for Courses

<table>
<thead>
<tr>
<th>Element</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<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, Reqwired, 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 You Tube.</td>
</tr>
</tbody>
</table>
Purchase a DVD/CD

Checkpoint Learning’s Search Courses Tab feature provides access to courses in the DVD/CD format.

To purchase DVD/CDs:

1. Click Search Courses Tab.
   The Advanced Search page appears.
2. Enter search criteria according to:
   - Keywords
   - Credits
   - Topic
   - Delivery Format
   - Media Format
   - Specialized Designations
3. Click Search.
   The search result displays the exam or exams that match your search criteria.
4. Select the check box for the exam you want to purchase.
5. Click the Buy Now button at the bottom of the page.
   The Shopping Cart page appears.

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

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

8. Click the Continue button.
   The Order Summary page appears.
9. Click the Complete Checkout button.
   The Your Receipt page appears.

The DVD will be mailed to your Shipping Address once the payment is processed. Once you receive the DVD/CD, you can view the details of the course you purchased.
Access a DVD/CD

To access a DVD/CD, do the following:

1. Open the disk drive on your computer.

2. Place the DVD/CD labeled Vol1 into your computer's disk drive and close the disk drive.

3. The installation wizard should automatically launch with instructions for installing the offline player. If the installation wizard does not automatically launch, you must:
   - Locate and open the My Computer icon on your desktop.
   - Locate the drive location where the DVD/CD is inserted. This is normally the (D:) drive.
   - Open the contents of the drive containing the DVD/CD.
   - Double-click the file titled Startup.exe. This will launch the installation wizard.

4. When the installation wizard has completed the installation of the offline player, the course data will begin downloading automatically. You will be notified when all course data from the DVD/CD has been downloaded successfully.
   - If the course data spans multiple DVD/CDs, you will be instructed to remove the current DVD/CD from the disk drive and insert the next DVD/CD.
   - Course download will continue automatically after each additional DVD/CD is inserted.

5. Once you are notified that all course content has been successfully downloaded, select Launch Player. You will be prompted to close the current window you are viewing so the player can launch. Click OK. The player will launch and will provide you with the option to select the Launch icon to launch the course. After selecting the Launch icon, you will be asked to provide the following data:
   - The unlock code key (found on the DVD/CD label and the back of the DVD/CD sleeve).
   - Your first and last name as it appears on the DVD/CD label.

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

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
Purchase On-Demand Courses

This topic refers to purchasing all Thomson Reuters courses. Prices for the courses vary by topic and CPE credit.

To purchase a course from the Search Courses Tab:

1. Click Search Courses Tab.
   The Advanced Search page appears.
2. Enter your search criteria in the Advanced Search fields and select the appropriate options.
3. Click the Search button.
   The search results appear based on your search criteria.
4. Click the Buy Now button next to the course you want to purchase.
   If you are an existing customer, the Shopping Cart page appears.

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

5. On the Shopping Cart page, review your order and click the Continue button.
   The Billing & Shipping page appears.
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.
   The Order Summary page appears.
8. Click the **Complete Checkout** button.

    The **Your Receipt** page appears.

9. When you are ready, you can **launch** the purchased course.
Find My On-Demand Courses

You can access On-Demand courses from Homeroom and Learning.

**Note:** If you have purchased a subscription package, your courses appear instead on Search Courses Tab.

The following procedures assume you have not purchased a subscription package.

**Homeroom**

On the Homeroom page, On-Demand courses can be found in the Thomson Reuters On Demand Learning (Courses Available) section.

**Note:** If you have access to other sponsors, you will also find On-Demand courses in the sponsor's On Demand Learning (Courses Available) section.

To view purchased On-Demand courses from Homeroom:

1. Click Homeroom.
   
   The Homeroom page appears.

2. Click the Thomson Reuters On Demand Learning (Courses Available) title bar.
   
   The On Demand Learning (Courses Available) page appears.

3. From the list of On-Demand courses, you can:
   
   - Click the course name to view details about the course.
   - Click the headings in the title bar (Title, Sponsor, Format) to sort the courses in ascending and descending alphabetical order.
   - Launch the course.
   - Export the course list to MS Excel.

**Learning**

On the Learning page, On-Demand courses can be accessed from the Schedule Learning Menu on the left side bar or from the Thomson Reuters On Demand Learning (Courses Available) section.

To view purchased On-Demand courses from Learning:

1. Click Learning.
   
   The Learning page appears.

2. Click On-Demand Learning (Courses Available) from the Schedule Learning Menu on the left side panel.
   
   The On Demand Learning (Courses Available) page appears.
3. From this list of On-Demand courses, you can:

- Click the course name to view details about the course.
- Click the headings in the title bar (Title, Sponsor, Format) to sort the courses in ascending and descending alphabetical order.
- Launch the course.
- Export the course list to MS Excel.
Find Purchased On-Demand Courses

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

Note: If you purchase a subscription package, On-Demand courses appear on Search Courses Tab.

Premier, Professional, and Compliance Package Users

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

- **Online Self Study (Online Method)** – This format is an online course that you launch from Search Courses Tab. You must disable your pop-up blockers to enable the program to open in a new window and must stay connected to the Internet during the time you are taking the course. Once the course is open, you can navigate around and then complete the study questions at the end of each chapter and the exam at the end of the course. You can stop and exit the course and your account and then come back where you left off.

- **Online Self Study (Download Method)** – This is the same course as the Online Self Study (Online Method), but in this case, you only connect twice for the course, once to download the course off the Internet to your computer, and the second time after you finish the course. Then you need to connect to the Internet, log in to your Checkpoint Learning account and launch the course a final time so the account can obtain the results.

- **Print-Based with OG (Online Grading)** – The online exam can be found on the back of the Complimentary Guides located in the Search Courses Tab of your account. When you click the Search Courses Tab, in the Media Format section, select the Print Based with OG option, and then click the Search button. The list of complimentary PDFs appears. Click the PDF button to open the guide you want. At the back of each PDF is the exam. You can just read the content if you want. But if you want CPE for reading the content, you have to take the exam. The exam is included in the package, but can also be bought by other learners in the Search Courses Tab.

- **Webinars** – You must register for the date and time that works for you. The programs are on Search Courses Tab. Once you select the date and time and click the Register button, a dialog box opens with a message that says an email will be sent to you with the webinar details. The email can be sent up to 48 hours prior to the event. Any registrations done within the 48 hours prior to an event is considered last minute and registration should be confirmed by calling 1.800.431.9025.
Access Purchased Courses

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

On-Demand courses can be launched at anytime from anywhere you have Internet access. You can launch courses from Homeroom or Learning.

**Note:** If you have purchased a subscription package, your courses appear instead on Search Courses Tab.

**Note:** Before starting this procedure, make sure your pop-up blocker is disabled.

To launch an On-Demand course:

1. Click Homeroom or Learning.

2. In the Thomson Reuters On Demand Learning (Courses Available) section, click the course title you want to open.
   
   The Course Activity Profile page appears.

3. Click the Launch button from the Launch E-Learning section on the left side panel.
   
   The selected course opens in a new window.

   You can start, stop, and scroll back through On-Demand courses as needed.

**Note:** Once launched, an On-Demand course appears in the In-Progress section on your Homeroom page.
Hide and UnHide an Expired or Incomplete Course

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

1. Click Homeroom.
   
   The Homeroom page appears.

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

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

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

1. Click Homeroom.
   
   The Homeroom page appears.

2. In the In Progress section, click In Progress link. The In Progress page appears.
   
   At the end of the list of incomplete or expired courses in the In Progress page a Show Hidden Courses link is displayed.

3. Click Show Hidden Courses.
   
   The In Progress page displays a list of hidden courses.

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

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

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

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

To download Checkpoint Learning courses:

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

   **Note:** If you have purchased a subscription package, your courses appear instead on Search Courses Tab.

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

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

3. Click the Download button.

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

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

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

5. Click the Download button to install the course.

   The Checkpoint Learning Login page appears.

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

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

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

   The Available Courses page appears.

9. Click the Launch icon.

10. When the course opens, click the arrow on the left to expand the Outline menu.
11. Use the left and right arrows in the bottom right corner to navigate through the course. You can also select a topic directly from the Outline menu.

12. Click the Exit link at the bottom of the page when you are ready to close the course.
Download the Offline Player

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

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

To download the offline player, do the following:

1. Login to your **Checkpoint Learning** account and select your downloadable course. Click the **Download** button and the **Checkpoint Learning Offline Player** window opens up.

2. Click the **Click Here** link within the note. A dialog box opens up.

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

3. In the dialog box, click **Run** and the setup will start to download.

4. In the dialog box that opens up, click **Run** to confirm and the **Checkpoint Learning Offline Player - InstallShield Wizard** opens up.

5. Click the **Update** radial button and then select the **Next** button.

6. Click **Install** to begin the installation.

7. Once **Checkpoint Learning Offline Player** has been successfully installed, click **Finish** to exit the wizard.
Launch the Checkpoint Learning Offline Player

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

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

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

  OR

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

  OR

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

  OR

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

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

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

To access Checkpoint Learning courses previously downloaded:

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

   The Login page appears.

2. Enter your Checkpoint Learning user name.

3. Click the Login button.

   The Available Courses page appears.

4. Click the Launch icon next to the course you want to open.
Navigate Through a Thomson Reuters On-demand Course

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

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

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

Click the Exit link at the bottom of the page when you are ready to close the course.
**View On-Demand Course Results**

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

**To view your completed On-Demand activity:**

1. Click **Activity History**.
   
   The **Activity History** page appears.

2. In the **Title** column, click the On-Demand course activity title.
   
   The **Activity Profile** page appears with the course activity and accreditation details.

**To view your completed On-Demand certificates:**

1. Click **Activity History**.
   
   The **Activity History** page appears.

2. Click **Certificates & Documents** from the **Activity History Menu** on the left side panel.
   
   The **Course Completion Certificates and Learning Documents** page appears.

3. In the **Course Activity** column, click the course activity title.
   
   The **Certificate of Attendance** page for the activity appears.
Purchase Online Grading Exams

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

To purchase Online Grading exams:

1. Click Online Grading.
   
   The My Exams page appears.

2. Click Purchase Exam in the left side bar (or click the Buy Exam button on the right).
   
   The Purchase Exams page appears.

3. Scroll down the list to find the exam you want, or enter search criteria to find your course:
   
   - **Exam Code** – Enter the exam code of the desired Online Grading course you want to take.
   
   - **Title** – Enter the title of the desired Online Grading course you want to take.

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

5. Select the check box for the exam you want to purchase.

6. Click the **Buy Now** button at the bottom of the page.
   
   The Shopping Cart page appears.

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

7. Review your order and click the **Continue** button.
   
   The **Billing & Shipping** page appears.

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

9. Click the Continue button.
   The Order Summary page appears.
10. Click the Complete Checkout button.
    The Your Receipt page appears.

When you are ready, you can take the exam you just purchased.
Take Online Grading Exams

Once you purchase an online grading exam, you can go to Online Grading or Homeroom to take the exam.

To take an exam from the Online Grading:

1. Click Online Grading.

   The My Exams page appears.

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

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

To take an exam from Homeroom:

1. Click Homeroom.

   The Homeroom page appears.

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

   **Note:** If you have purchased a subscription package, your purchased exams appear instead on Search Courses Tab.

   Once launched, the exam appears in the In-Progress section on the Homeroom page.
View Online Grading Exam Results

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

To view your Online Grading exam results:

1. Click Activity History.
   
   The Activity History page appears.

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

   The Activity Profile page appears with activity and accreditation details.
Purchase Seminars and Conferences

The Checkpoint Learning Search Courses Tab feature enables purchases of seminars and conferences, live events sponsored by Thomson Reuters.

To purchase a Seminars and Conferences:

1. Click **Search Courses Tab**.

   The **Advanced Search** page appears.

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

3. Click **Search**.

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

4. Select the check box for the seminar/conference you want to purchase.

5. Click the **Buy Now** button at the bottom of the page.

   The **Shopping Cart** page appears.

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

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

   The **Billing & Shipping** page appears.

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

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

8. Click the **Continue** button.

    The **Order Summary** page appears.

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

    The **Your Receipt** page appears.

When you are ready, you can [view the details](#) of the event you purchased.
View Seminars and Conferences Registrations

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

See View Attendance Ticket.
View an Attendance Ticket for a Seminar/Conference

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

1. Go to Homeroom scroll down to the Live Learning calendar and navigate to the appropriate month and year on the calendar. You will see the title of the seminar or conference you have registered for displayed on the scheduled date.

2. Click the Seminar or Conference title and the Course Activity Profile page is displayed.

3. Click the View Attendance Ticket button on the upper-right corner of the Course Activity Details section or under the Attendance Ticket section in the left-hand navigation pane.

4. The attendance ticket is displayed in .pdf format. Print a copy of the ticket and carry it with you to the Seminar or Conference.
Check Webinar System Requirement

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

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

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

WebEx System Requirements


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

**Mac OS X 10.5 or 10.6**

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

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

The Checkpoint Learning Search Courses Tab feature enables purchases of webinars and webcasts, live events sponsored by Thomson Reuters.

To Purchase Webcasts and Webinars

1. Click **Search Courses Tab**.
   The Advanced **Search** page appears.

2. Enter search criteria according to:
   - **Keywords**
   - **Credits**
   - **Topic**
   - **Delivery Format**
   - **Media Format**
   - **Specialized Designations**

3. Click **Search**.
   The search result displays the webinars or webcasts that match your search criteria.

4. Select the check box for the webinar/webcast you want to purchase.

5. Click the **Buy Now** button at the bottom of the page.
   The **Shopping Cart** page appears.

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

6. Review your order and click the **Continue** button.
   The **Billing & Shipping** page appears.

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

• Address 1 – Type the billing address in the field.

• City – Type the billing city in the field.

• State – Select the billing state from the drop-down list.

• Zip Code – Type the billing zip code in the field.

8. Click the Continue button.
   The Order Summary page appears.

9. Click the Complete Checkout button.
   The Your Receipt page appears.

When you are ready, you can view the details of the event you purchased.
View Webinar and Webcast Registrations

Once you purchase a Webinar or a Webcast, go to Homeroom to view your registration details.

To view from Homeroom:

1. Click Homeroom.

   The Homeroom page appears.

2. In the Live Learning section, the Webinar/Webcast title will display within the Calendar on the date you have registered for. Click on the title to view details of your registration.

   The details of the Webinar or Webcast will also be mailed to you 24 hours prior to the Webinar/Webcast.

   You can click Add to Calendar option next to the corresponding Webinar Registration on Search Courses Tab to add it to your Outlook calendar.

Note: If you have purchased a subscription package, your courses appear instead on Search Courses Tab.
Obtain a Certificate for Attending a Webinar

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

The Checkpoint Learning Search Courses Tab feature enables purchases of subscription packages sponsored by Thomson Reuters.

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

1. Click the 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 a credit card to your Checkpoint Learning account, you will prompted to do so. Click Cancel to cancel the transaction or Ok

6. Click the Continue button.

The Billing & Shipping page appears.

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

8. Click the Continue button.

The Order Summary page appears.

9. Click the Complete Checkout button.

The Your Receipt page appears.
Access Subscription Package Content

Welcome to your Checkpoint Learning subscription. To access your content, click Search Courses Tab located at the top of your Checkpoint Learning account. Thomson Reuters offers programs in a variety of formats. See the related links below to view the steps for the format of interest.

- Download Courses
- Online Courses
- Print-based with Online Grading
- Seminars and Conferences
- Webinars and Webcasts
For Premier Package Owners: Register for Webinars

**Note:** Webinars are included for Premier package owners only. Other package owners can purchase webinar events from Search Courses Tab.

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

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

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

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

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

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

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

If you have questions, please call us at 1.800.231.1860 or email us at thomsonreuterswebinars@thomsonreuters.com.
Register for 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.
Register for Suggested Replacement Courses

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

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

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

In the On Demand section of your Homeroom, when you select a purchased event or course which has been retired, you will receive a notification of deactivation of the course and suggested replacements. Select the link of a suggested replacement to view the Course Description via your Shopping Cart order.
Welcome to your Checkpoint Learning library. To access your content, click the Thomson Reuters On-Demand Courses Available link from your Homeroom. Thomson Reuters offers programs in a variety of formats. See the related links below to view the steps for the format of interest.

- Download Courses
- Online Courses
Assessment Results

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

For optimum results, review the following items:

1. Use the results of the self-assessment as a baseline.
2. Establish a goal with action steps.
3. Progress through increasing levels of difficulty (start with awareness building).
5. Estimate time needed to achieve goal.
7. Check in at regular intervals to monitor progress.
Checkpoint Learning Competency Model

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

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

Structure and Definitions

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

**By Levels:**

- **Staff** – Individuals with this title usually have up to three years of work experience. They should have strong analytical, communication, and organizational skills. A staff accountant or auditor should have some proficiency with Microsoft Office applications and database applications. People in these positions usually possess or are working towards a CPA, CIA, or CMA accreditation. A bachelor's degree in accounting is usually required for this position.

- **Senior** – Seniors usually have at least three years of work experience and a bachelor’s degree in accounting. They should have robust communication, organizational, interpersonal, problem-solving, and project management skills. Seniors usually supervise accounting and auditing staff. They should possess superior technology skills, including proficiency with Microsoft Office applications and database applications. Seniors should possess or be working towards a CPA, CMA, or CIA credential. Some organizations prefer that these individuals have a master’s degree, such as a MBA.

- **Manager** – Managers have at least five years of work experience and have a bachelor's degree in accounting. They should have well-developed analytical, communication, interpersonal, leadership, and problem-solving abilities. Managers should have Microsoft Excel expertise. These individuals direct the work of accounting, audit, tax, or management service staff as well as oversee project teams. Managers conduct research, perform planning, and make recommendations to senior management. A CPA, CMA, or CIA designation is required. Organizations prefer that managers have advanced degrees, such as a MBA.

- **Director** – Directors generally have at least seven to eight years of work experience. Organizations expect a bachelor's degree in accounting at a minimum, but most organizations prefer a master's degree. These individuals oversee the accounting, audit, tax, or management service practice area and the related staff. Directors have excellent analytical, communication, leadership, negotiation, problem-solving, and strategic-planning skills. They research business issues and provide guidance to senior management and assist with business development. A CPA, CMA, or CIA designation is essential.

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

- **Corporate Accounting** – Demonstrating technical and subject matter expertise in the delivery of professional services; preparing and analyzing financial information to provide to external and internal users.
- External Audit – Demonstrating technical and subject matter expertise in the delivery of professional services; accumulating and verifying the data supporting the preparation of financial statements and internal controls of the financial reporting process.

- Internal Audit – Demonstrating technical and subject matter expertise in the delivery of professional services; performing independent reviews of the company’s financial and operating systems; assisting in the examination of financial statements.

- Tax – Demonstrating technical and subject matter expertise in the delivery of professional services; determining liability to various taxing authorities for income tax, licenses, sales tax, property tax and payroll tax.

- Financial Management – Demonstrating technical and subject matter expertise in the delivery of professional services; accumulating, analyzing, and reporting financial and non-financial data in a format and level of detail required by management for making business decisions.

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

- Client Service – Demonstrating a clear understanding of the clients’ needs and using the appropriate tools and techniques to deliver quality service

- Research – Accessing various information and literature to determine relevance and application

- Technology – Using basic technology as it specifically relates to your industry

- Communication – Applying effective verbal and written communication skills needed in reports, presentations and meetings

- Business Analysis & Interpretation – Reviewing and evaluating relevant business information

- Problem Solving & Decision Making – Demonstrating the principles and techniques needed to solve problems and render good judgment

- Risk Analysis – Identifying, evaluating and managing business risk

- Leadership – Taking charge by demonstrating strategic thinking, professionalism and systemic planning

- Management – Providing direction achieving project goals and service delivery

- Professional Development – Adopting and encouraging a culture of continual learning, knowledge sharing and goal setting for career development and promotion

- Legal & Regulatory – Knowing applicable regulations, codes and professional standards

- Ethics – Demonstrating an awareness and understanding of legal and ethical behavior

- Industry & Global Perspective – Knowing industry and global implications and requirements

Competencies

The competencies are written not only to describe the skills, knowledge, and attitudes needed to be proficient and successful, but provided in observable and measurable language to make it easier for you to apply to your job. Here are some sample competencies:
- Obtains and reviews current industry materials
- Reviews work to ensure quality and accuracy
- Meets client needs by quickly and effectively communicating client issues and concerns

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

**Functionality**

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

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

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

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

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

**Self-Assessment**

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

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

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

1. **Developing**
   - Explains basic concepts, principles, and practices while performing routine tasks with assistance

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

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

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

5. **Expert**
   - Contributes to the advancement of skill or knowledge in the field external to the organization
   - Develops new tools and demonstrates innovative thinking
   - Leads others and performs at a high expectation level
   - Leads the development of concepts and principles
   - Provides in-depth expertise on varied concepts and principles having comprehensive knowledge
Competency Assessment Reports

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

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

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

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

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

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

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

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

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

Result Options

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

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

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

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

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

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

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

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

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

Checkpoint Learning offers several Certificate Programs to help Accounting Professionals develop acumen in specific areas such as; Tax Research, Tax Fundamentals, Health Care Reform, and Forensic Accounting. New topics will be added each year.

Each Certificate Program offers multiple courses where CPE can be applied to state and other CPE requirements. CPE Certificates of completion are awarded upon successful completion of each CPE course or webinar. A Program Competency Certificate is issued upon successful completion of all program components.

Detailed information about each program is found at https://checkpointlearning.thomsonreuters.com/GetCertificate
Network Programs

Checkpoint Learning provides the materials and training needed to help Professionals acquire up-to-date information and best practices in leadership, strategic management and meet their CPE License requirements (up to 48 CPE hours). Video and/or Streaming videos allow for flexibility in delivering the content either as a group or individual setting. Supplemental materials, including group moderation forms, discussion problems and solutions, transcript and access to an online exam come with the one-year subscription for up to 25 participants.

To make a purchase call 800-231-1860.
Userguide & Checklist

Below is a list of links to the user guide and checklists that might be helpful to you.

Click [here](https://checkpointlearning.thomsonreuters.com/Mktg/GetCertificate/docs) to access the Certificate Program User Guide.

Also, see below a list of checklists for various certificate programs

<table>
<thead>
<tr>
<th>Certificate Program</th>
<th>Checklist</th>
</tr>
</thead>
</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.

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

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](https://customerhelp.thomsonreuters.com):

1. Click **Cases** on the upper left hand side of the screen, or, click **Create a Case** below **Contact Us** on the lower right hand side of the screen.

2. On the **Create a Case** screen, fill in personal details, firm details, inquiry details and case description, as required, in the fields provided.

3. Click **Submit** or, click **Submit & Add Attachment** and follow the given instructions in case an attachment needs to be submitted along with the case.
Support for Firm Professionals

For more information regarding administrative policies, please contact your Firm Administrator or Customer Support at 1.800.431.9025.

For all public product documentation, answers, and additional resources, go to the Customer Help Center here.

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

<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 Professionals

Below are links to product training sessions that will help you gain a better understanding of Checkpoint Learning:

eLearning Mini Lesson - Addressing Common Login Problems in Checkpoint Learning

eLearning Mini Lesson - Changing Your Checkpoint Learning Password and Username

CPE Tracking for the Licensed Professional

eLearning Mini Lesson - Viewing a Status Report

Professional Training for Subscription Packages

eLearning - How to Register

eLearning Mini Lesson - Navigating Within the Course Outline of a PASS Online or MicroMash Online Course

eLearning Mini Lesson - Printing a PDF-Format Course

eLearning Mini Lesson - Retrieving a Certificate

eLearning Mini Lesson - Searching for a Course
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.
Index

A

Access Downloaded Courses 71
Access Purchased On-Demand Courses 64
Ad Banner 17
Add Activity to My Account 38
Add Attachment to My Account 40
Add Document to Activity 41
Add Document to My Account 40
Add On-the-Job Activities 24
Add Regulators 36
Alternative Class/Time 45
Attach Document to Activity 41
Attachments 40, 42

C

Certificate 86
Certificates 42
Change CPL Password 31
Checkpoint Learning Offline Player 67, 71
Checkpoint Research 28
Class/Time 45
Competency Model 23
Course Catalog 17, 54, 59
Course Finder 17
CPE Status Reports 15
CPL Status Reports 15
Customer Support for Firm Professionals 107
<table>
<thead>
<tr>
<th>D</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Magazines &amp; Newsletters</td>
<td>9</td>
</tr>
<tr>
<td>Document</td>
<td>40-41</td>
</tr>
<tr>
<td>Download Courses</td>
<td>67, 71</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>E</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit My Settings</td>
<td>33</td>
</tr>
<tr>
<td>Establish Single Sign On</td>
<td>29</td>
</tr>
<tr>
<td>Exam Certificate</td>
<td>21</td>
</tr>
<tr>
<td>Exams</td>
<td>20, 74, 77</td>
</tr>
<tr>
<td>Excel</td>
<td>61</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>F</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>17</td>
</tr>
<tr>
<td>Feedback</td>
<td>24</td>
</tr>
<tr>
<td>Find My On-Demand Courses</td>
<td>61</td>
</tr>
<tr>
<td>Find Online Grading Exams</td>
<td>74</td>
</tr>
<tr>
<td>Find Purchased On-Demand Courses</td>
<td>63</td>
</tr>
<tr>
<td>Forgotten Checkpoint User Name/Password</td>
<td>29</td>
</tr>
<tr>
<td>Forgotten CPL User Name/Password</td>
<td>9, 32</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>G</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Guidebooks for Online Grading</td>
<td>20</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>H</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Homeroom</td>
<td>15</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>In-House Certificates</td>
<td>42</td>
</tr>
<tr>
<td>In-House Classes</td>
<td>43</td>
</tr>
<tr>
<td>In-Progress Courses</td>
<td>19</td>
</tr>
<tr>
<td>Instructor Commitments</td>
<td>43</td>
</tr>
</tbody>
</table>
Invite Manager/Coach for Feedback 24

Launch On-Demand Courses 65
Learning Plan 22
Live Learning Calendar 13, 22
Log In to Checkpoint From CPL 29
Log In to Checkpoint Learning 9

Main Menu Tabs 10
Manager/Coach Feedback 24
Mapped Courses 23
MS Excel 61
My CPE 67
My CPE Tab 63-64, 89

Navigate Checkpoint Learning 10
Navigate Live Learning Calendar 13
News & Updates 16

Obtain Certificate Webinar 86
Offline Player 67, 71
On-Demand Certificates 73
On-Demand Course Results 73
On-Demand Courses 19, 59, 61, 64-65
On-the-Job Activities 24
Online Grading 20
Online Grading Exams 74, 76-77
Password for CPL 31
PDF Guidebooks 20
Premier Package 89
Premier, Professional, Compliance Package 63-64
Print Attachments and Certificates 42
Print In-House Certificates 42
Purchase On-Demand Courses 59
Purchase Online Grading Exams 74
Purchased On-Demand Courses 63

Read/Write Access 26
Recover CPL User Name/Password 32
Register for Courses Qualifying for Discounts 90
Register for In-House Classes 43
Register for Webinars 89
Registrations/Wait List 43
Regulators 36
Request Alternative Class/Time 45

Search for Courses 54
Search for Live Learning Classes 14
Search for Seminars/Conferences 90
Self Assessment 23
Seminars/Conferences 90
Settings 33
Shopping Cart 27, 59, 74
Single Sign On 29
Social Media 17
Status Report 37
Status Report Questionnaire 36
Subscription Packages 63-64, 86, 89-90
Support for Firm Professionals 107
Symbols & Icons 11

Take Online Grading Exams 76
Take Self Assessment 23
Twitter 17

User Name/Password - Checkpoint 29
User Name/Password - CPL 9
User Name/Password CPL 32

View Competencies 23
View Mapped Courses 23
View On-Demand Certificates 73
View On-Demand Course Results 73
View On-Demand Courses 61
View Online Grading Exams 77
View Registrations/Wait List 43
View Status Report 37

Wait List 43
Webinar 86, 89
Welcome 7