CHECKPOINT LEARNING

SUBSCRIPTION PACKAGE USER GUIDE FOR FIRM ADMINISTRATORS

Welcome to Checkpoint Learning for Firm Administrators

Welcome to Checkpoint Learning – your one-stop shop for continuing education, compliance tracking, and program management!

As a Firm Administrator, you need to set up your professionals' access to the Checkpoint Learning subscription package.

Package CODE Name	COMW - Compliance	PROW Professional	CORW Corporate Advancement Package	PREW Premier	PLSW - Premier Plus
CE Tracking	✓	✓	✓	✓	✓
# of Courses	250 Courses (No Ethics)	310 Courses (Inc. Ethics)	110 + Courses (Corporate Topics)	340+ Courses	340+ Courses
Online Self-Study Courses	✓	✓	✓	✓	✓
Print-Based Courses and OLG				✓	✓
Live 24 Hours Discounted				✓	✓
Webinars 1-4 Hours			✓	✓	✓
Webinars 5-8 Hours					✓
Additional Live 16 Hours Discounted					✓
Competency Module					✓

This guide is designed to show you how to complete the following steps:

- How to login
- How to Create Professional Accounts

For support, go to http://support.checkpoint.thomsonreuters.com, or call 800.431.9025.

- How to Assign Professionals to Content Packages
- How to Utilize the Competency Module

Log In to Checkpoint Learning

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

- Learn about the different solutions and products Thomson Reuters has to offer. View demos on how these products are used by customers.
- Use the Course Catalog to search for courses by topic, delivery format and location.
- Access Checkpoint Learning social media platforms, including the CPE & Training blog, CPL Facebook page, CPL Twitter feed, CPT & Training Twitter feed, and CPE & Training on 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, do the following:

1. Go to **https://checkpointlearning.thomsonreuters.com**.

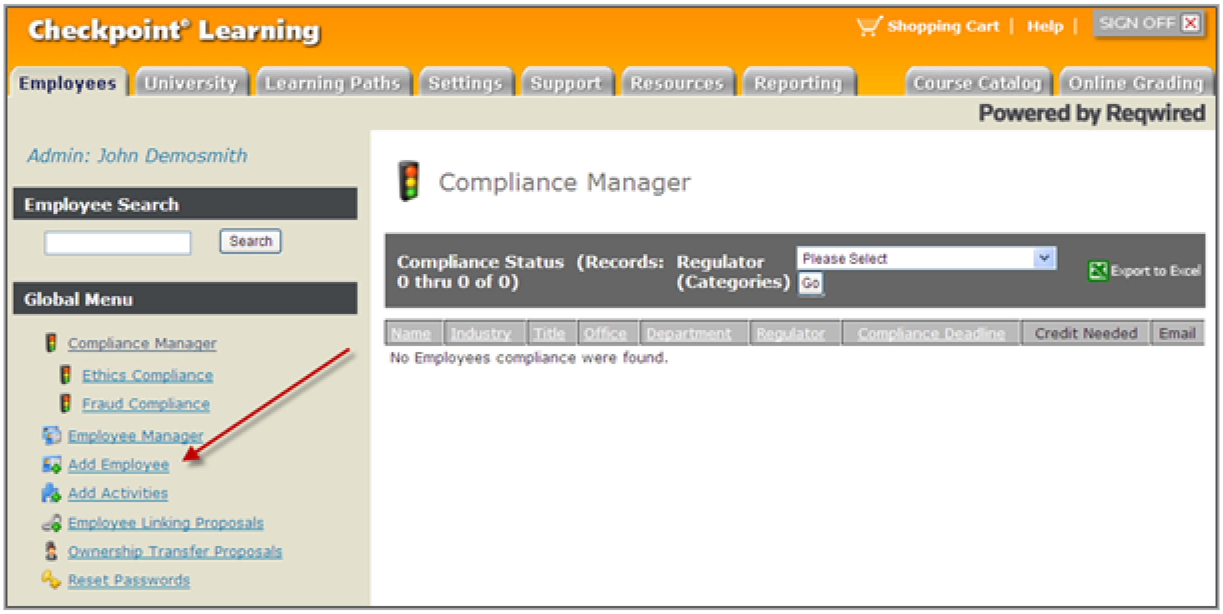
   The **Checkpoint Learning** page appears. (See above for what can be done on this page.)
2. Locate the **Checkpoint Learning Login** section on the right side of the screen.
3. Complete the following fields:
   - **User Name** – Enter your Firm Administrator user name.
   - **Password** – Enter your Firm Administrator password.
   - **Organization ID** – Enter your Firm Administrator org id.
4. Click the **Go** button.

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

How to Create Professional Accounts

The Compliance Manager serves as the administrator's *Homepage*. The Employees tab is where you go to create, view and edit professionals' accounts. Get started by creating your professional accounts:

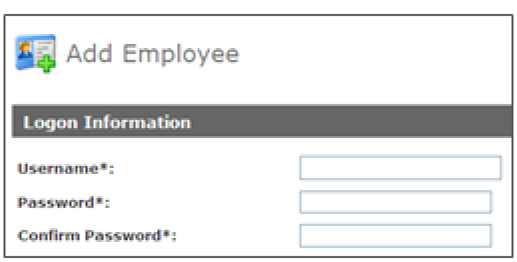
1. Click **Add Employee** under the Global Menu from the left panel. The **Add Employee** page is displayed.



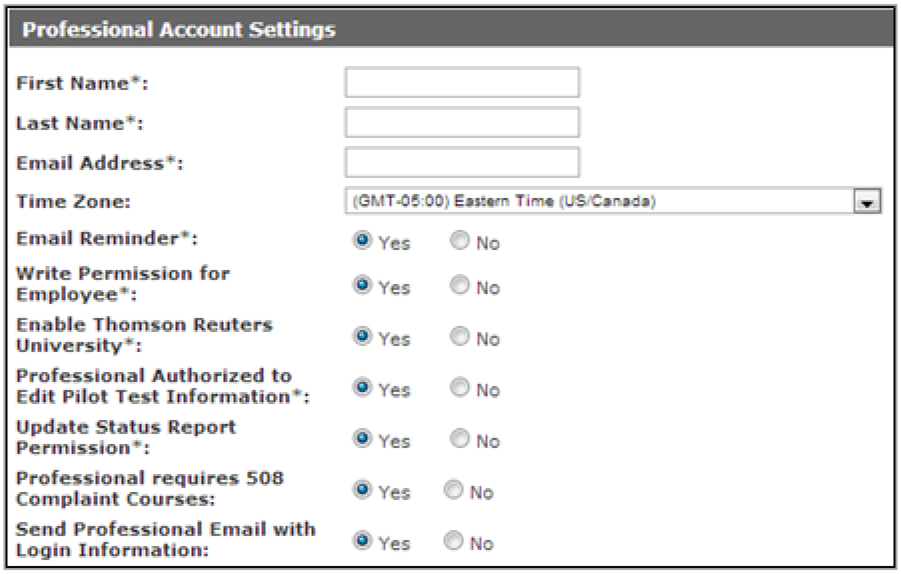
2. Create your user's login information in the Logon Information section.

Note: You will need to send the login information to each professional, so make note of the username and password you create for each employee.

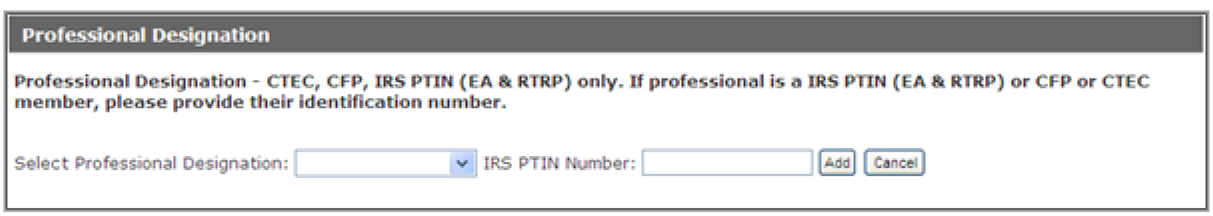
- **Username** - Enter a user name for the employee. User names must be a minimum of 6 characters and are not case sensitive.
  Note: Checkpoint Learning recommends using the employee e-mail address as the user name.
- **Password** -- Enter a password for the employee. Employees have the ability to log into their account and change their individual password.
  Note: Passwords must be a minimum of 6 characters and are not case sensitive.It is recommended that you use only numbers and letters.
- **Confirm Password** -- Re-enter the password for the employee.
  Note: The characters entered in this field must match the characters entered in the Password field or you will receive an error message.



3. Under **Professional Account Settings**, do the following:
   - **First Name** -- Enter the employee's first name
   - **Last Name** -- Enter the employee's last name
   - **E-mail Address** -- Enter the employee's e-mail address
   - **Time Zone** -- Select the time zone where the employee is located
   - **Radio Buttons** -- Select **Yes** for all radio buttons under **Professional Account Settings**.

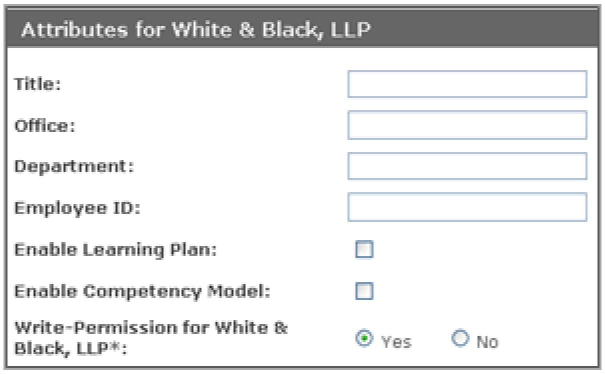


4. Under **Professional Designation**, do the following and repeat these steps for additional designations:
   - **Select Professional Designation** -- Select a designation from the drop down menu.
   - **ID Number** -- Enter the ID number and click the **Add** button.

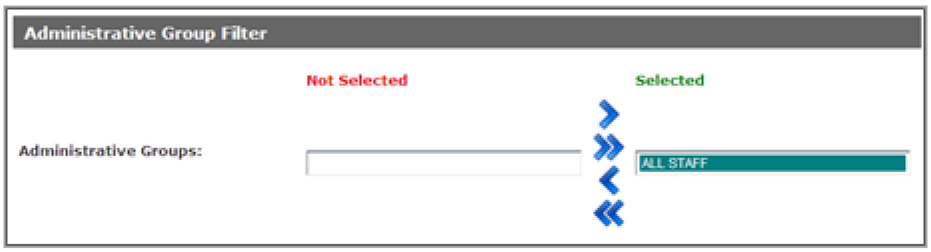


Note: It is important to add all relevant designations for each applicable professional so that Thomson Reuters may report appropriate Thomson Reuters sponsored credits to the IRS, CTEC and CFP boards.

5. All settings in the **Attributes for Organization Account** section should be left at their defaults. Make no changes to this section.



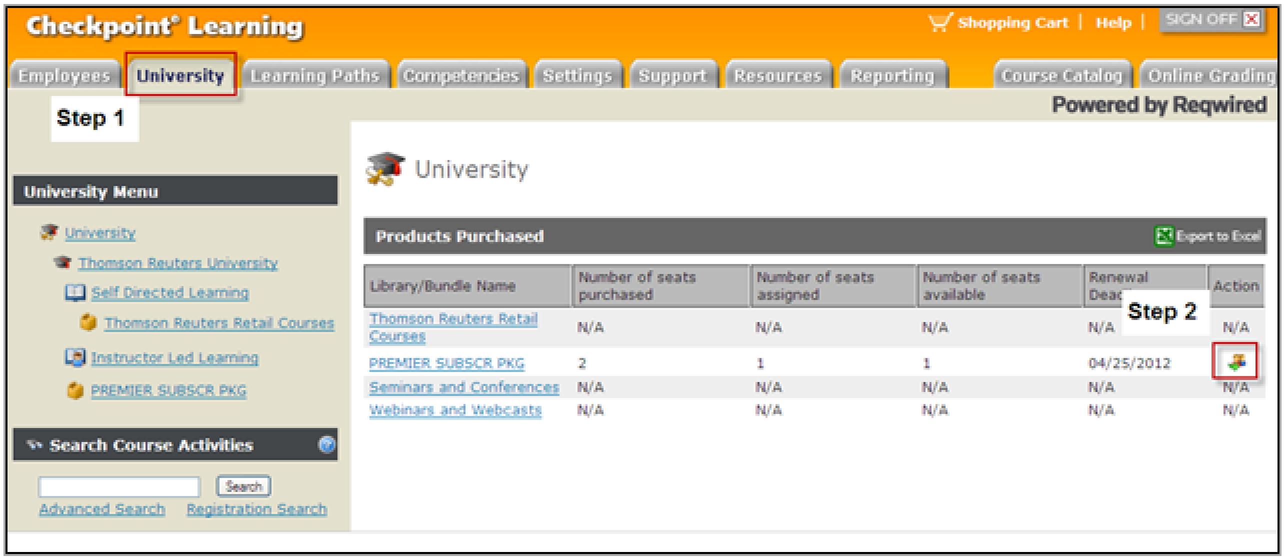
6. In the **Administrative Group Filter** section, click and move **All Staff** to the **Selected** side, then scroll to the bottom of the page and click the **Submit** button. Do not adjust any other settings.



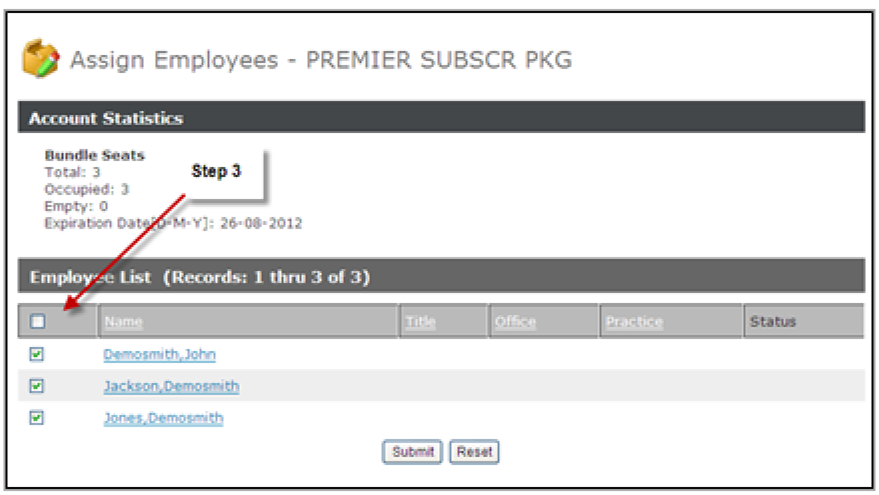
Assign Professionals to a Content Package

Complete the setup process by assigning your professionals to a content package to enable the tracking component and allow access to Thomson Reuters programs purchased in the package.

1. Click the **University** tab. The **University** page is displayed.
2. On the University page, click the Assign Employees icon for the content package that you want to assign.



3. Select the check box for each professional you want to have content, and then click the **Submit** button.



4. Send an email to each professional that includes:
   - Username
   - Password
   - Professional's Quick Reference Card

Click here for the email template provided by Thomson Reuters.

After receiving that email, the user will be able to login and access courses in online, live and webinar formats, as well as online grading exams and the requirements tracking component.