



CHECKPOINT LEARNING

FIRM PROFESSIONALS QUICK REFERENCE

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:

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

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

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

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

4. Click the **Go** button.

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

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

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 Menus** 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**.

Main Menu → Homeroom | Search Courses | Status Reports | Activity History | Learning | Competencies | Resources | Products | Online Grading

Display Panel → User: Bri A

Left Side Panel → CPE Status Reports

Regulator	Compliance Deadline	Credits Needed
AICPA	12/31/2019	117.8
AICPA - EBPAQC	01/01/2020	8.0
Alabama	09/30/2018	35.0
Alaska	12/31/2019	75.0
Alaska	12/31/2017	NONE
Arizona	01/31/2019	76.0
Arkansas	12/31/2018	N/A
Arkansas	12/31/2017	N/A
California	10/31/2018	75.0
Certified Information Systems Auditor (CISA)	12/31/2018	120.0
Colorado	12/31/2019	65.0
Colorado	12/31/2017	79.0
Connecticut	06/30/2018	18.0
Connecticut	06/30/2017	NONE
Connecticut	06/30/2016	21.0
CTEC - California Registered Tax Preparer (CRTP)	10/31/2018	20.0
Delaware	06/30/2019	75.0
District of Columbia	12/31/2018	77.8
Florida	06/30/2018	78.0
Georgia	No Deadline	TBD

My Registrations

Start Date/Time	Title	Sponsor	Format	Action
12/17/2018 08:00 AM	UPDATE Level Test Webinar for QA1A MOBILE_050	Checkpoint Learning (Group Internet Based)	Webconference	🔒

Learning Plan (Brianna Anderson)

Title	Sponsor	Importance	Target Date	Status	Comment
No items have been added to this learning plan.					

Learning Plan (White & Black, LLP) Last Confirmed: 05/22/2018 by Bri Anderson










To see a complete list of the courses included in your Learning Plan, select either the title or the More... link.








Title	Sponsor	Importance	Target Date	Status	Comment
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Element	Description
Homeroom	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.
Search Courses	View the training courses you have if you purchased a subscription package.
Status Reports	View regulators that have been added to your account and add regulators.
Activity History	Perform functions related to course activities, certificates, and documents.
Learning	View and launch on-demand and online grading courses. View your firm's

Element	Description
	Live Learning calendar.
Competencies	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.
Resources	Access regulator information and rules, and access state and society web sites.
Search Courses Tab	Search for Thomson Reuters courses by title, description, delivery format, media format, and vendor.
Online Grading	Take paper-based, self-study exams online and get real-time testing results.
Applications	Access links to associated applications, such as Checkpoint, Thomson Reuters online resource for audit and accounting and tax research.
Shopping Cart	Purchase courses through your Checkpoint Learning account, view your order summary, and print or maintain an electronic log of your purchases.
My Profile	View your personal information. Access your account setting preferences and industries and the organizations to which your account is linked.
Help	View step-by-step procedures for using Checkpoint Learning features.
Sign Off	Exit Checkpoint Learning.

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

Symbol/Icon	Description
Title:*	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.
	View a helpful popup description about the purpose of the field and what information should be entered.
	Edit the associated information.
	Edit the associated information.
	Delete the associated information.
	Assign a learning path for an employee.
	Add associated information.
	Email associated information.
	Email associated information.
	Enable/disable associated information.

Symbol/Icon	Description
	Scroll backward and forward through associated information.
	Preview the associated information or document.
	Remove/unregister an associated activity.
	Print associated information.
	Duplicate a course.
	Add a course or course activity instance.
	Open a calendar from which you can select a date.

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.

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.

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.

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.

Course Catalog

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

You can access the Course Catalog in either of the following ways:

- Click the **Course Catalog** 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 Course Catalog, 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 Brand
- 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 Course Catalog to Search for Courses](#) topic.

To use other resources from the left side panel:

On the **Course Catalog** 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 Required, 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, Required, 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.

Use the Course Catalog to Search for Courses

The Course Catalog is the search engine for locating Thomson Reuters courses. The Course Catalog 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 Course Catalog by clicking the **Course Catalog** tab or the **Course Finder** button on the **Homeroom** page.

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

To use the Course Catalog to search for courses:

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

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

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







2. 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 Course Catalog

Element	Function
Keywords <input type="text"/>	Search for CPE solutions by entering a keyword in the search field.

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

Note: To find, purchase and register for On-Demand and Online Grading (self-study) courses on Checkpoint Learning, see [Checkpoint Learning On-Demand QRC](#) and [Checkpoint Learning Online Grading QRC](#) documents at Customer Help Center.

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.

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

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

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

Regulator Rule Highlights

Rule Summary: Launches regulator details and requirements.

Status Report

Compliance Period

Status Report Profile

PCAOB
Industry: Accountancy

Effective Date: 02/04/2005

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

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

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

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

Rule Highlights

Professional Proficiency Credit:

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

Credit Caps:

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

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.

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.

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