



Checkpoint Learning

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

As a Firm Administrator, you control your professionals' accounts and access. This guide is designed to get you started as a Firm Administrator and provides steps for the following:

- How to Login
- How to Create Professional Accounts
- How to Assign Professionals to Content Packages
- How to Add Regulators (licenses and certifications)
- How to Customize Settings

Be sure to sign up for our complementary training on Checkpoint Learning. Click [here](#) or visit <http://find.support.rg.thomsonreuters.com/training/default.asp> for the schedule.

Log In to Your Checkpoint Learning Account

To complete these steps, you will need your Firm Administrator username, password and organization id. Contact Support at: **1-800-431-9025 Option 2, then 3** or rg.cpecustomerservice@thomsonreuters.com to recover your login information.

CHECKPOINT® LEARNING

Home | CPE Solutions | CPE Brands | Sales & Support | Course Finder | Online Grading | Shopping Cart

Training & Solutions

- Online Learning
- Live Seminars & Conferences
- In-House Training
- Self-Study Courses
- Online Grading

Training & Brands

- MicroMash
- PASS Online
- Required

THE WEBINAR LEARNING NETWORK
LEARN WHAT YOU NEED TO KNOW—WHEN YOU NEED TO KNOW IT

Build learning and CPE into your busy schedule with ease... all you need is a high-speed internet connection and a phone.
MORE INFO >>

Checkpoint Learning

What does Checkpoint Learning mean to you? [Click here for answers to all your questions!](#)

CPE from the Tax & Accounting business of Thomson Reuters: all the brands you love, all the topics you need, all the learning methods available to make it easy for you. CPE Topics covered

Checkpoint Learning Login

Username:

Password:

Organization Id:
(Org. Admins Only)

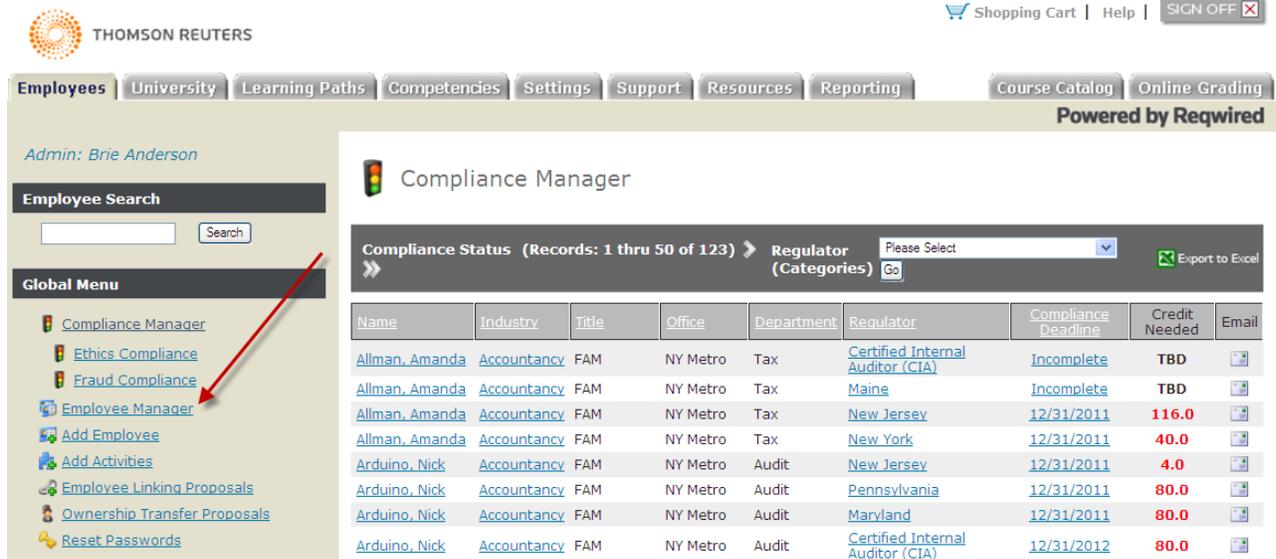
[Forgot Login?](#)
[New User Registration](#) **GO**

1. Click the link or copy and paste the link into your Web browser:
<https://checkpointlearning.thomsonreuters.com>. The **Checkpoint Learning Login** page is displayed.
2. Enter the following information before clicking the **Go** button:
 - a. **Username** – Enter your Firm Administrator username.
 - b. **Password** – Enter your Firm Administrator password.
 - c. **Organization ID** – Enter your Firm Administrator org id.

How to Create Professional Accounts

The **Compliance Manager** serves as the firm administrator's *Homepage* and will remain incomplete until professional's jurisdictions are entered. The **Employee's** Tab here 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 side panel. The **Add Employee** page is displayed.



THOMSON REUTERS

Shopping Cart | Help | SIGN OFF

Employees | University | Learning Paths | Competencies | Settings | Support | Resources | Reporting | Course Catalog | Online Grading

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Admin: Brie Anderson

Employee Search

Global Menu

- Compliance Manager
- Ethics Compliance
- Fraud Compliance
- Add Employee**
- Add Activities
- Employee Linking Proposals
- Ownership Transfer Proposals
- Reset Passwords

Compliance Manager

Compliance Status (Records: 1 thru 50 of 123) Regulator (Categories) Please Select Export to Excel

Name	Industry	Title	Office	Department	Regulator	Compliance Deadline	Credit Needed	Email
Allman, Amanda	Accountancy	FAM	NY Metro	Tax	Certified Internal Auditor (CIA)	Incomplete	TBD	
Allman, Amanda	Accountancy	FAM	NY Metro	Tax	Maine	Incomplete	TBD	
Allman, Amanda	Accountancy	FAM	NY Metro	Tax	New Jersey	12/31/2011	116.0	
Allman, Amanda	Accountancy	FAM	NY Metro	Tax	New York	12/31/2011	40.0	
Arduino, Nick	Accountancy	FAM	NY Metro	Audit	New Jersey	12/31/2011	4.0	
Arduino, Nick	Accountancy	FAM	NY Metro	Audit	Pennsylvania	12/31/2011	80.0	
Arduino, Nick	Accountancy	FAM	NY Metro	Audit	Maryland	12/31/2011	80.0	
Arduino, Nick	Accountancy	FAM	NY Metro	Audit	Certified Internal Auditor (CIA)	12/31/2012	80.0	

2. Enter your user's login information in the **Logon Information** section.
Note: We recommend using user's email address as their username.
3. Leave the default settings as they are with exception to write permission and the time zone. "Write permission" is the ability to add regulators and/or activities to a professional's own account.

Professional Account Settings

First Name*:

Last Name*:

Email Address*:

Time Zone: (GMT-05:00) Eastern Time (US/Canada)

Email Reminder*: Yes No

Write Permission for Employee*: Yes No

Enable Thomson Reuters University*: Yes No

Professional Authorized to Edit Pilot Test Information*: Yes No

Update Status Report Permission*: Yes No

4. In the **Administrative Group Filter** section, click and move **All Staff** to the **Selected** side, then click the **Submit** button.

To locate your employee accounts, click **Employees Tab>Employee Manager**.

How to Assign Professionals to a Content Package

Assign 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. Then click the **Assign Employees** icon.

The screenshot shows the Checkpoint Learning interface. The top navigation bar includes 'Employees', 'University' (highlighted with a red box), 'Learning Paths', 'Competencies', 'Settings', 'Support', 'Resources', 'Reporting', 'Course Catalog', and 'Online Grading'. Below the navigation bar, there is a 'Step 1' indicator. On the left, a 'University Menu' contains links for 'University', 'Thomson Reuters University', 'Self Directed Learning', 'Thomson Reuters Retail Courses', 'Instructor Led Learning', and 'PREMIER SUBSCR PKG'. Below the menu is a 'Search Course Activities' section with a search box and buttons for 'Advanced Search' and 'Registration Search'. On the right, the 'University' section displays a 'Products Purchased' table. The table has columns for 'Library/Bundle Name', 'Number of seats purchased', 'Number of seats assigned', 'Number of seats available', 'Renewal Date', and 'Action'. The 'Action' column for the 'PREMIER SUBSCR PKG' row contains an 'Assign Employees' icon (a person with a plus sign), which is highlighted with a red box and labeled 'Step 2'. An 'Export to Excel' button is also visible in the top right of the table area.

Library/Bundle Name	Number of seats purchased	Number of seats assigned	Number of seats available	Renewal Date	Action
Thomson Reuters Retail Courses	N/A	N/A	N/A	N/A	N/A
PREMIER SUBSCR PKG	2	1	1	04/25/2012	
Seminars and Conferences	N/A	N/A	N/A	N/A	N/A
Webinars and Webcasts	N/A	N/A	N/A	N/A	N/A

2. Select the checkbox for each professional you want to have content, and then click the **Submit** button.

Note: The first time you assign a professional to the content package, the following message will display; Course Catalog, Shipping Cart, and Online Grading will now be enabled for your organization. You may choose to disable each or all of these features by editing Custom Settings on your Settings tab. Disabling these features will limit your professionals' access to certain components of the Premier CPE Package.

Once the package has been assigned to the user, the user has access to the courses; online, live and webinar formats, as well as online grading exams and the requirements tracking component.

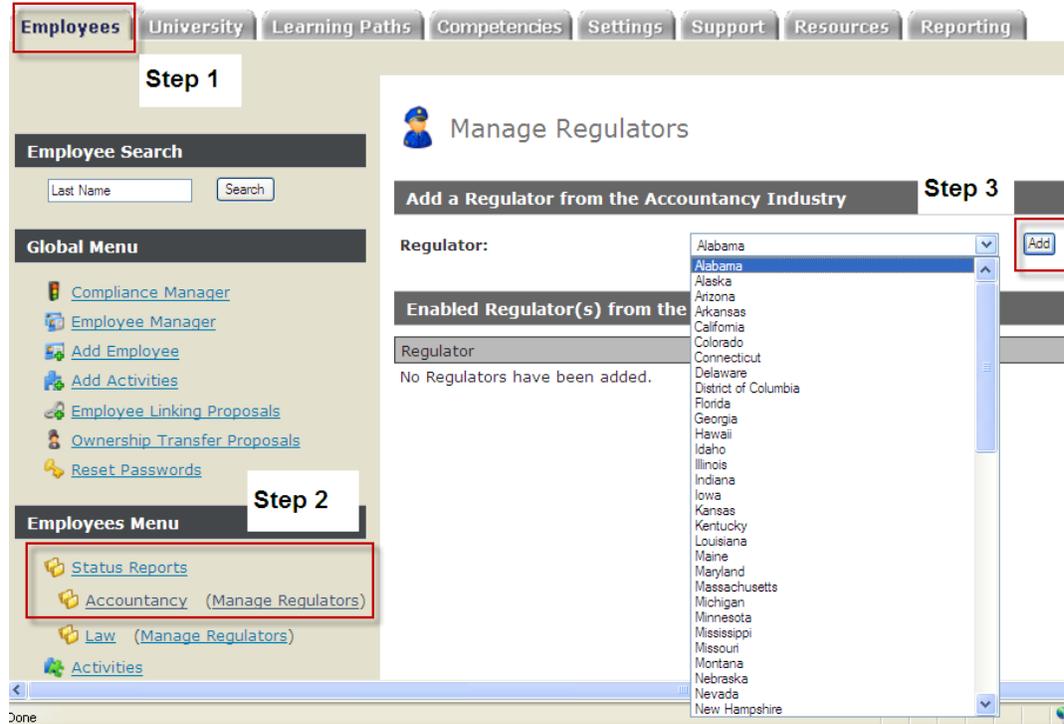
Provide your professionals with write access which enables them to add and update their requirements tracker. If you do not want your professionals to have write access, you can use the forms found in the following section to obtain your professionals' license information to enter it on their behalf:

Login as the Firm Admin and do the following: click the **Settings** tab, and then **Docs for Administrator > View Accountancy Status Report Questionnaires** and then select the desired regulator. Print as a pdf and attach it to an email for your professional to complete.

How to Add Regulators

As the Firm Administrator, you can enter and update your professionals' licenses and certifications. If you enabled write access for you professionals, they have the same ability to enter and update their professional licenses and certifications.

1. Click the **Employees'** Tab. Then click professional's name. The professional's **Account Profile** is displayed.
2. Click **Status Reports** from the **Employees Menu** located on the left side panel.
3. Click **Manage Regulators**. Then select the regulator from the drop down menu and click the **Add** button.



Note: After clicking the **Add** button, you will launch the regulators' questionnaire used to set up the status report for the professional. If you do not know the answers, you can leave (exit the questionnaire) by clicking somewhere else in the system. The professional with write access can complete the remaining questions for the regulator.

How to Customize your Professionals' Settings

Firm Administrators can control access to their professionals for the following:

- Single Sign-On Access to Checkpoint Research
- Purchase ability for courses outside the purchased and assigned package
- Search ability for courses outside the purchases and assigned package

To customize your professionals' settings, do the following:

1. Click the **Settings** tab, and then **Custom Settings** from the left side panel.
2. Click **Edit Custom Settings**, then scroll down to the **Professionals Settings** section.
3. Do any or all of the following, then click the **Submit** button:
 - **Course Finder** – Select the checkbox to turn on professionals' ability to search all of Thomson Reuters products.
 - **Applications** – Select the checkbox to turn on the professional's ability to synch Checkpoint Learning to Checkpoint Research for single sign-on access.
 - **Online Grading** – Select the checkbox to allow professionals to complete online grading exams as part of the content package.
 - **Shopping Cart** – Select the checkbox to allow professionals to purchase programs outside of the assigned content package.

Note: If Course Finder is selected and the Shopping Cart is deselected, the professional will receive the message to contact the Firm Administrator for purchase when the professional clicks the **Buy Now** button for a desired course.

The screenshot shows the 'Edit Custom Settings' page in a web application. The 'Settings' tab is selected in the top navigation bar. The left sidebar contains a 'Settings Menu' with 'Edit Custom Settings' highlighted. The main content area is titled 'Step 1' and 'Edit Custom Settings'. It features two sections: 'Professional Settings' and 'Administrator Settings'. Both sections have a table with 'Name' and 'Turn On' columns. In the 'Professional Settings' section, 'Course Finder', 'Applications', 'Online Grading', and 'Shopping Cart' are checked. In the 'Administrator Settings' section, all listed items are checked. A 'Submit' button is at the bottom right. Red boxes and labels 'Step 2' and 'Step 3' highlight the 'Edit Custom Settings' link and the 'Professional Settings' table respectively.

Name	Turn On
Course Finder	<input checked="" type="checkbox"/>
Applications	<input checked="" type="checkbox"/>
Online Grading	<input checked="" type="checkbox"/>
Ad Banner	<input checked="" type="checkbox"/>
TRTA News & Updates	<input checked="" type="checkbox"/>
Shopping Cart	<input checked="" type="checkbox"/>
Training & CPE Solutions	<input checked="" type="checkbox"/>
Competencies	<input checked="" type="checkbox"/>

Name	Turn On
Course Finder	<input checked="" type="checkbox"/>
Ad Banner	<input checked="" type="checkbox"/>
TRTA News & Updates	<input checked="" type="checkbox"/>
Shopping Cart	<input checked="" type="checkbox"/>
Training & CPE Solutions	<input checked="" type="checkbox"/>
Competencies	<input checked="" type="checkbox"/>

How to Login to your Professional Account

Welcome to Checkpoint Learning and your streamlined access for tracking continuing education credits and taking online, webinar, and live continuing education programs. Here is how to get started:

1. Click or copy/paste the following into a web-browser:
<https://checkpointlearning.thomsonreuters.com>
2. Enter in your username, your email address and the password, then click the **Go** button. You are directed to your **Homeroom**.

My Profile | Help | SIGN OFF X

Homeroom My CPE Status Reports Activity History Learning Competencies Settings Resources Course Catalog Online Gradin

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CPE Status Reports

Regulator	Compliance Deadline	Credits Needed
Certified Internal Auditor (CIA)	No Deadline	TBD
Maine	No Deadline	TBD
New Jersey	12/31/2011	116.0
New York	12/31/2011	40.0

News & Updates

Hot Topics

- [Year-End Web Conference](#) *New!*
- [Competency Model](#)
- [Corporate Curriculum](#)
- [ONESOURCE Integration](#)
- [Small Business Central](#)
- [Single Audit CPE](#)

Upcoming Webinars

[View Schedule of Upcoming Webinars \(PDF\)](#)

Class Information

[Course Finder](#)

[CPE & Training Interactive Catalog](#)

How to Add Regulators to Your Account

Begin tracking your state license or certificate requirements with Checkpoint Learning.

1. Click the **Status Reports** tab.
2. Click **Status Reports** from the left side panel, and then click **Manage Regulators**.
3. Select the regulator from the drop down menu and click the **Add** button.
4. The system will launch a questionnaire to set up your status report. Answer the questions and click the **Submit** button to advance to the next screen.
5. Click the **Save** button. Your status report is displayed.

How to Launch or Register for Programs

All your purchased programs are displayed in the **My CPE** tab. You can search for specific courses by topic, term or format.

For online programs, select the desired format (download or online), then click the **Launch** button.

Tip: 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.

For Webinars, click the **Register** button.