



CHECKPOINT LEARNING SUPPORT FOR IRS

Thomson Reuters provides support in the following areas for IRS:

- **Professional Registration Process** – This section covers how to register IRS professionals for a Checkpoint Learning account.
- **Professional Course Orders** – This section covers how to order courses for IRS professionals.
- **Approving /Rejecting Course Requests** – This section reviews how to approve courses requested by IRS professionals.

Professional Registration Process

You will be given a list of users to create IRS Professionals. From this list you will need the first name, last name and IRS email address.

The IRS has their own registration page in which to create professional accounts.

1. Click [here](#) to view the **IRS Registration on Checkpoint Learning** page.

IRS Registration Page

IRS Registration On Checkpoint Learning

Welcome to the IRS Registration page for Checkpoint learning

Learners with a need for 508 compliant courses should proceed to the following link, [508 information and accessibility](#).

Checkpoint Learning replace the MicroMash legacy site and delivers courses from both MicroMash and PASS Online on a new unified platform to streamline and enhance your learning process.

IRS learners must complete this initial one-time registration form to establish a basic learning profile in the new Checkpoint Learning system. Please provide your IRS Email Address, First Name and Last Name and click Register Now button below.

You will then receive an email with your Checkpoint Learning username and password and a link to the special site for placing IRS course orders. Please save this email for future reference for ordering courses.

Email Address:

First Name:

Last Name:

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2. Enter the email address, first and last name of the IRS professional. Click the **Register Now** button.

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

Upon clicking the **Register Now** button, the **Registration Confirmation** email is sent to the professional's mailbox. A sample of the **Registration Confirmation** is below.

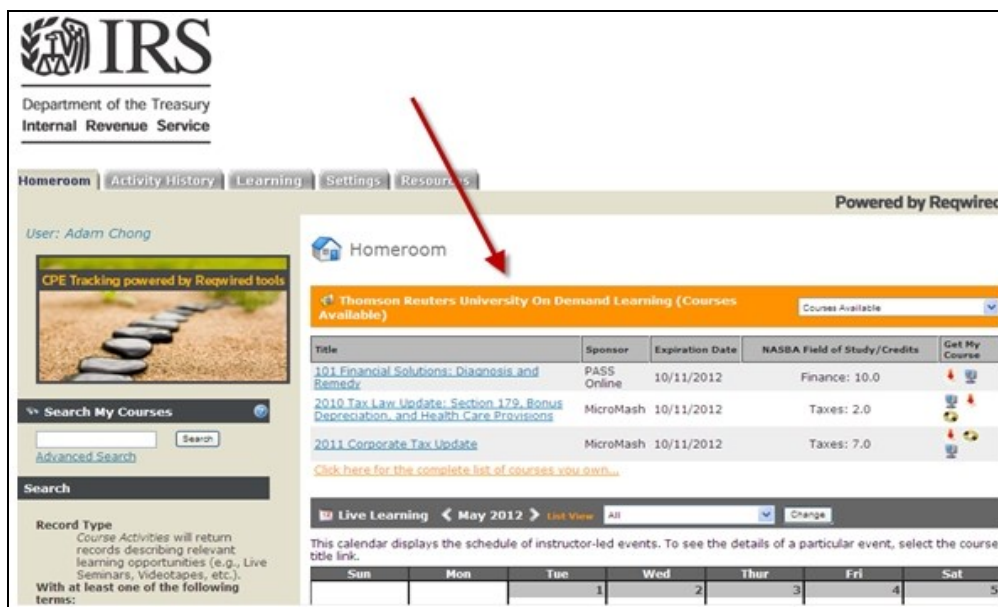
Sample Registration Confirmation Email



Professional Course Order Process

You will be provided a list of courses to request or register for each professional. Unless otherwise specified, always select **ONLINE COURSES**

1. Using the Internal Tools, ghost login to the IRS professional account. The professional's Homeroom is displayed.
2. Click **Thomson Reuters University On Demand Learning (Courses Available)**.



3. Locate the course and click the online icon. The **Course Registration** page is displayed.

Thompson Reuters University On Demand Learning				
Courses Available		[Records: 1 thru 50 of 346]		Export to Excel
Title	Semester	Expiration Date	NASBA Field of Study/Credits	Get My Course
101 Financial Solutions: Diagnosis and Remedy	PASS Online	10/11/2012	Finance: 10.0	Get My Course
2010 Tax Law Update: Section 179, Bonus Depreciation, and Health Care Provisions	MicroMash	10/11/2012	Taxes: 2.0	Get My Course
2011 Corporate Tax Update	MicroMash	10/11/2012	Taxes: 7.0	Get My Course
2011 FASB Update	MicroMash	10/11/2012	Accounting: 8.0	Get My Course
2011 Individual Tax Overview	MicroMash	10/11/2012	Taxes: 10.0	Get My Course
2011 Individual Tax Update	MicroMash	10/11/2012	Taxes: 8.0	Get My Course
2012 Personal and Professional Ethics for North Carolina CPAs	PASS Online	10/11/2012	Regulatory Ethics: 4.0	Get My Course
A Complete Guide to Investing	PASS Online	10/11/2012	Administrative Practice: 14.0	Get My Course
A Practical Guide to Mergers, Acquisitions and Divestitures	PASS Online	10/11/2012	Management Advisory Services: 5.0	Get My Course
Accountant's Overview of Financial Management	PASS Online	10/11/2012	Accounting: 4.0	Get My Course
Accounting and Auditing Real Estate Transactions	MicroMash	10/11/2012	Accounting: 7.0	Get My Course
Accounting and Financial Reporting Developments	PASS Online	10/11/2012	Accounting: 11.0	Get My Course

4. Do the following:

- **Address 1** – enter a “1”
- **City** – enter a “1”
- **State** – Select a state from the drop down menu.
- **Email Address** - enter a “1”

5. In the **Coordinator Section**, do the following then click the **Submit** button:

- **Business Unit** – Select TRTA from the drop down menu.
- **Select Coordinator** – Select from Daria, Chris or Brie.

Note: Once you click the Submit button, an email is sent to the selected Coordinator. Be sure to instruct the Coordinator you chose to send you the email upon receipt or to approve the course request.

6. Click the **Sign Off** button when you have ordered all courses for the professional or return to step 2.

Coordinator Approval Process

You will be forwarded the Coordinator’s Approval email.

Sample Coordinator Approval Request Email

The email below is received by the Coordinator when a professional submits a course order request.

The following order has been submitted for your approval.

Course Details	
Title:	Introduction to Business Valuation and Use of Comparables
Sponsor:	MicroMash
Format:	Online
Order Form Details	
Professional Name:	Chris Horne
Professional E-Mail:	chris.horne@thomsonreuters.com
Request Date:	2011-10-25
Address 1:	1455 Research Blvd
Address 2:	
City:	Rockville
State:	MARYLAND
Zip Code:	20850
Country:	United States
Daytime Phone:	301-545-4426
Comments & Requests:	
NOTE: For questions on ordering courses, please contact your coordinator.	
Decision:	
Approve Course:	Approve
Reject Course:	Reject

1. From the email, click **Approve**. A new window will open displaying the IRS CPL login screen.
2. Enter the Coordinator username, password and org ID.

Sample Coordinator Approval/Rejection Login Screen

Sign In / Setup Account

If you have previously registered with Checkpoint Learning, please enter your Username and Password below.

If you have never registered with Checkpoint Learning, please select "New User Registration" link below.

Checkpoint Learning Login

User Name:

Password:

Organization Id:

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

3. Delete this text and replace it with your own content.

Sample Coordinator Approval/Rejection Login Screen

The screenshot shows the Checkpoint Learning web interface. At the top, there is a navigation bar with links for Employees, University, Learning Paths, Settings, Support, Resources, and Reporting. A user is logged in as Admin: Chris Horne. A message box displays "Email Course Registration Result Confirmation" with a "Results 10/25/2011 08:17 AM" header. Below the message is a table with the following data:

Name	Email Address	Email Notification Status
Horne Chris	chris.horne@thomsonreuters.com	Success

Completing these steps will prompt Checkpoint Learning to email the professional that the course has been approved and directions to launch the course.

Glossary

A

Account Profile

Checkpoint Learning employee data record that contains the employee's professional account settings, attributes, groups, CE tracking modules (such as regulators), coaches, and owner of the account.

Accreditation

The process of applying appropriate credit hours and applicable subject areas toward a particular program or activity.

Activity Profile

Checkpoint Learning activity data details that include activity title, description, sponsor, format (such as live, self-study, teaching, publication), credit hours, completion date, and accreditation.

AICPA

American Institute of Certified Public Accountants. The AICPA is the professional organization for CPA members in the U.S. Sets ethical and auditing standards for public and private companies, nonprofit organizations, and governments. Develops and administers the CPA exam and licensure.

C

CE

Continuing Education. Generally, after licensure, regulators require CE so that licensees maintain professional competence and expertise in the field.

CE Tracking

An application within Checkpoint Learning that tracks activities/courses against regulators' continuing education (CE) requirements.

Certificate

A document that verifies course completion. Generally presented to those completing a course, this document usually states the title of the course, location, date completed, applicable subject areas, credit amounts, participant name, and sponsor name.

CFP

Certified Financial Professional

CLE

Continuing Legal Education. CLE is the equivalent of CE (or CPE) but applicable to registered attorneys/lawyers.

Competency

A particular skill needed to perform a specific financial or accounting role/task in a job, organization, or profession.

Conference/Live Seminar

A learning activity or event that the individual professional or firm professional attends in person that is presented by a live teacher/lecturer.

Course Activity

An in-house (or external) class that is posted to the Live Learning calendar by the Firm's Administrator. These course activities have particular start/end dates and start/end times.

Course Catalog

Checkpoint Learning's search engine that lets you search for either your own company's courses or Thomson Reuters courses by title, description, delivery format, media format, and vendor.

Course Profile

Checkpoint Learning's basic course information that includes title, course code, status, description, field of study/subject area, format, learning level, prerequisites, credit hours, and technical requirements.

CPA

Certified Public Accountant

CPE

Continued Professional Education. CPE is often used interchangeably with CE.

CPL

Checkpoint Learning (CPL) is Thomson Reuter's comprehensive, web-based application built to support all aspects of a company's learning needs.

D

Download Course

A course that is installed on your hard drive and accessed through the Checkpoint Learning Offline Player, allowing you to work through the course

without being connected to the Internet.

F

FA

A Firm Administrator (FA) is an individual who manages the Checkpoint Learning application for an organization or company. The FA controls access, manages professional accounts, manages activities/courses, manages and assigns learning plans, customizes account settings, and runs reports as needed.

FP

A Firm Professional (FP) is an individual who uses Checkpoint Learning as part of a larger organization or company.

I

IP

An Independent Professional (IP) is an individual who uses Checkpoint Learning without being part of a larger organization or company.

L

Learning Plan

A collection of courses that a Firm Administrator assigns to employees and which must be completed by a specified date.

LMS

Learning Management System

N

NASBA

The National Association for the State Board of Accountancy (NASBA) is dedicated to enhancing the country's 55 State Boards with high-quality, effective programs and setting standards for these program developments. NASBA Registry/QAS sponsors must adhere to NASBA standards when developing and delivering training to accountants. Thomson Reuters is a NASBA Registry and NASBA QAS sponsor.

O

On-Demand Course

A course that can be launched at anytime from anywhere you have Internet access. In Checkpoint Learning, you can launch courses from the Homeroom tab or Learning tab.

Online Course

A course that you launch and take in an online format.

Online Grading

Self-study, print-based course exams that you can complete online and receive real-time test results.

P

PCAOB

The Public Company Accounting Oversight Board (PCAOB) is a private-sector, nonprofit corporation created by Congress to oversee the audits of public companies to protect the interests of investors and to prevent fraud.

Q

QAS

Quality Assurance Service (QAS) is a NASBA certification that is applied to eLearning courses that have the highest level of quality in development and presentation.

R

Registrant

Someone who is registered for a course activity.

Regulator

An organization or licensing body that develops, maintains, and enforces rules/regulations for a particular license. Generally, a regulator's rules and regulations include continuing education requirements.

S

Sponsor

A person/organization who develops and supplies continuing education courses/activities to licensees. Often, sponsors are required to register with state boards and/or NASBA before being approved to deliver their education programs.

State Board

An organization that sets the standards and rules for what it takes for accounting professionals to practice in the state.

W

Webinar

A seminar, class, or event conducted over the Internet with a live, remote presenter.