**THOMSON REUTERS**

# Checkpoint Learning User Guide
## IRS Coordinators – Approval Process

This document is for IRS Coordinators of Checkpoint Learning and covers the process of Approving/Rejecting Course Requests from IRS professionals and running reports for courses ordered and courses completed. IRS Coordinators who want to review the process of signing up for a Checkpoint Learning account and the process of ordering a course, please access the Getting Started section in the IRS Support site.

As an IRS Coordinator, your Coordinator account in Checkpoint Learning has already been created for you.  You do not have to register for an IRS Coordinator account.  To login to your IRS Coordinator account in Checkpoint Learning, you will enter the following three credentials under the Checkpoint Learning Login page:

- Username:        FirstName.LastName (Note: Your username is the first half of your IRS email address only. For example: Chris.horne@irs.gov email address would have a username of chris.horne)

- Password:        password

- Organization ID:   IRSMain (Note: Only Coordinators use this organization ID. This is what distinguishes you as a Coordinator. Learners leave this blank when logging into their homeroom).

***These instructions assume that the IRS learners has successfully registered for Checkpoint Learning and has logged into their account, completed a course request order form, and submitted the request to their IRS Coordinator for approval.***

## Coordinator Approval Process

Once an IRS learner complete the course order process, their selected coordinator will receive an email with the option to approve or reject the course order.  Coordinators should first click the link in the Course Request notification email to reach the Coordinator approval page. You will be directed to the Coordinator approval/rejection page based on whether you approve or reject the course request. Once you click approve/reject, a new internet browser window displays the IRS Checkpoint Learning Login page. Enter your Coordinator login credentials (shown above) and the system will verify your rights to approve/reject the course.

Once logged into Checkpoint Learning (using the special Coordinator login provided), click the **Course Catalog** tab, and you can search and review the requested course information by clicking the desired courses title.

**Note:** At any time, you can login to your Coordinator account and view all your course requests, pending and cancelled by clicking on the **Settings** tab and **Pending Requests** from the left side panel.

During the approval process, Coordinators should review the following:

- **Course Details**: Identify which course is being requested.

- **Order Form Details**: Identify who is requesting the course.

- **Decision** section: Make the approval decision known to the professional by selecting one of these options:

  - **Approve** – Click to approve the course. An email will be sent to the professional, confirming your approval. The email will contain the instructions, based on the course format, for accessing the course.

  - **Reject** – Click to reject the course. An email will be sent to the professional, confirming that you do not approve the course.

## Sample Coordinator Approval Request Email

Whenever a professional submits a course order request, the Coordinator receives a *Coordinator Approval Request* email like the one shown in the following example:

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 |

## Coordinator Approval Process (Continued)

### Sample Coordinator Approval/Rejection Login Screen

Once a Coordinator clicks either **Approve** or **Reject** from the course request notification email, a new Internet browser window will display a login screen. Enter your Coordinator credentials to Checkpoint Learning (using the special Coordinator login) and click the **Go** button.



At login, the **Email Course Registration Result Confirmation** is displayed:



From this screen, click the **Sign Off** button in the upper right to log out of Checkpoint Learning, thereby completing the approval/rejection process.

# Coordinator Approval Process (Continued)

## Sample Professional Approved Course Email

When the coordinator approves a program, professionals receive an email, as shown in the following example:

Thank you for ordering the "Introduction to International Financial Reporting Standards" course from Checkpoint Learning. Your order has been authorized and will be available for launch on your Checkpoint Learning On Demand course list.

To launch the course:

1. Visit http://checkpointlearning.thomsonreuters.com and login with your user name and password
2. Launch the course from Thomson Reuters University On Demand list of courses by selecting the Online Course icon.

**Course Details**

| | |
|---|---|
| **Title:** | **Introduction to International Financial Reporting Standards** |
| **Sponsor:** | MicroMash |
| **Format:** | Online |

**Order Form Details**

| | |
|---|---|
| **Professional Name:** | Chris Horne |

## Sample Professional Rejected Course Email

When the coordinator rejects a program, professionals receive an email similar to the following example:

Your order for the course "Human Resource Management: An Introduction to the Workforce" was not authorized. Please contact your coordinator for further information.

**Course Details**

| | |
|---|---|
| **Title:** | **Human Resource Management: An Introduction to the Workforce** |
| **Sponsor:** | MicroMash |
| **Format:** | Online |

**Order Form Details**

| | |
|---|---|
| **Professional Name:** | Chris Horne |
| **Professional E-Mail:** | chris.horne@irs.gov |
| **Request Date:** | 2011-10-24 |
| **Address 1:** | 1455 Research Blvd |
| **Address 2:** | |
| **City:** | Rockville |
| **State:** | MARYLAND |
| **Zip Code:** | 20850 |
| **Country:** | United States |
| **Daytime Phone:** | 3015454372 |

## Cancellation of Course Approval Request by IRS Professional

If an IRS Professional submits the course request to the <u>wrong</u> coordinator for approval. That coordinator can simply reject the request, and then the IRS Professional can resubmit the course request to the proper coordinator. In addition, IRS Professionals can cancel a Course Approval request in their Checkpoint Learning account. If they cancel their request, the coordinator will receive the following email notification:

### Sample Professional Rejected Course Email

The following order has been submitted for your approval, but has been cancelled by the professional :

**Cancellation Details**

| | |
|---|---|
| **Course Title:** | **Introduction to Business Valuation and Use of Comparables** |
| **Professional Name:** | Chris Horne |
| **Professional E-Mail:** | chris.horne@thomsonreuters.com |
| **Cancellation Date:** | 10-25-2011 |

This is a notification only email. Please do not attempt to accept or reject the original course request.

**Note**: No action is required on the coordinator's part, but the coordinator should <u>not</u> attempt to accept or reject the original course request. Any action taken on the Course Approval Request email after the professional cancels the request will not be applied, and the Confirmation screen will remind you that the professional has cancelled the request.

## Coordinator Login for Report Generation

To log in as a coordinator to run reports perform the following steps:

1. Click here to access the Checkpoint Learning login page for coordinators:

**Checkpoint Learning Login**

User Name:
chris.horne

Password:
••••••••

Organization Id:
irsmain

Forgot Login?   GO

IRS
Department of the Treasury
**Internal Revenue Service**

Welcome to the Internal Revenue Service Checkpoint Learning home. Our unique partnership with IRS brings you high quality CPE courses in auditing, accounting, taxation, management and more.

Checkpoint Learning replaces 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.

2. Complete the following fields:
   - **User Name** – Enter your user name, which is your email address before the @ symbol of your email address. For example, if your email address is chris.horne@irs.gov, then your user name is **chris.horne**.
   - **Password** – Enter the word "**password**."
   - **Org ID** – Enter the word "**IRSmain**."

3. Click the **Go** button to display the **Compliance Manager** page.

## Reports

As a coordinator, you can run reports on the courses your professionals have ordered and completed. Checkpoint Learning has report templates that you can customize and save, refreshing with new data at the click of a button. Once run, the reports can be exported to Microsoft® Excel.

There are two main reports for you to run:

- **Courses Ordered –** Run this report to receive a list of the professionals who have ordered courses.

- **Course Completion Report for Usage –** Run this report to see a list of professionals who have completed courses.

To run the Courses Ordered report, perform the following steps:

1. Click the **Reporting** tab to open the **Reporting Manager**:



2. To run a report on the **Courses Ordered** by your professionals, click on the Preview (" ") icon, follow the steps outlined below and then click the **Save** button, or skip to step 5. The report is displayed.



**Preview**    **Edit**

3. Click **Edit** ("  ") icon to edit the report template you already created before running the report again.

4. To refresh the current report with new data, click the **Preview** ("  ")icon under the Action column for the Courses Ordered report template. The *Instances – Courses Ordered* page is then displayed.

## Reports (Continued)

5. Click the **New Instance** button to create a new report. The *New Instance – Courses Ordered* page is displayed.

6. In the **Report Instance Name** field, type a name for your report. This name should help you locate or specify your specific report so you can refresh with the newest data.

7. In the *Select Columns* section, select the columns you want to display by clicking the column name and then clicking the **Add** button. Use the Up and Down arrows to order the columns as you want them to appear in the report. (It is recommended that you select all column names except CLIN.)

8. In the *Select Filter* section, select **Coordinator** from the drop-down menu.  Then select **Equal to** from the adjacent drop-down menu, and then click the **Add** button.  In the **Value** field, type your name (first name and last name, chris horne, for example).

9. From the **Select Grouping** drop-down menu, select **Coordinator**.

10. In the *Add Sorting* section, sort professionals by selecting an option from the **Group By** drop- down menu.  Then click the **Add** button.



11. Click **Save**.

## Reports (Continued)

### Sample Courses Ordered Report

Here's a sample of the **Courses Ordered** report:



**Note**: Once the report is displayed, you can export it to Excel by clicking **Export to Excel**.

To run the Course Completion Report for Usage on the courses completed by your professionals, perform the following steps from the Reporting tab:

1. Click the **Preview** (" ")icon under the Action column on the *Courses Completion Report for Usage* template, which will display the *Instances – Courses Completion Report for Usage* page.

2. Click the **New Instance** button to display the *New Instance – Courses Completion Report for Usage* page:
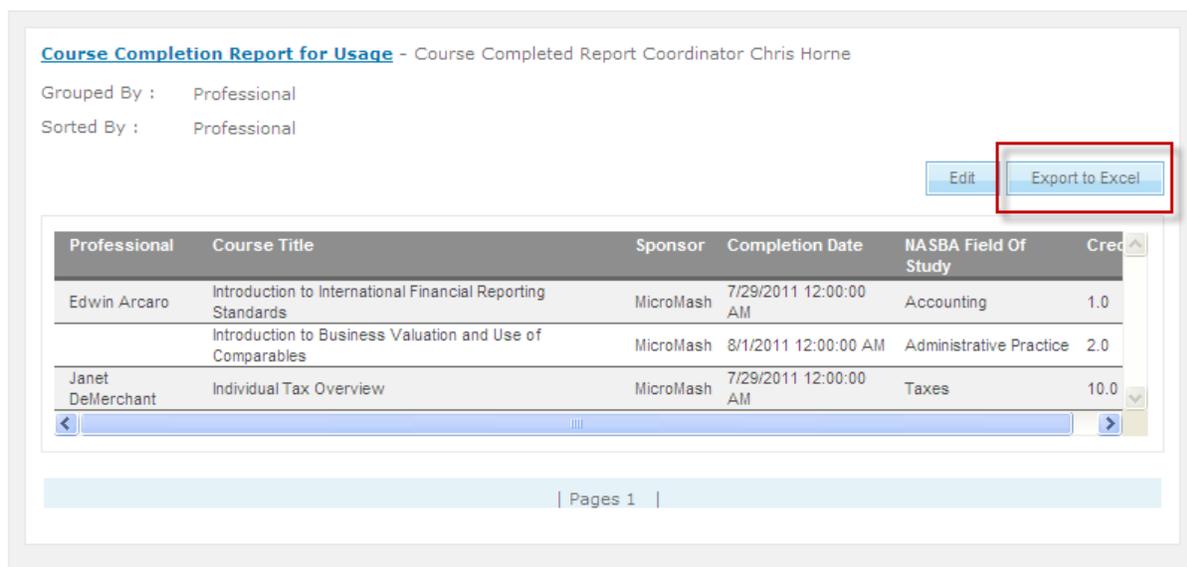
3. In the **Report Instance Name** field, type a name for your report. This name should help you locate or specify your specific report so it will be refreshed with the newest data.

4. In the *Select Columns* section, select the columns you want to display by clicking the column name and then clicking the **Add** button (under *Select Filter*). Use the **Up** and **Down** arrows to order the columns as you want them to appear in the report. (It is recommended that you select the following column names: Professional, Sponsor, Credits, NASBA Field Of Study, Completion Date, and Course Title.)

5. In the *Select Grouping* section, select an option from the **Group By** drop-down menu.

6. In the *Select Sorting* section, to sort professionals, select an option from the **Sort By** drop-down menu.

7. Then click the **Add** button.

8. Finally, click **Save** to display the report.

### Sample Course Completion Report

Here's a sample of the **Course Completion Report for Usage** report:



**Note**: Once the report is displayed, you can export it to Excel by clicking **Export to Excel**.