Checkpoint Learning IRS Coordinator Job Aid

IRS Coordinator Job Aid

August 2016

Objectives

- ❑What is Checkpoint Learning?
- ❑What is your role as a Coordinator?
- ❑What is the process for requesting courses?
- ❑How to approve/reject an individual course?
- ❑How to approve/reject bulk course requests?
- ❑How to change course media format?
- ❑How to run reports?
- ❑New Features
- ❑Support

What is Checkpoint Learning?

Checkpoint Learning is an online platform that provides a variety of topics of continuing education in two different formats: Online (*internet connectivity required), Download (*internet connectivity not required to complete course).

Each IRS professional has an end-user account.
IRS Coordinators have two accounts, one as an end-user and one as the Coordinator.

Each account has it’s own separate login.

What is the Process?

IRS Professional

- Orders the course via request form.
- Selects IRS Coordinator to approve.

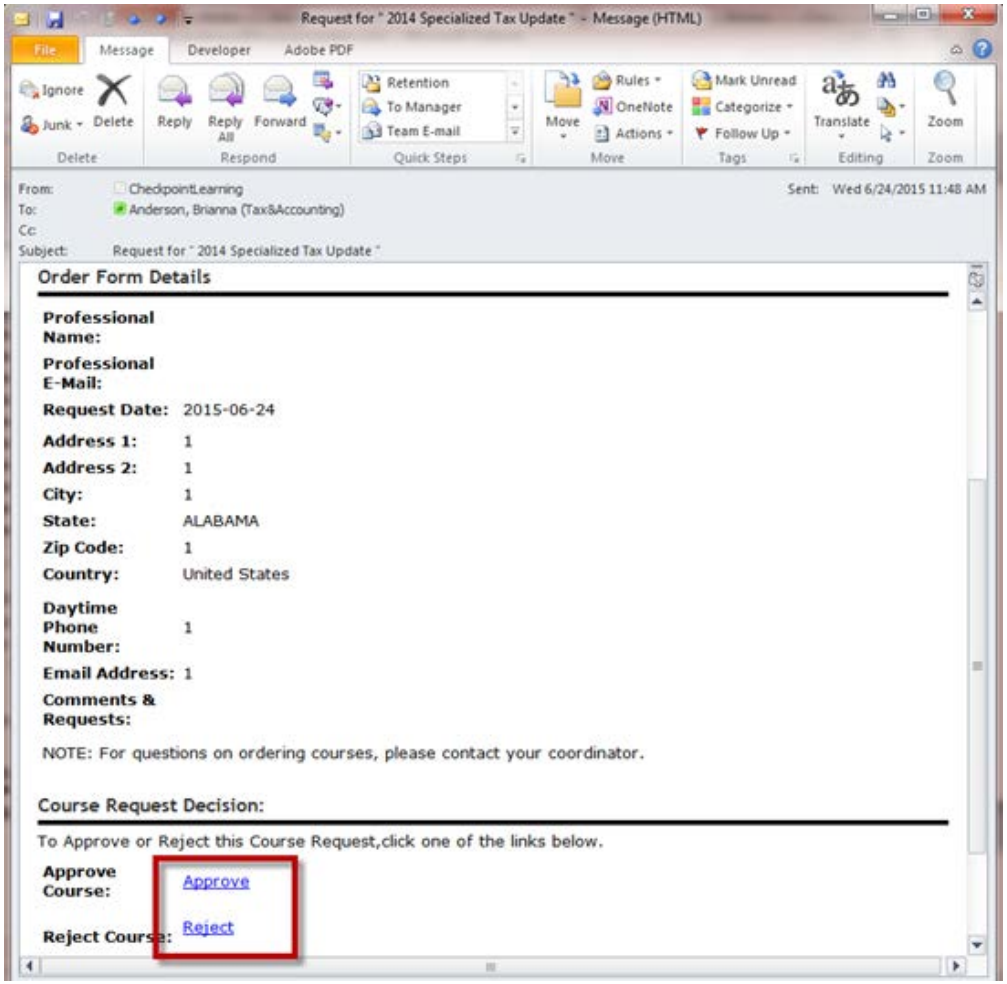
IRS Coordinator

- Receives course request via email.
- Confirms funding with Program Manager
- Approves/rejects course request

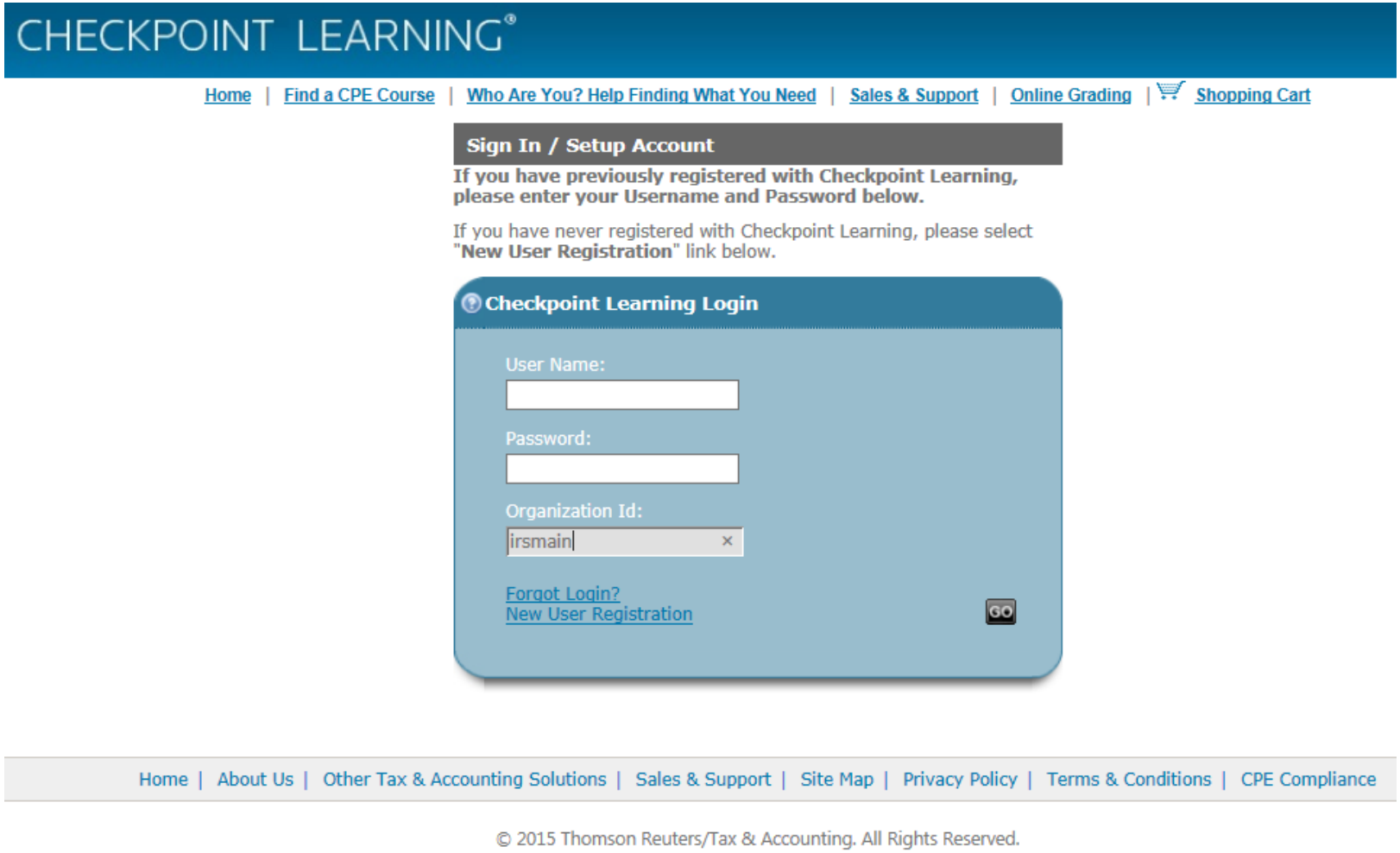
IRS Professional

- Receives course access via email.

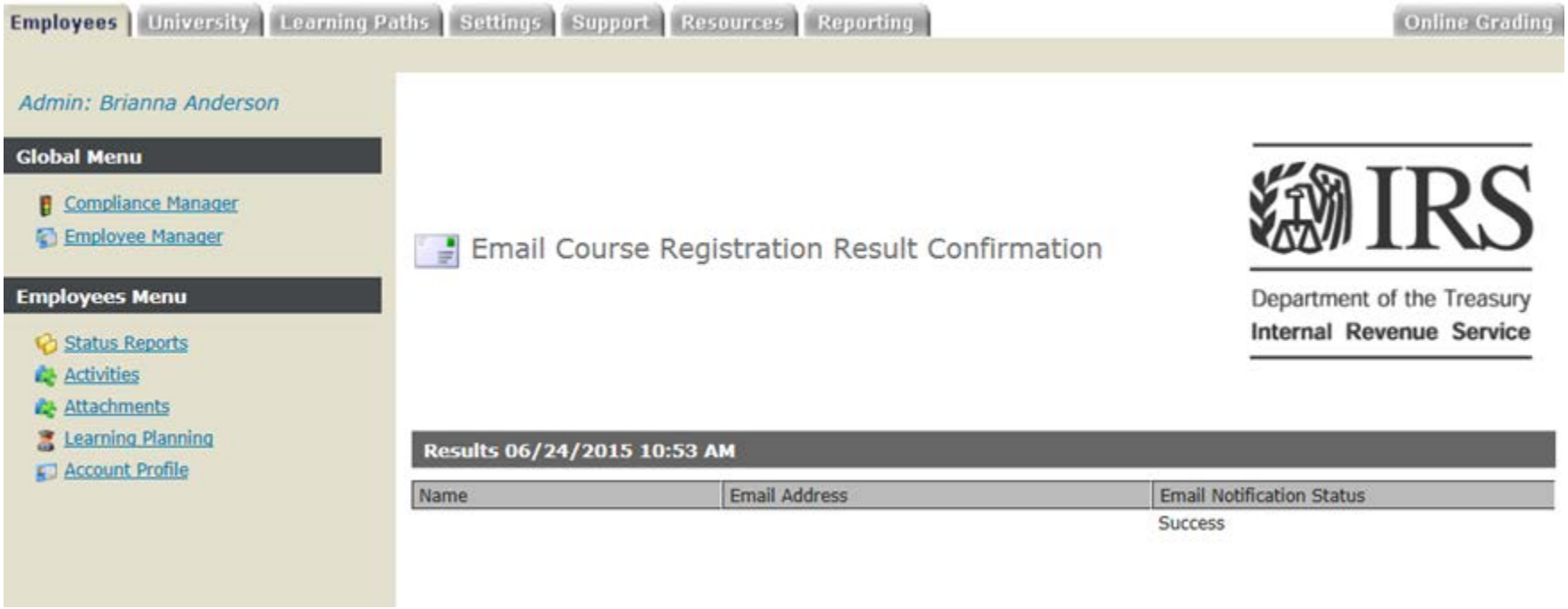
How to Approve an Individual Course Request



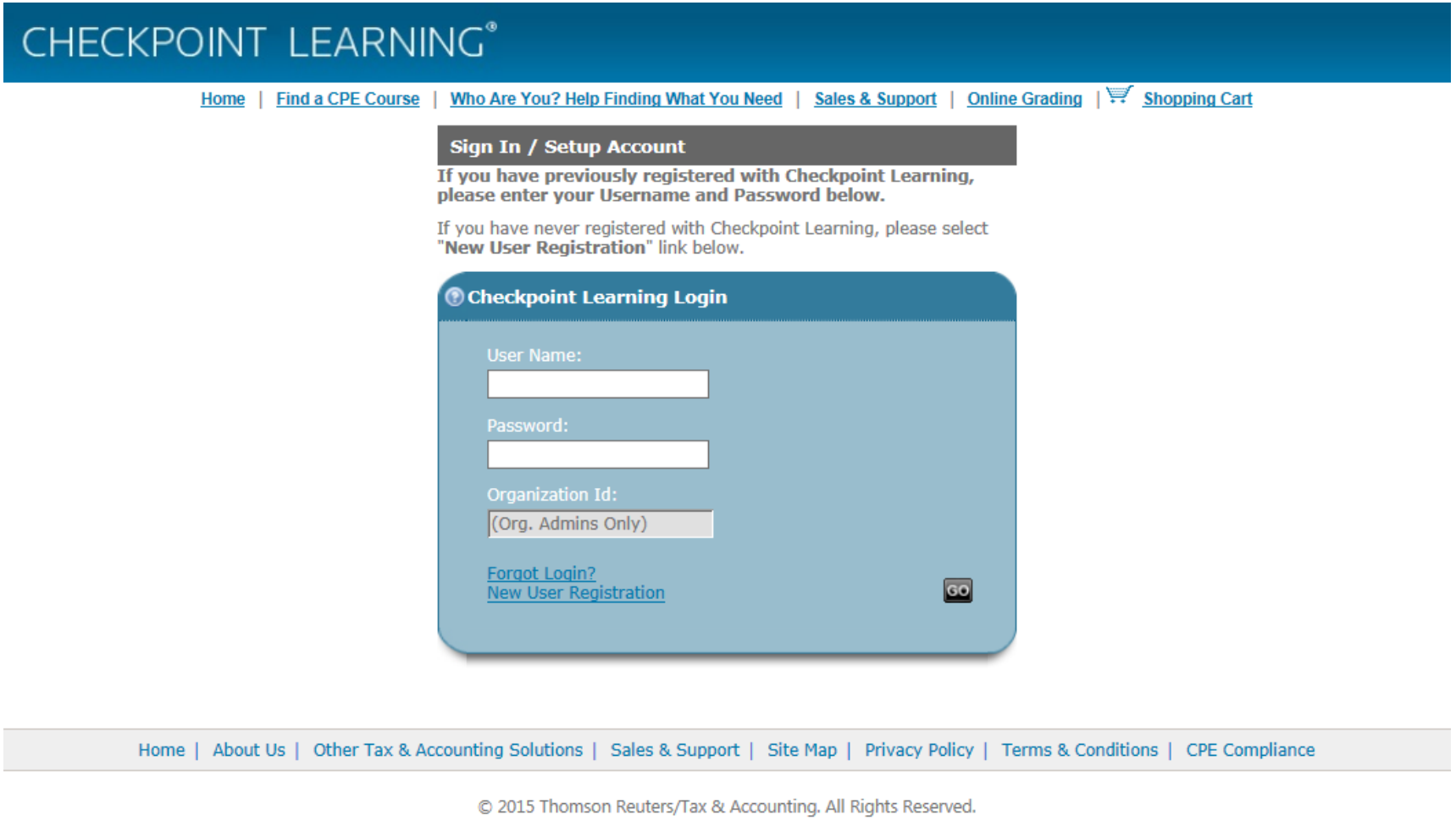
How to Approve an Individual Course Request



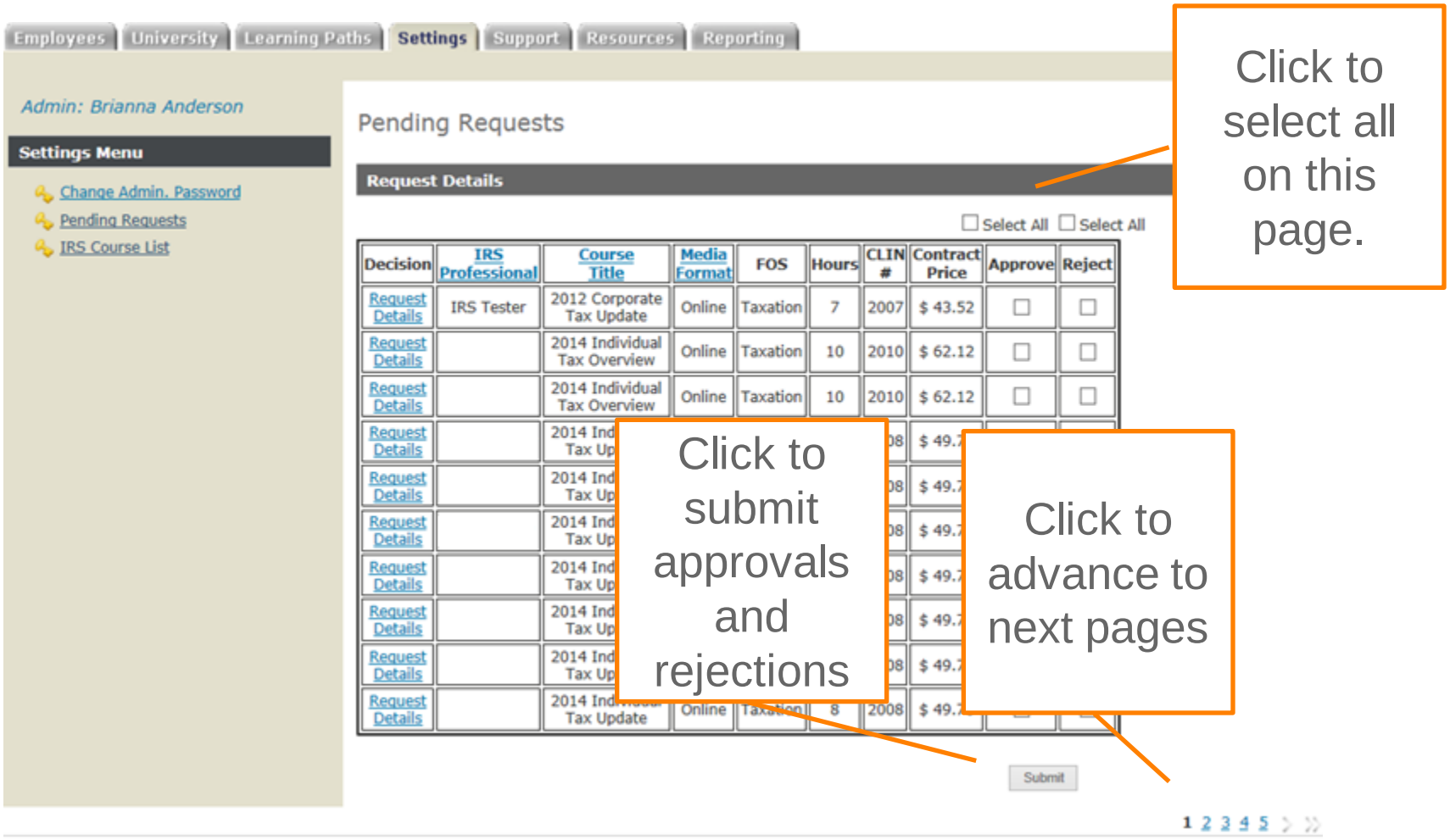
How to Approve an Individual Course Request



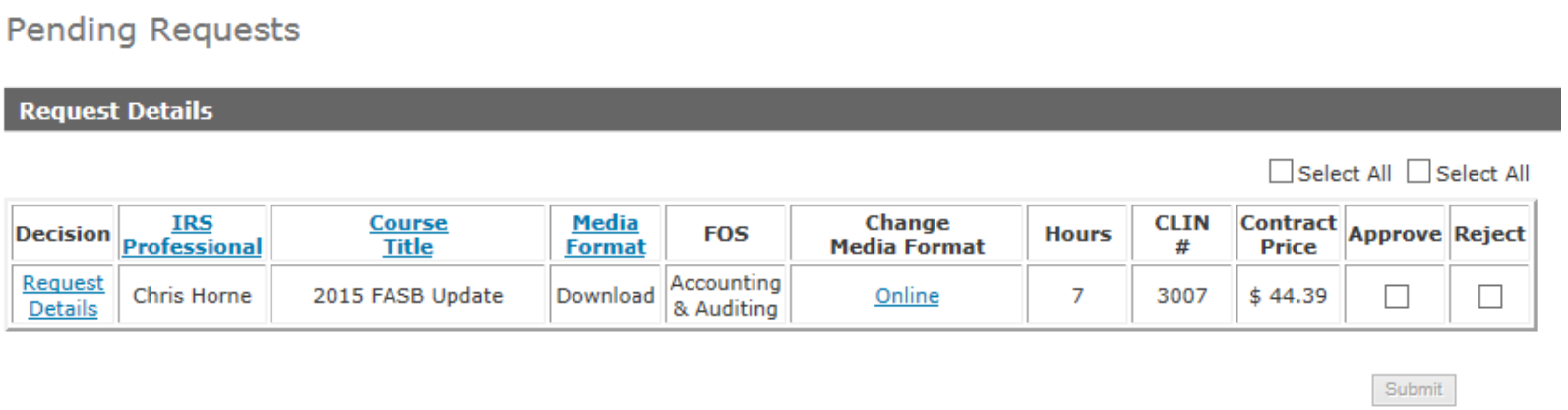
How to Approve Multiple/Bulk Course Requests



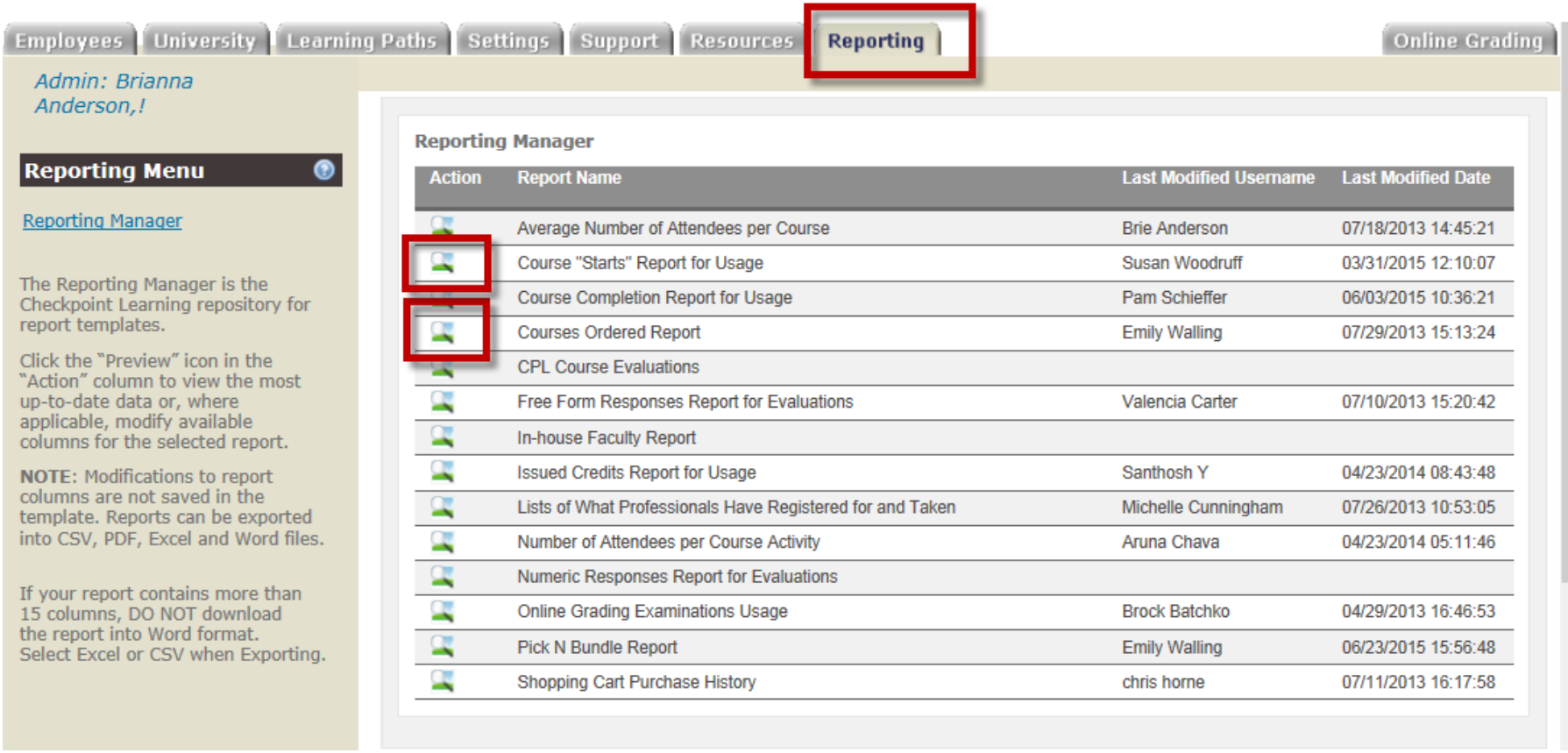
How to Approve Multiple Course Requests



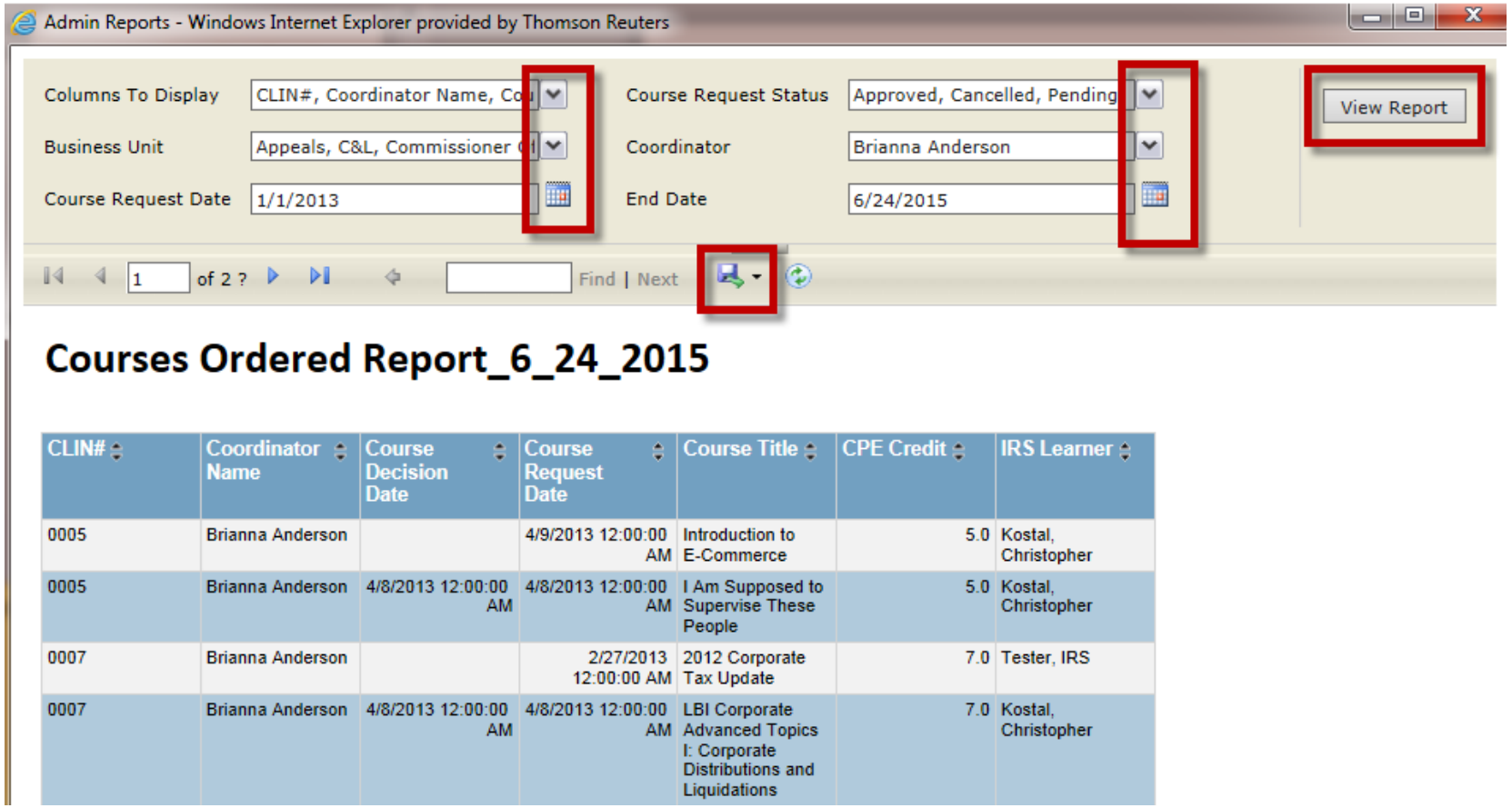
How to Change Course Media Format



How to Pull Reports



How to Pull Reports



Courses Ordered Report_6_24_2015

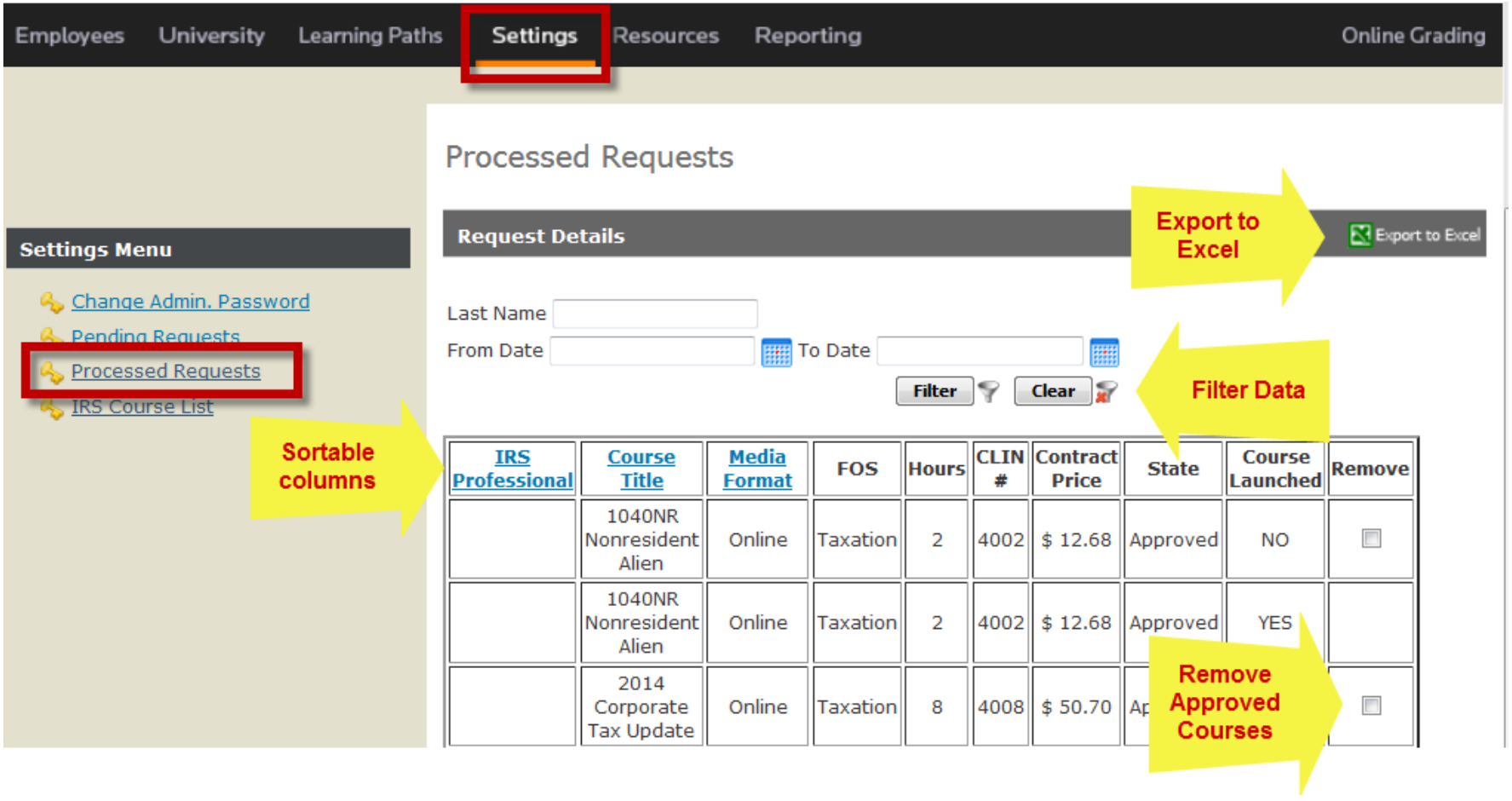
CLIN#	Coordinator Name	Course Decision Date	Course Request Date	Course Title	CPE Credit	IRS Learner
0005	Brianna Anderson		4/9/2013 12:00:00 AM	Introduction to E-Commerce	5.0	Kostal, Christopher
0005	Brianna Anderson	4/8/2013 12:00:00 AM	4/8/2013 12:00:00 AM	I Am Supposed to Supervise These People	5.0	Kostal, Christopher
0007	Brianna Anderson		2/27/2013 12:00:00 AM	2012 Corporate Tax Update	7.0	Tester, IRS
0007	Brianna Anderson	4/8/2013 12:00:00 AM	4/8/2013 12:00:00 AM	LBI Corporate Advanced Topics I: Corporate Distributions and Liquidations	7.0	Kostal, Christopher

New Features

The Processed Request feature is new for Checkpoint Learning Coordinator. It provides

- Ability to view, filter/sort, and export processed requests
- Ability to view approved courses launched by professionals
- Ability to remove a previously approved course request from a professional’s homeroom.

New Features



Support

Contact Thomson Reuters Technical Support assistance.

Dial - 1-800-431-9025 Option 9
checkpointlearning.productsupport@Thomsonreuters.com