

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

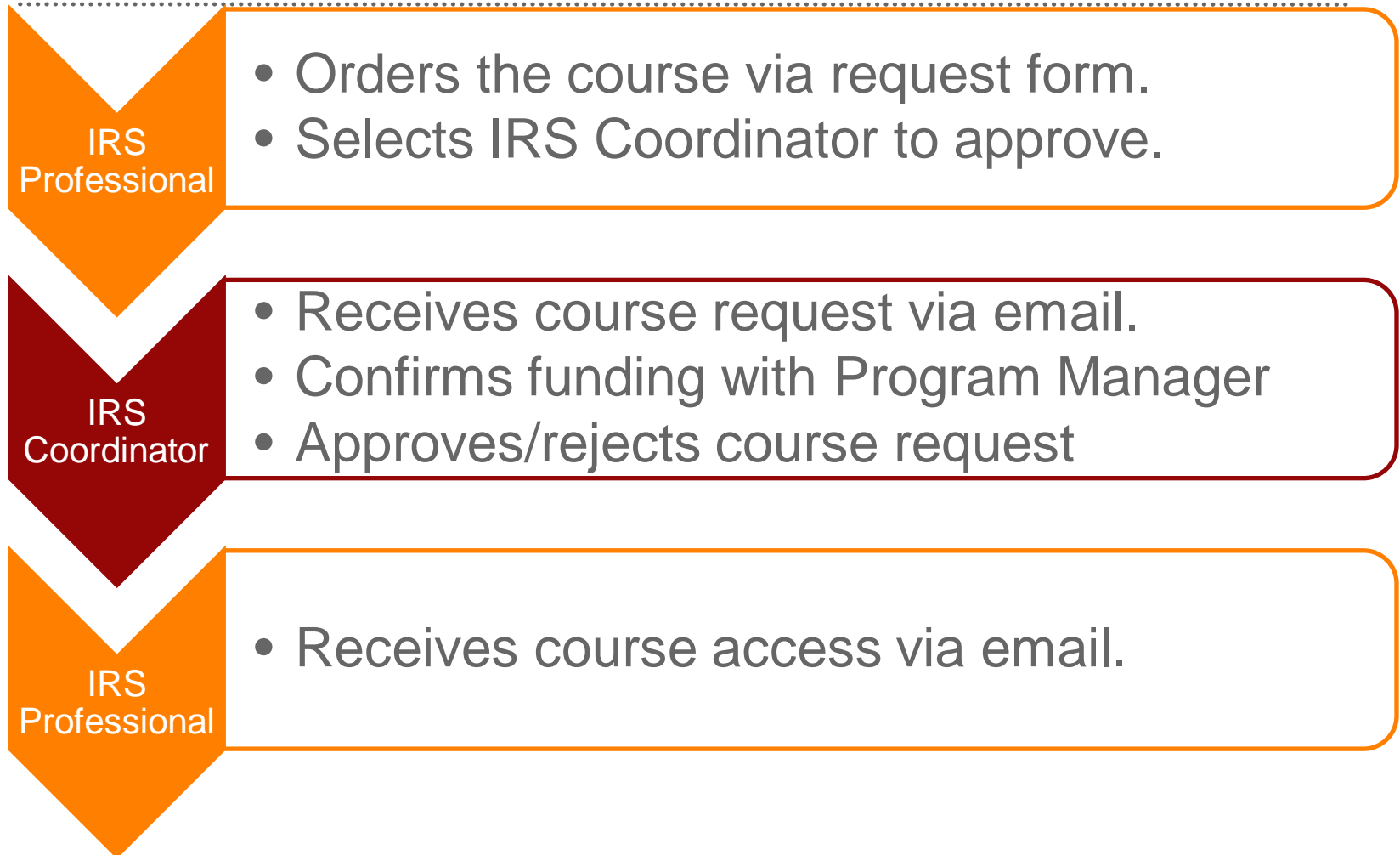
What is Checkpoint Learning?

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).

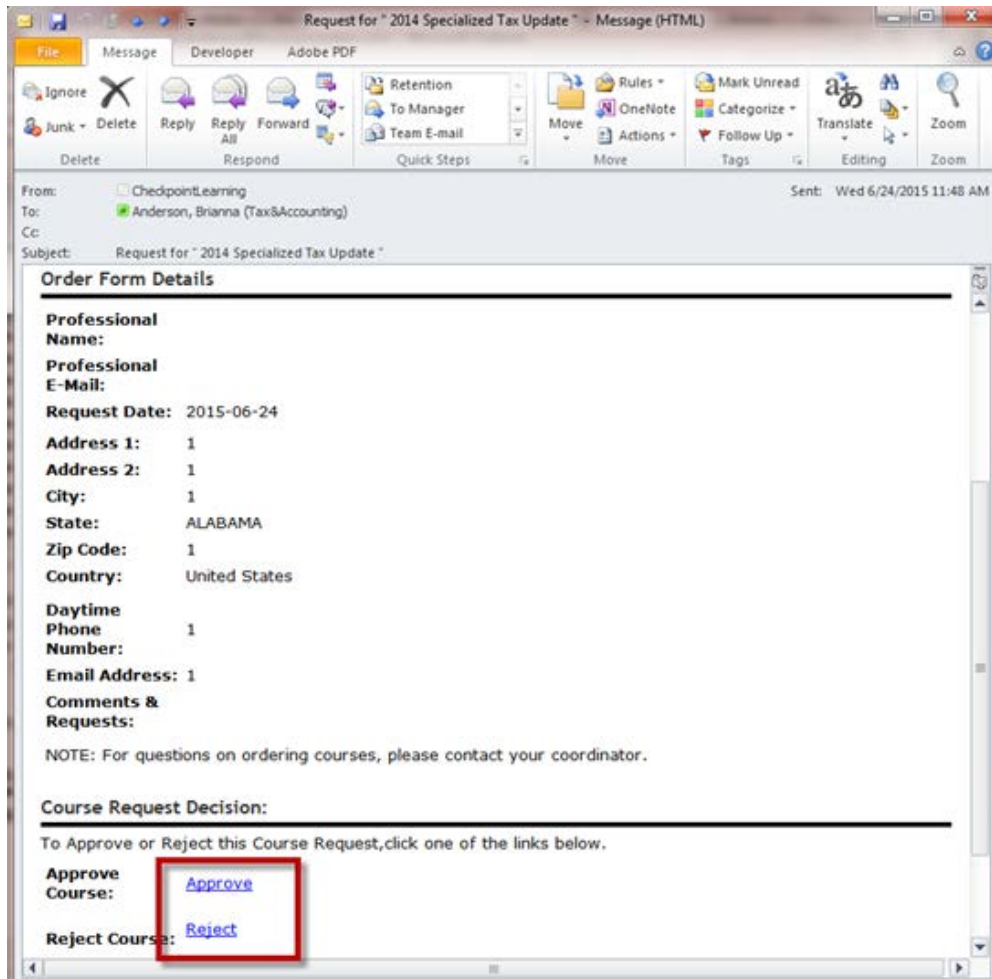
Each IRS professional has an end-user account. IRS Coordinators have two accounts, one as an end-user and one as the Coordinator.

Each account has it's own separate login.

What is the Process?



How to Approve an Individual Course Request



The screenshot shows an email window titled "Request for '2014 Specialized Tax Update' - Message (HTML)". The email header includes the sender "CheckpointLearning", the recipient "Anderson, Brianna (Tax&Accounting)", and the subject "Request for '2014 Specialized Tax Update'". The email body contains the following information:

Order Form Details

Professional Name:
Professional E-Mail:
Request Date: 2015-06-24
Address 1: 1
Address 2: 1
City: 1
State: ALABAMA
Zip Code: 1
Country: United States
Daytime Phone Number: 1
Email Address: 1

Comments & Requests:

NOTE: For questions on ordering courses, please contact your coordinator.

Course Request Decision:

To Approve or Reject this Course Request, click one of the links below.

Approve Course: [Approve](#)

Reject Course: [Reject](#)

How to Approve an Individual Course Request

CHECKPOINT LEARNING®

[Home](#) | [Find a CPE Course](#) | [Who Are You? Help Finding What You Need](#) | [Sales & Support](#) | [Online Grading](#) | [Shopping Cart](#)

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](#)



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How to Approve an Individual Course Request

Employees University Learning Paths Settings Support Resources Reporting Online Grading

Admin: Brianna Anderson


Global Menu

- Compliance Manager
- Employee Manager

Employees Menu

- Status Reports
- Activities
- Attachments
- Learning Planning
- Account Profile

Email Course Registration Result Confirmation



Department of the Treasury
Internal Revenue Service

Results 06/24/2015 10:53 AM

Name	Email Address	Email Notification Status
		Success

How to Approve Multiple/Bulk Course Requests

CHECKPOINT LEARNING®

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How to Approve Multiple Course Requests

Employees University Learning Paths **Settings** Support Resources Reporting

Admin: Brianna Anderson

Settings Menu

- Change Admin. Password
- Pending Requests
- IRS Course List

Pending Requests

Request Details

Select All Select All

Decision	IRS Professional	Course Title	Media Format	FOS	Hours	CLIN #	Contract Price	Approve	Reject
Request Details	IRS Tester	2012 Corporate Tax Update	Online	Taxation	7	2007	\$ 43.52	<input type="checkbox"/>	<input type="checkbox"/>
Request Details		2014 Individual Tax Overview	Online	Taxation	10	2010	\$ 62.12	<input type="checkbox"/>	<input type="checkbox"/>
Request Details		2014 Individual Tax Overview	Online	Taxation	10	2010	\$ 62.12	<input type="checkbox"/>	<input type="checkbox"/>
Request Details		2014 Ind Tax Up				08	\$ 49.7		
Request Details		2014 Ind Tax Up				08	\$ 49.7		
Request Details		2014 Ind Tax Up				08	\$ 49.7		
Request Details		2014 Ind Tax Up				08	\$ 49.7		
Request Details		2014 Ind Tax Up				08	\$ 49.7		
Request Details		2014 Ind Tax Up				08	\$ 49.7		
Request Details		2014 Ind Tax Update	Online	Taxation	8	2008	\$ 49.7		

Submit

1 2 3 4 5 > >>

Click to select all on this page.

Click to submit approvals and rejections

Click to advance to next pages

How to Change Course Media Format

Pending Requests

Request Details

Select All Select All

Decision	IRS Professional	Course Title	Media Format	FOS	Change Media Format	Hours	CLIN #	Contract Price	Approve	Reject
Request Details	Chris Horne	2015 FASB Update	Download	Accounting & Auditing	Online	7	3007	\$ 44.39	<input type="checkbox"/>	<input type="checkbox"/>

Submit

How to Pull Reports

Employees University Learning Paths Settings Support Resources **Reporting** Online Grading

Admin: Brianna Anderson,!

Reporting Menu

[Reporting Manager](#)















The Reporting Manager is the Checkpoint Learning repository for report templates.

Click the "Preview" icon in the "Action" column to view the most up-to-date data or, where applicable, modify available columns for the selected report.

NOTE: Modifications to report columns are not saved in the template. Reports can be exported into CSV, PDF, Excel and Word files.

If your report contains more than 15 columns, DO NOT download the report into Word format. Select Excel or CSV when Exporting.

Reporting Manager

Action	Report Name	Last Modified Username	Last Modified Date
	Average Number of Attendees per Course	Brie Anderson	07/18/2013 14:45:21
	Course "Starts" Report for Usage	Susan Woodruff	03/31/2015 12:10:07
	Course Completion Report for Usage	Pam Schieffer	06/03/2015 10:36:21
	Courses Ordered Report	Emily Walling	07/29/2013 15:13:24
	CPL Course Evaluations		
	Free Form Responses Report for Evaluations	Valencia Carter	07/10/2013 15:20:42
	In-house Faculty Report		
	Issued Credits Report for Usage	Santhosh Y	04/23/2014 08:43:48
	Lists of What Professionals Have Registered for and Taken	Michelle Cunningham	07/26/2013 10:53:05
	Number of Attendees per Course Activity	Aruna Chava	04/23/2014 05:11:46
	Numeric Responses Report for Evaluations		
	Online Grading Examinations Usage	Brock Batchko	04/29/2013 16:46:53
	Pick N Bundle Report	Emily Walling	06/23/2015 15:56:48
	Shopping Cart Purchase History	chris home	07/11/2013 16:17:58

How to Pull Reports

Admin Reports - Windows Internet Explorer provided by Thomson Reuters

Columns To Display: CLIN#, Coordinator Name, Course Request Status, Course Title, CPE Credit, IRS Learner

Business Unit: Appeals, C&L, Commissioner's Office

Course Request Date: 1/1/2013

Course Request Status: Approved, Cancelled, Pending

Coordinator: Brianna Anderson

End Date: 6/24/2015

View Report

1 of 2 ? Find | Next

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

Employees University Learning Paths **Settings** Resources Reporting Online Grading

Settings Menu

- Change Admin. Password
- Pending Requests
- Processed Requests**
- IRS Course List

Processed Requests

Request Details Export to Excel

Last Name

From Date To Date

Filter Clear

Sortable columns

IRS Professional	Course Title	Media Format	FOS	Hours	CLIN #	Contract Price	State	Course Launched	Remove
	1040NR Nonresident Alien	Online	Taxation	2	4002	\$ 12.68	Approved	NO	<input type="checkbox"/>
	1040NR Nonresident Alien	Online	Taxation	2	4002	\$ 12.68	Approved	YES	
	2014 Corporate Tax Update	Online	Taxation	8	4008	\$ 50.70	Ap		<input type="checkbox"/>

Export to Excel

Filter Data

Remove Approved Courses

Support

Contact Thomson Reuters Technical Support assistance.

Dial - 1-800-431-9025 Option 9

checkpointlearning.productsupport@Thomsonreuters.com