



Wolters Kluwer

When you have to be right



Tax & Accounting

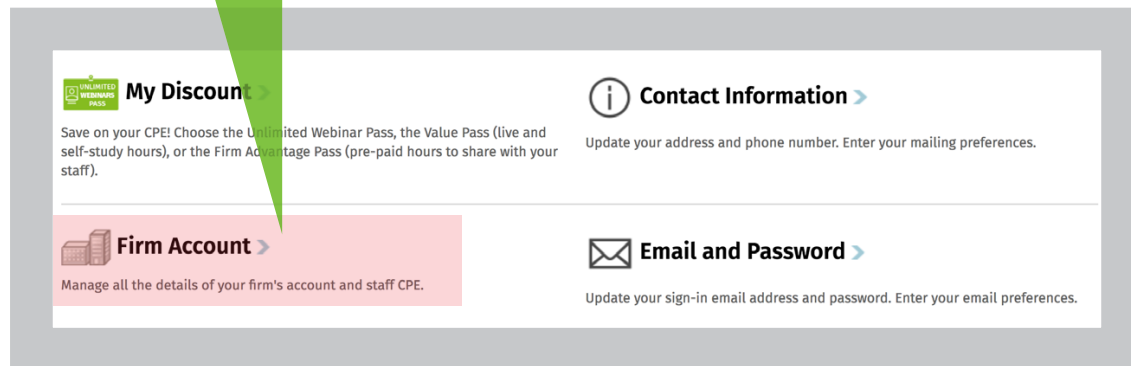
CCH[®] CPELink

FIRM ACCOUNT *Quick Start Guide*

SECTION 1: Setting up a Firm Account

CCH CPELink allows for firms to be set up by connecting users from the same organization under a firm account. If you are the administrator, follow these steps to set up an account.

First, log in to your account at CCHCPELink.com and click on Firm Account.



Enter the Firm Profile Information.

- Next to Account Administrator check the box for **“I’m the Account Administrator”**
- Check the box that says **“Use my personal address as the firm address”** to copy over information entered from the new user registration
- Click **Submit**

The screenshot shows the 'Firm Profile' form. It has a blue header with the title 'Firm Profile'. The form contains several fields:

- * Firm Name: Montague and Capulet, LLC
- Number of Professional Staff: 11 to 50
- ☒ Use my personal address as firm address (highlighted in a pink box)
- * Country: United States
- * Street Address: 1544 Main Street, Ste. 2B
- * City: Verona
- * State: Illinois
- * Zip Code: 60479
- * Phone: (800)344-3734
- Ext. (empty field)
- Enter numbers only (text below the phone field)

 At the bottom, there's a note: 'The assigned Account Administrator will have the ability to update the firm profile and add, delete, or update professional staff information and register others in the firm to CPE programs.' Below this, there's a row with 'Account Administrator' and a checked box next to 'I'm the Account Administrator'. At the very bottom, there are 'Submit' and 'Cancel' buttons.

On the following page, you will add the firm staff members that need to be set up with the Unlimited Firm Pass.

Enter email for individual and click Continue.

Add Professional Staff

We couldn't locate the new staff in our records. Please select an option below to proceed:

Email Address Lawrence.Friar@MontagueCapulet.com

- ☐ I'll create a user account for the staff
- ☐ Send an email to the staff so he/she can create an account

You will see a confirmation if the user already has an account

If user does not have an account, an account can be set up or an email can be sent to notify the staff member an account needs to be setup on CCH CPELink.

- Enter the **staff member's first and last name, confirm email address, and setup password for login** (this will need to be communicated to staff member)
- Once information is entered, hit **submit** and a welcome email from CCH CPELink will be sent to the staff member
- Continue this process for all staff members that need to be entered into CCH CPELink

Montague and Capulet, LLC Professional Staff

Add Professional Staff

We couldn't locate the new staff in our records. Please select an option below to proceed:

Email Address Gregory@MontagueCapulet.com

- ☒ I'll create a user account for the staff
- ☐ Send an email to the staff so he/she can create an account

Office Main Office

First Name Gregory

Middle Name or Initial

Last Name Sampson

Password

6 to 20 characters. Staff can change it later

Confirm Password

☒ Use Montague and Capulet, LLC's address

Country United States

Street Address 1544 Main Street, Ste. 2B

City Verona

State Illinois

Zip Code 60479

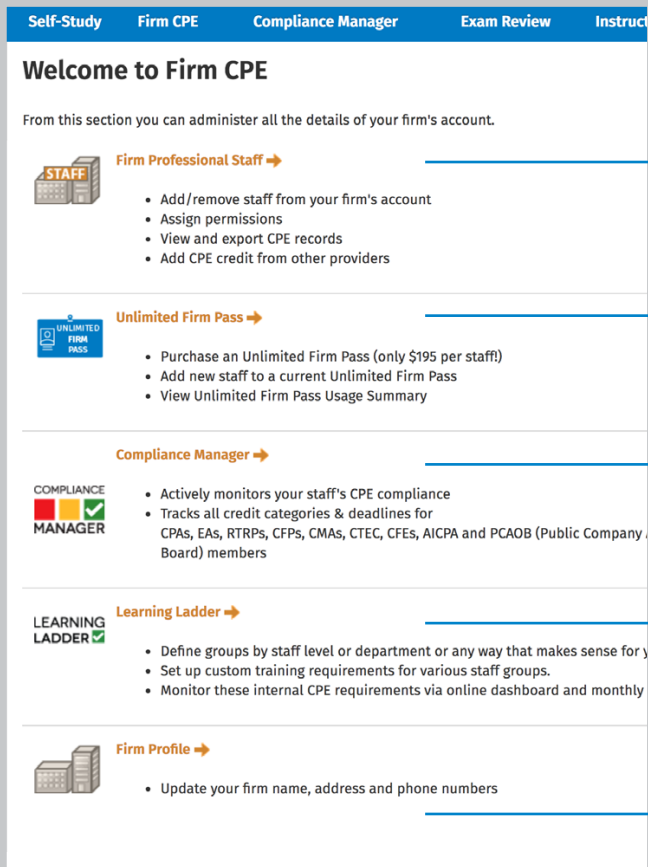
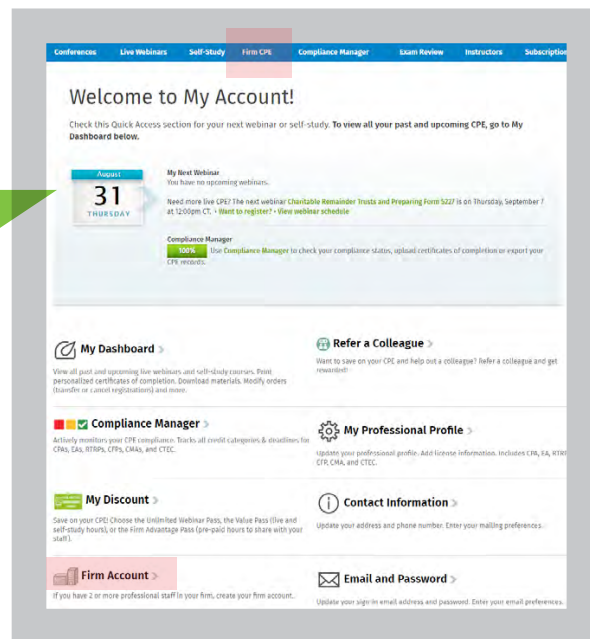
Phone (800)344-3734

Enter numbers only

Cancel Submit

SECTION 2: A Look Inside Your Firm's Account

Firm Administrators can access the firm's account by clicking on Firm Account from the My CPE page or Firm CPE from the top tab.



Manage Professional Staff

Purchase or assign Unlimited Firm Passes

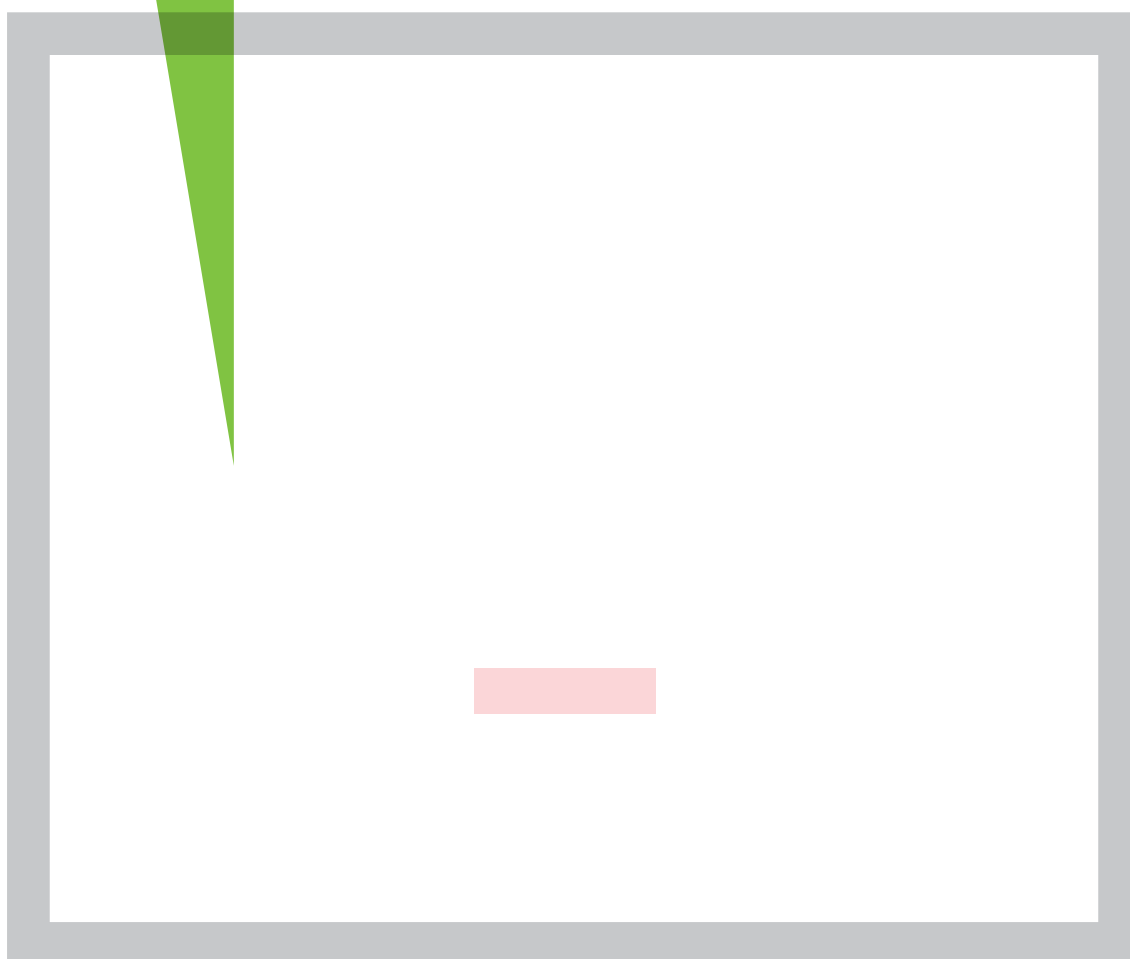
Monitor staff's CPE progress with Compliance Manager

Define specific learning regulators with Learning Ladder

Update the firm profile (address, name, phone number)

Firm Professional Staff

Firm Professional Staff is where the administrator can add and remove staff by clicking on Add Staff to enter the staff's information or Remove next to the staff member's name to remove that staff's account from the firm's account



- Administrators can also select the **role** for staff members as an **Administrator** (Manage staff and firm, register staff to course), **Assistant** (Register staff to courses), or **Staff** (No rights)

Unlimited Firm Pass

Unlimited Firm Pass is where administrators can purchase a subscription for staff members to have unlimited access to self-study and live webinar courses for one year.

Self-Study Firm CPE Compliance Manager Exam Review Instr

CCH CPELink Firm Unlimited Firm Pass

Subscription Details

Your subscription will be automatically renewed on 2/7/2018

Payment History: February 7, 2017 ▼ [Print Receipt](#)

Unlimited Firm Pass Usage Summary	Self-Study Hours
Janaye Test	9
John Smith	0
George Washington	0

Summary of pass usage will be listed from the Unlimited Firm Pass option

- Minimum of 5 passes purchased initially at \$195 per pass (individual passes can be purchased after the initial 5)
- Subscription is valid one year from purchase date
- UFP fees are refundable within 30 days of purchase as long as pass was not used by user

Compliance Manager

Compliance Manager allows the firm administrator to view and actively monitor the staff's progress on CPE for that reporting period.

Compliance Manager

The list below contains all the professional staff currently linked to your firm account. As Account Administrator, you are also included in the list. The credit hours required, earned, and needed are listed for each staff person. To add more staff, click on the "Add Staff" button. To view the CPE details for a specific staff person, click on the staff name.

STAFF	REGULATOR	PROGRESS ▾	CPE CREDIT			CPE DEADLINE
			REQUIRED	EARNED	DEFICIT	
Benvolio Montague	Illinois	100%	0	0	0	9/30/2018
Lawrence Friar	Illinois	100%	0	0	0	9/30/2018
Juliet Capulet	Illinois	100%	0	0	0	9/30/2018
Romeo Montague	Alabama	100%	0	0	0	9/30/2017
Gregory Sampson	Georgia	100%	0	0	0	12/31/2017

[+ Add Staff](#)

Note: State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. CCH CPELink does not guarantee the accuracy of these CPE tracking rules and may not be held liable for any damages as a result of any reliance upon it.

- Compliance Manager lists the staff member's name, regulator, progress, required CPE, CPE earned, deficit and CPE deadline
- Clicking on a staff member's name will take the administrator to that individual's Compliance Manager

Learning Ladder

Learning Ladder allows administrators to define custom regulators for staff members' CPE

Learning Ladder

The list below contains the professional staff added to the selected staff group. The credit hours required, earned, and needed are listed for each staff. To add more staff groups, edit existing ones, or to add more staff to a group, click on the "Manage Staff Groups" button.

To view the CPE details for a specific staff person, click on the staff name.

Staff Group: New Hire Training Rules: CPE Credit [Manage Staff Groups](#)

PROGRESS	STAFF	CPE CREDIT			DEADLINE
		REQUIRED	EARNED	DEFICIT	
0%	Lawrence Friar	10	0	10	12/31/2017
0%	Juliet Capulet	10	0	10	12/31/2017
0%	Romeo Montague	10	0	10	12/31/2017
0%	Gregory Sampson	10	0	10	12/31/2017

- Learning Ladder is typically used for any “in-house” requirements a firm may have for staff members (example: new hires, tax managers, partner requirements, etc.)
- To create a training rule, the administrator will click on Manage Staff Groups and follow the instructions to setup the appropriate training rule for staff members

Firm Profile

Firm Profile is where administrators can update the name of the firm, address, and phone numbers

- If there are multiple offices, the administrator can click on **+Add** to include more offices
- Required fields are listed with an *

Firm Profile

* Firm Name

Number of Professional Staff

☐ Use my personal address as firm address

* Country

* Street Address

* City

* State

* Zip Code

* Phone

Ext.

Enter numbers only

The assigned Account Administrator will have the ability to update the firm profile and add, delete, or update professional staff information and register others in the firm to CPE programs.

Account Administrator ☒ I'm the Account Administrator

[Submit](#) [Cancel](#)

Contact information:
Wolters Kluwer
2700 Lake Cook Road
Riverwoods, IL 60015
United States
800-344-3734

Please call **800-344-3734** or
visit **www.CCHCPELink.com**
for more information.

