



Tax & Accounting

**CCH<sup>®</sup> 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.

The screenshot shows a dashboard with four main navigation options:

- My Discount >**: Save on your CPE! Choose the Unlimited Webinar Pass, the Value Pass (live and self-study hours), or the Firm Advantage Pass (pre-paid hours to share with your staff).
- Contact Information >**: Update your address and phone number. Enter your mailing preferences.
- Firm Account >**: Manage all the details of your firm's account and staff CPE. (This option is highlighted in a pink box with a callout arrow pointing to the text above.)
- Email and Password >**: Update your sign-in email address and password. Enter your email preferences.

### 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 with the following fields and values:

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

At the bottom, there is a checkbox for 'Account Administrator' which is checked, and a checkbox for 'I'm the Account Administrator' which is also checked. Below these are 'Submit' and 'Cancel' buttons.

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.

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.

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

### Add Professional Staff

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

Email Address

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

I'll create a user account for the staff

Send an email to the staff so he/she can create an account

Office

First Name

Middle Name or Initial

Last Name

Password   
6 to 20 characters. Staff can change it later

Confirm Password

Use Montague and Capulet, LLC's address

Country

Street Address

City

State

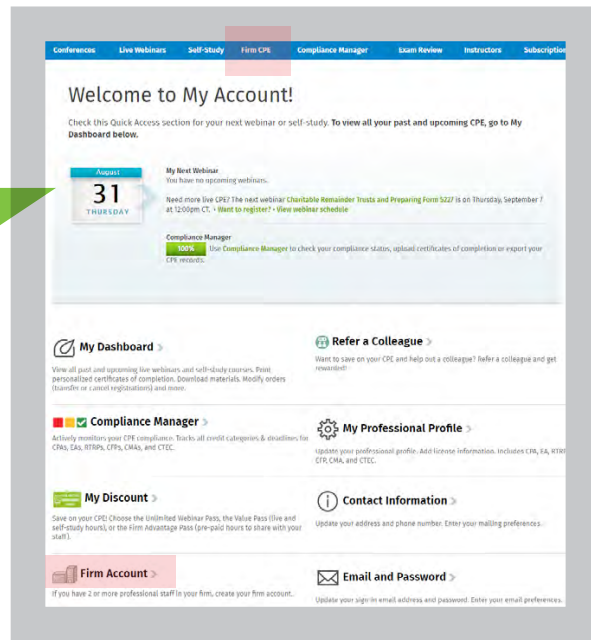
Zip Code

Phone

Enter numbers only

## 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.



Self-Study Firm CPE Compliance Manager Exam Review Instruct

### Welcome to Firm CPE

From this section you can administer all the details of your firm's account.



#### Firm Professional Staff →

- Add/remove staff from your firm's account
- Assign permissions
- View and export CPE records
- Add CPE credit from other providers

Manage Professional Staff



#### Unlimited Firm Pass →

- Purchase an Unlimited Firm Pass (only \$195 per staff!)
- Add new staff to a current Unlimited Firm Pass
- View Unlimited Firm Pass Usage Summary

Purchase or assign Unlimited Firm Passes



#### Compliance Manager →

- Actively monitors your staff's CPE compliance
- Tracks all credit categories & deadlines for CPAs, EAs, RTRPs, CFPs, CMAs, CTEC, CFES, AICPA and PCAOB (Public Company Board) members

Monitor staff's CPE progress with Compliance Manager



#### Learning Ladder →

- Define groups by staff level or department or any way that makes sense for you
- Set up custom training requirements for various staff groups.
- Monitor these internal CPE requirements via online dashboard and monthly

Define specific learning regulators with Learning Ladder



#### Firm Profile →

- Update your firm name, address and phone numbers

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

### Montague and Capulet, LLC Professional Staff

The list below contains all the professional staff linked to your firm. As Account Administrator, you are also included in the list.

- To add staff, click the "Add Staff" button and simply enter the email address of each staff member you would like to include.
- To remove staff, click on their name and then click "Remove." This person's records will no longer be linked to your firm account.
- If you would like staff to be able to register other staff members for CPE, select the staff and then click the staff's role to make changes.
- To view CPE records for individual staff, click on their name and then click "View CPE Records.". Here you can also add courses taken from other CPE providers.

Staff	Search...
 Benvolio Montague	
 Gregory Sampson	
 Juliet Capulet <span style="float: right;">Remove</span>	
▶ CPE Activity    ▶ CPE Compliance    ▶ Role: Staff	
 Lawrence Friar	
 Romeo Montague	

Export CPE Records
+ Add Staff

- 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.

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	
<a href="#">Benvolio Montague</a>	Illinois	100%	0	0	0	9/30/2018
<a href="#">Lawrence Friar</a>	Illinois	100%	0	0	0	9/30/2018
<a href="#">Juliet Capulet</a>	Illinois	100%	0	0	0	9/30/2018
<a href="#">Romeo Montague</a>	Alabama	100%	0	0	0	9/30/2017
<a href="#">Gregory Sampson</a>	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%	<a href="#">Lawrence Friar</a>	10	0	10	12/31/2017
0%	<a href="#">Juliet Capulet</a>	10	0	10	12/31/2017
0%	<a href="#">Romeo Montague</a>	10	0	10	12/31/2017
0%	<a href="#">Gregory Sampson</a>	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

**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](#)

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



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Please call **800-344-3734** or  
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