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Accessing CCH® CPELink
To access the CCH CPE Link enter **www.cchcpelink.com** in any web browser. If you do not have an account, simply click on “My Account,” found in the upper right-hand corner and click on the “Register New User” button.
Registering as a new user
First time users will be prompted to register as a New User. Simply click the green “Register New User,” button.
Completing the New User Registration profile

New users must complete the New User Registration form shown below. The following fields are required by the system:

- First Name
- Last Name
- Country
- Street Address
- City
- State
- Zip Code
- Email Address
- Confirm Email Address
- Password
- Confirm Password

Upon completion of the New User Registration Form the user should select the blue “Submit” button. The user is now logged in to the CCH CPELink.

Please note: your Mobile number may be required for multi-factor authentication in the event CCH CPELink’s emails are not coming to your inbox.
Returning users
Returning users must re-enter their email and password into the system. Then click the blue “Sign In,” button. The user is now logged in to the CCH CPELink.

Completing the Professional Profile
To ensure the proper recording of continuing professional education credits taken, the user must complete the “Professional Profile.” To complete the Professional Profile, select the “My Account” drop-down at the top right of the CCH CPELink Center home page, and then select “My Professional Profile.”

The user will be brought to the screen below, and should enter all relevant license information. Once all relevant information is completed, the user should select the green “Update,” button.
**IMPORTANT:** It is critical for users to keep their license information up to date. License information is required for Compliance Manager to accurately calculate the users' CPE Compliance status and ensure the proper reporting of CPE completion when required by certain regulators.

*If you are an Enrolled Agent, OTRP, RTRP, CTEC Registered Tax Preparer or Certified Financial Planner, you’re license information is required to be included in Wolters Kluwer’s weekly updates to those regulators.*

![My Profile](image)

**IMPORTANT:** Keep your license information up to date. License information is required for Compliance Manager to accurately calculate your CPE compliance status and so that CCH CPELink can report your CPE hours when required by certain regulators.

**CPA Licenses**

- **State:** Illinois
- **License Number:** 78965412
- **Initial License Date:** 04/06/2012

**Additional Licenses**

- IRS - Enrolled Agent
- Certified Financial Planner
- CTEC Registered Tax Preparer
- IRS - Other Tax Return Preparer
- IMA - Institute of CMAs
- Yellow Book
- AICPA
- ACPE
- PCAOB
- IIA - Certified Internal Auditor

After updating the Professional Profile, the user will return to the My Account page.
Creating a Firm Account
Firms can manage all associated users from the “Firm CPE” page – from adding staff & registering them for events, to updating compliance status. To create a Firm Account simply click on the Firm CPE Center, and follow the simple process to create a Firm Account.

Create a Firm Profile
When you create a firm profile, you assign account administrators to oversee your professional staff’s training. Your administrators can register staff for live webcasts and courses. Administrators can also add external CPE records, and upload and store certificates of completion.

To begin, complete the Firm Profile and designate an Account Administrator. If you are the Account Administrator, simply check the “I’m the Account Administrator” checkbox on the Firm Profile form. Otherwise, enter the Name and Email address of the Account Administrator on the Firm Profile form.
Firm Profile

* Firm Name

Number of Professional Staff --

☐ Use my personal address as firm address

* Country United States

* 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 the professional staff information and register others in the firm to CPE programs.

Account Administrator ☐ I’m the Account Administrator

Name

Email

Submit Cancel

* Required Fields
Editing the Firm Profile
If you need to update the firm name, address or phone number – return to the Firm CPE page, and select “Firm Profile”.

Add Professional Staff to the Firm Account
Now that you have created a Firm Account you can add Professional Staff to the Account. Click on the “Add Staff” button on the lower right of the page and enter the staff’s email address and the system will allow you to create a user account for them, or request an email be sent to the staff, prompting them to create their own account on CCH CPELink.

NOTE: If you create the user account for the staff, be sure to share their password with them!

*If you are a member of BDO Alliance or Gartner, you may need to go through those portals to make any additions/removals of staff.
Add Professional Staff

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

Email Address: walterdemotest@wolterskluwer.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:

Middle Name or Initial:

Last Name:

Password:
6 to 20 characters. Staff can change it later

Confirm Password:

Use Demo Firm 2 Ltd's address

Country: United States

Street Address: 742 Evergreen Terrace

City: Springfield

State: Oregon

Zip Code: 97477

Phone:
Enter numbers only

Submit

Cancel
If you ask the staff to create their own account in the CCH CPELink, they will receive an email similar to the one below.

```
From: CPE Link [mailto:customerservice@cpeLINK.com]
Sent: Monday, January 06, 2017 2:52 PM
To: Tylman, Jason
Subject: Confirmation of Firm XYZ

CPE Link
now a part of Wolters Kluwer

Wendy Becker has listed you as part of “XYZ.”

In order to be linked to this firm, you must **sign in** to your account. If you are a first time attendee with CPE Link, you must **register as a new user**.

For FAQ, live chat, and access to customer service, go to: www.cpeLINK.com/help
customerservice@cpeLINK.com | (800) 616-3622
```

When you are done adding Professional Staff, simply click the “Done” button to continue.
Updating Staff Permission Levels

Access the Firm CPE > Firm Professional Staff area. To give Administrative access to additional staff members, click on the Staff Member’s name and then on the “Role” designation. There are three levels of access:

**Administrator**: Can add/remove new staff members as well as assign/register webinars and self-study content. Can oversee Compliance Manager for the staff.

**Assistant**: Can assign/register staff to webinars or self-study content.

**Staff**: Can access the system and take courses as the subscription or administrator allows.

To grant admin rights to a staff member, select the option and click the Submit button.
Removing Staff from the Firm Account

To remove staff from the firm account, simply click on the user’s name on the Firm Account page and click “Remove”.*

*If you are a member of BDO Alliance or Gartner, you may need to go through those portals to make any additions/removals of staff.
**Live Webinars**
Live Webinars qualify for CPE credit, and are hosted on CCH CPELink.

**Registering a Group for a Webinar – Firm Pass subscription**
Firm Administrators can register their Staff for a Webinar, by clicking on the course title and accessing the course information.

Scroll towards the bottom of the page and select “Group” radio button, update the Group size and click “Add to Cart.”

Next, select the “Group” option; use the drop-down to pick the number of attendees and click “Add to Cart.”
In the shopping cart, click on the “Select Group Attendee” option underneath the course title. **IF ATTENDEES ARE NOT SELECTED, THE SHOPPING CART WILL NOT ZERO-OUT THE COST.** By selecting the attendees, CCH CPELink will know who does and does not have a Firm Pass and whether your firm needs to be charged for any additional attendees that don’t have a firm pass.*

*If a member of your staff requires a Firm Pass, please contact your Sales Rep.

Click on the “Select Group Attendee” option to choose from a list of your Professional Staff.
If all the attendees have valid Firm Passes, the cost will zero-out and you can click on, “Proceed to Checkout.”
Select the staff member to be the main contact for this webinar (if it won’t be you). This individual will be the person logging in to access the webinar for the group. Click “Proceed to Checkout.”

On the next page, click “Place Order” to finalize the registration.
Registration Confirmation

After successfully registering, there will be an Order Confirmation with instructions on how to access the webinar:

The main contact and Firm Administrators will also receive an email confirmation following successful registration to a Webinar. The user can add the webinar to their calendar by clicking “Add to Calendar” in the email.
Attending a Webinar
User should plan on joining a Webinar 15 minutes before the indicated start time.

To attend a Webinar, users should go to www.cchcpelink.com, sign in with their email address and password, and click “My Account” and then select “My Dashboard.” On the My Dashboard page click the “Join Webcast” link to join the Webinar.

Submitting Attendance and Issuing Webinar Certificates
The Firm Administrator or main contact for the webinar can submit attendance through the “Group Attendance Form” link in the My Account > My Dashboard section.
In the “Group Attendance Form” they can add and update users that attended and click “Submit.” An email will go to each participant asking them to log in and confirm they attended. Participants will then be able to access their certificates under the My Account > My Dashboard area.

Accessing Webinar Certificates
Upon the webinar’s conclusion, a participant can access their certificate through the My Account > My Dashboard section under the name of the course (this may be in the “Past” tab).
Webinar System Requirements
Adobe Connect is the webcast platform used. User having issues accessing the webinar can test their system requirements by going to Help > Wecast System Requirements > Test Your System. This diagnostic test will let the user know if their connection speed is appropriate, and whether the operating system and browser are compatible.

Supported System Configurations
Webcasts
- Windows 7+ (Microsoft Edge, Latest Internet Explorer, Firefox, or Chrome)
- Apple Mac OS 10.10+ (Latest Firefox, Safari, or Chrome)
- Android 6.x (Chrome Browser Only)
- Apple iOS ("Latest version, Safari Browser Only")

*Official support for the "latest" version of a newly released browser, among those noted above, will be added within 8 weeks of public release. Until then, the previous version will continue to be supported instead.

If you are using an unsupported version of a Windows, Mac, or Linux operating system, you may experience difficulty in viewing and/or listening to the event.
On Demand/Self-Study Courses
Self-Study courses can be taken any time and accessed through the “My Dashboard” section of the User’s account.

Registering Multiple Users for a Self-Study Course
Firm Administrators can register multiple Users for a self-study course at www.cchcpelink.com, by clicking a course title or the shopping cart icon to the right of the course under the Self-Study section.

Next, select the drop-down under the “Registration Options”; use the drop-down to pick the number of attendees and click “Add to Cart.”
Managing Subscriptions
Depending on the type of subscription your firm has there are different ways to check on and limit usage and access.

Bulk Hour Subscriptions – Usage
To check on the hours go to: Firm CPE > Premium Bulk Hours*

In the status box, you’ll see the Total Available Hours listed. This will tell you how many hours you have available until the end of your subscription period.

The “View Usage Summary” button will display the hours that were used and by which staff.

Please note hours expire a year after purchase.
Bulk Hour Subscriptions – Allocate Hours

Those with Administrative access will have the ability to decide how the bulk hours in your subscription are utilized by your staff. The Bulk Hours Status area can be accessed at: Firm CPE > (Premium or Self-Study) Bulk Hours from the toolbar. One option is to set the status of the bulk hours to: “Firm Administrator controls access.” From here, the ability to control how many hours your staff are allowed to register themselves for content is available.

To update the hours, the admin will need hours themselves to give out. If you are not the Delegated Firm Administrator, they will have to give you hours to mete out to staff.

Enter a number in the box to the right of the Staff member’s name (or to multiple staff members) and click on the “Update” button on the bottom of the screen.

TIP: When the “Enable open access to all firm staff” option is selected anyone with an account connected to your firm will be able to take any course included in the subscription. It’s a good idea to remove staff when they are no longer with your firm to avoid this.
**Firm Pass Subscriptions – Usage**

To check Firm Pass usage go to: [Firm CPE > Unlimited Firm Pass](#)

A list of staff who have firm passes will be here with the hours of webinar or self-study content they have taken.

![Demo Firm 6 - Firm Package Firm Packages](image)

**Firm Pass Subscriptions – Assigning Available Firm Passes**

Typically, when the account for the firm is created, you’ll be asked for a list of staff members and Wolters Kluwer will take care of setting up the accounts for your staff and assigning firm passes. If there wasn’t a full list or you’ve ordered additional passes through your Sales Rep, you may have additional passes to assign.

Please Note: An account and a subscription (firm pass) are two separate things. If an account is created, a firm pass will need to be added to it.

Navigate to: [Firm CPE > Unlimited Firm Pass](#) in the **Subscription Details** box, there will be a status of how many firm passes are available to assign. Click on the “Assign to Staff” link and select the user from the list of available staff. The user’s account will have to be created prior to assigning the firm pass.

![Demo Firm 6 - Firm Package Firm Packages](image)
Learning Ladders

Learning Ladders can be used to set CPE Requirements specifically for the staff of your Organization using a similar structure as other Boards of Accountancy use. A Learning Ladder is structured by creating a “Staff Group” that allows you to build “Rules” that contain a required amount of CPE to be completed for a specific Subject Area (based on NASBA’s suggested Subject Areas). Customized Subject Areas can be created as well.

In addition to monitoring your Staff’s Learning Ladders within the “Learning Ladders” area, an Admin can also view the progress in Compliance Manager (for those staff members who have their license information updated in their profile).

Creating a Learning Ladder:
*Please note, prior to getting started Users accessing the Learning Ladder feature need to have Admin rights. These can be set up in the Firm CPE > Firm Professional Staff area by the Firm’s Super Admin.

1. Navigate to Firm CPE > Learning Ladder
2. Start by creating a Staff Group with:
   a. Group Name – this will be the name of the Learning Ladder (ex. New Hires)
   b. Training Cycle – selecting whether the Learning Ladder will be an annual, biennial or triennial requirement for staff members
   c. Cycle Start – when the Learning Ladder will start: January 2st or the Staff Start Date. If left unselected (this is an optional item)
3. Once these have been selected, click the “Continue” button
4. Start creating the ladder by designing rules for the Learning Ladder. These will be the learning requirements based on course Subject Areas that have been defined by the firm. Please note: Learning Ladders do NOT allow for assigning individual courses. Learning Ladders allow for an Organization to mimic and customize regulatory requirements similar to the way State Boards set their CPE requirements.
   a. Rule Name: This will be representative of the goal of the requirement. Example: “Tax Courses”
b. **Type:** select whether there is a minimum or maximum number of allowed CPE for this Rule.

c. **Credit:** The amount of credits required.

d. **Method:** Determination of whether the credits need to come from either Live (this includes Webinars) or Self-Study courses. “All” will designate either modality.

e. **Subject Area:** One of the pre-set NASBA approved fields of study or **one can be customized based on the Organization’s needs.**

f. **Level:** Specify whether the courses meeting this requirement need to be at a certain level of program knowledge.

5. Click the “Add Rule” button

6. Repeat steps 4 and 5 as necessary to complete the Learning Ladder requirements. The individual rules can be as simple or complex as required but it may be beneficial to simplify by limiting 1 rule per Subject Area.

Click the “Done” link when you are finished creating Rules.
7. Select the Staff you'd like to register for the Learning Ladder and click the “Save” button.

![Manage Staff](image1)

8. When completed the “Manage Staff Group” page will be available. If changes or updates are necessary, this area is where the Learning Ladder can be updated.

The "Add Staff Group" link can be used to make additional Learning Ladders.

![Learning Ladder - Manage Staff Groups](image2)
Creating Customized Subject Areas
Generally the NASBA Subject Areas are best to use when deciding what requirements the organization wants to set for staff. There is, however, additional functionality to update and create custom subject areas that may be utilized by your staff.

1. Navigate to Firm CPE > Learning Ladder and start by adding a new Staff Group or Editing an existing Learning Ladder by clicking on the “Manage Staff Groups” button:

2. Create/Edit a “Training Rule” and use the drop-down on the Subject Area field to select “Other” – this will open the field and the customized subject area can be entered. Click the “Add Rule” button when finished.

3. When the customized topic has been added to the rule(s) – it will be available as an option to assign when utilizing the “Add Course” function to track external training.
Monitoring Learning Ladders

To access Staff Progress of Learning Ladders, Navigate to Firm CPE > Learning Ladders. The Drop-down under the “Training Rules” will allow for toggling between the separate requirements in the Learning Ladder.

Progress can also be checked for those Staff members who have updated their License information for other regulators in the “My Account > My Professional Profile” in Compliance Manager.
APPENDIX

Adding an External Course to Compliance Manager/Learning Ladder

*Please Note: this process assumes the user has Administrative rights in CCH CPELink and that license information has been entered for the staff.

1. Navigate to “Compliance Manager” on the blue toolbar.
2. Select an attendee by clicking the hyperlinked name. It does not matter which attendee at this point.
3. Click on the “Add Course button

4. Fill out the required information:
   a. Course Title
   b. Date Completed
   c. CPE Provider
   d. Method of Presentation
   e. CPE Credit
   f. Level
   g. Subject Areas for all necessary regulators

   Note: this is where any Custom Subject Areas can be credited for any Learning Ladders. If the course credit applies to a standard subject area, select from the drop-down of each appropriate regulator.
5. If multiple staff attended, click on the “Click Here” option to select staff that earned credit from the course. Click “Submit” when finished.

6. If applicable, use the “Choose File” option to upload individual Certificates for each attendee. Click Submit to complete the process. This is optional, if the certificates are being stored either physically or electronically elsewhere.