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
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.

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
SECTION 2: A Look Inside Your Firm's Account

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

- 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 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 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 *