**Customer Service Training**

**Reference Guide**

Webcasts

Q: Do I have access to the recording of the webcast after I attend?

A: Yes, you have access for 90 days after the original webcast date.

Q: Can I get CPE credit for watching the recording of the webcast?

A: No, to receive live CPE credit you must attend during the date and time of the webcast.

Q: How many poll questions can I miss and still get full credit?

A: You can miss 2 polls and received full CPE credit; attendees must also attend for a minimum of 100 minutes for CPE credit to be earned.

Q: I attended half of the webcast, can I get partial credit?

A: No, we do not offer partial credit.

Q: Will you report my credits to the IRS (or CTEC)?

A: Yes, on Fridays we report CPE for the past week as long as you have your PTIN entered into your professional profile.

Q: Why isn’t the IRS approval number on my certificate of completion?

A: You did not include your PTIN in the professional profile, once that is added the system will generate a certificate with the appropriate IRS approval number.

Q: I cannot attend the live webcast, can you refund my money or value pass hours?

A: Value pass holders can cancel anytime and refund the hours back to the pass, cancellations for those who paid for the live webcast 24 hours in advance can have full amount refunded back to credit card. If less than 24 hour notice is given, a $25 penalty will be assessed. If an extreme circumstance has occurred, please use best judgement – suggestion comp user into a different webcast rather than refunding money.

Q: The instructor went over the allotted time; can I get additional CPE credit?

A: No, unfortunately we can only assign credit for the amount indicated on the website.

Q: How do I join a webcast?

A: Login to your account on CPE Link, go to My CPE. Under the webcast tab, next to the name of the webcast there will be a link that says Join Webcast – this will log you into the webcast room. Participants can join a webcast 30 minutes prior to the event starting.

Q: Where do I access my materials for the webcast?

A: From the My CPE section of your account, under the webcast tab you will see an area for Materials next to the webcast name for the participants to download.

Q: I cannot hear the webcast/join the webcast?

A: Have you tested your computer for the Adobe Connect requirements from the Help part of the website to make sure your system has the appropriate add in? Try logging in from Chrome or Firefox, outdated IE browsers have issues with Adobe Connect.

Q: What is the dial in number for the webcast?

A: This will be listed in the webcast room.

Q: There was no submit button on the poll, did my answer get submitted?

A: Yes – clicking on the radio button next to the potential answer will register your vote. There is not a submit button.

Q: Why didn’t I receive CPE credit for this course?

A: Webcast hosts will post credits based on attendance time and polls answered; if the customer did not meet the criteria C PE credit is not awarded.

Self-Study

Q: How long do I have to complete a self-study course?

A: You have one year from the purchase date to complete the course. The expiration date will be listed in the My CPE section of your account.

Q: What is the passing score for self-study?

A: The passing score is 70%.

Q: How many times can I take the final exam?

A: You can take the final exam as many times as you need until you pass.

Q: Can I get an extension on my course?

A: No, per NASBA’s rules and regulations we cannot extend a course past the year deadline. The only exception to this is if a customer purchased a bundle of courses (2+ courses bought in the same transaction) a bundle can be extended 30 days. We cannot extend a single course regardless of what happened with the customer, this puts our compliance in jeopardy with NASBA, our governing board.

Q: I missed the promotion on Bundle X; can you still honor the price?

A: Yes- we can honor bundle pricing after the promotion has expired. You can manually change the price in the dashboard.

Q: Where do I locate my certificate?

A: You certificate is in the My CPE section of your account under the Past tab.

Q: What is the promo code for this bundle?

A: Locate this from the Marketing tab > Promotions to give to the customer.

Q: I cannot pass this final exam after X many tries; can you let me know which ones I got wrong?

A: No, the customer must pass the exam before you can communicate the final exam results.

Q: What questions did I get wrong after I passed the exam?

A: The customer can review the exam after passed, or from the dashboard you can review the customer’s final exam results to communicate to the customer.

Q: I passed the final exam and there was an error processing my results, where is my certificate?

A: Verify the answers from the customer, from the dashboard you can pass the user manually and enter notes. Please make a note of this so customers do not abuse this feature.

Q: I registered this course for myself but it’s actually for my boss, can you switch it?

A: Yes, you can transfer the registration to a different user by locating that customer’s ID from the dashboard then transferring the registration (works with live webcast registrations as well).

Q: Is this course approved by the IRS?

A: On the course description page, the course will say whether or not it qualifies for EA/OTRP credit. In general, tax courses are approved by the IRS – accounting, auditing, Excel, fraud courses do not count.

Compliance Manager

Q: Why isn’t this course showing up in my Compliance Manager?  
A: This course doesn’t qualify for your CPA license (you can look this up from the product edit instructions to view where the course qualifies and doesn’t)

Q: My reporting period isn’t right, can you take a look?  
A: Most times, customers select today’s date and get the wrong reporting period. Verify the initial licensing date and enter that into the customer’s compliance manager.

Q: How do I add courses from other providers into Compliance Manager?

A: From Compliance Manager, the customer can click on Add Course to enter the course details and upload the certificate to be tracked in CM.

Q: Do I have to fill out all the regulators for adding an external course?

A: The NASBA field of study is required for adding an external course, additional regulators can be added to make tracking more accurate.

Q: Are CPE Link courses tracked in Compliance Manager?

A: Yes, after a completed live webcast or self-study course the credits will automatically be tracked in CM.

Q: How can I get a copy of what courses I took for my employer?

A: From Compliance Manager in your account, you can click on Export to generate an Excel file for completed CPE tracked in CM.

Firms

Q: I am registering courses for multiple staff, what is my best option?

A: Setting up firm account with a firm administrator allows that customer to manage CPE for multiple staff members.

Q: How do I add users to my firm account?

A: Go to your firm CPE center, click on Professional Staff, click on Add Staff to set up the new user.

Q: How do I remove staff from my account?

A: Go to your firm CPE center, click on Professional Staff, next to that person’s name, select remove.

Q: What discount program do you have for firms?

A: The unlimited firm pass is a subscription program available for firms. A minimum of 5 passes must be purchased at $195 each for a year of unlimited access to all CPE Link webcast and self-study courses.

Q: Our firm admin left; can we switch this to someone else?

A: Yes, from the dashboard you can select the new firm admin.

Q: Can we have more than one firm admin on our account?

A: Yes, you can select multiple admins from the professional staff page and changing the user’s role from staff to administrator.

Q: We have multiple offices; can we have multiple offices set up for our firm?

A: Yes, from the firm profile the admin can click on +Add to add another location.

Q: Can I track CPE for my staff?

A: Yes, Compliance Manager can be set up for staff so the administrator can view CPE progress.

Q: How do I register my staff member for this course?  
A: From the firm admin’s account, locate the course on the website; add the course to the shopping cart, click on proceed to check out, then select the staff member’s name on the choose staff page. The customer will be notified a course was registered in his/her account and the firm admin will be copied on the email.

Discount Programs

Q: What is the difference between the Unlimited Webcast Pass and the Value Pass?  
A: The UWP is a subscription program where the customer can attend as many live webcasts in a year and the Value Pass allows a customer to customize how many self-study and/or webcast hours are needed within a year. Value pass users select prepaid hours at a discounted rated, UWP users have a subscription to webcasts.

Q: What is automatic renewal for UWP?

A: The automatic renewal discounts the UWP to $395 each year, meaning the customer will be automatically renewed the following year at $395. One single is year is $445.

Q: I need to cancel my UWP with automatic renewal, is there a penalty?

A: Yes, cancelling the UWP means the customer loses out on the discount pricing. From the dashboard, you can cancel the automatic renewal then do a payment adjustment to charge the $50.

Q: I have a Value Pass expiring soon, can I get an extension?

A: No, users must select which courses they are using the VP hours for by the expiration date. Hours can be rolled over for another year if a new Value Pass is purchased.

Q: Do I have to complete my self-study courses before my Value Pass expires?

A: No, the Value Pass expiration date is different than the course expiration date. Courses expire one year after being added to the users account; Value Passes expire one year after the purchase date.

Q: I am locked out of my CPE Link account and need to get my certificates, what happened?

A: Look in the customer notes for that user to view if that customer’s account was locked for an expired credit card and did not update for UWP automatic renewal. Let the user know he/she needs to pay either for a new year of UWP subscription or the $50 fee for cancelling to unlock the account. Once that is done, from customer details you can change the status from locked to active.

Partner Accounts

* CPE Link partners with the BDO Alliance and CEB members. These types of users are noted in the Customer Details area.
* BDO users must login to CPE Link through the BDO Alliance Portal.
* CEB users have access to self-study courses if they are logged in through the CEB Portal. Customer service for CEB users can be directed to: CEB.Support@cebglobal.com and 1-866-913-2632