

# Ultimate Tax University

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Ultimate Tax

User Guide

ULTIMATE TAX UNIVERSITY

# User Guide

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# Quick Setup Instructions

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## Objectives

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After completing this lesson, you should be able to:

- Log in as student manager and create a student
- Log in as a student.

## Student Managers

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1. Go to <http://training.etaxplace.com>.
2. Click the **Log in as Student Manager** link.
3. Type your client ID and unlock code.
4. Ultimate Tax University prompts you to change your password. You may want to write it down to make sure you have it later.
5. Select a secret question and create an answer. If you forget your password, Ultimate Tax University requests this information before allowing you to reset your password.
6. Click the **New Student** link on the left navigation bar and add the student you want to have access to Ultimate Tax University.
7. Click the **Create** button to save the student's account information.
8. Click the **View Groups** link on the left navigation bar.
9. Click the **Edit** link to edit the default user group.
10. Move the student name and available libraries from the left windows to the right windows.
11. Click the **Save** button.
12. Click the **logout** link at the top right.

## Students

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1. Navigate to <http://training.etaxplace.com>.
2. Click the **Log in as Student** link.
3. Type the same client ID that you used to set up students, along with the student's user name that was created in Student Manager.
4. The student's password is the user name.
5. Ultimate Tax University prompts you to change the password. You may want to write this password down to ensure that you remember it.
6. Select a secret question and create an answer. If you forget your password, Ultimate Tax University requests this information before allowing you to reset your password.
7. Click the **My Courses** tab and navigate to the library, curriculum, and then course that you want to take.

## Objectives

After completing this lesson, you should be able to:

- Navigate Ultimate Tax University.

## Purchasing Curricula

1. To access Ultimate Tax University, type the URL <http://training.etaxplace.com> in your browser's address bar. We have added a new home page, which allows you to see valuable information, as well as a listing of available content, before logging in to the site.



The screenshot shows the Ultimate Tax University website. At the top, the logo "Ultimate Tax University" is displayed in a stylized font. Below the logo is a navigation menu with five tabs: "Home" (highlighted in green), "My Courses", "My Transcript", "My Account", and "About Us". The main content area is divided into two columns. The left column features a photograph of a smiling woman on a headset, with the heading "Welcome to Ultimate Tax University!" and a paragraph describing the web-based learning system. Below this is a "Log in as Student Manager" and "Log in as Student" link. The right column has the heading "How does Ultimate Tax University work?" and two paragraphs of text, one mentioning a user guide PDF and the other providing a contact number (866-386-7211). A "View and Purchase Courses" button is located at the bottom right of the main content area. At the bottom of the page, a message states that certain plugins are required for content viewing, and three download buttons are provided: "Windows Media Player 11 FREE", "Get ADOBE FLASH PLAYER", and "Get ADOBE READER".

Ultimate Tax University has tabs at the top of the page to allow you to access the home page, your courses, your transcript of courses completed, your account information, and information about CCH Small Firm Services.

If you already have your Ultimate Tax University student login information, you can click the **My Courses** or other tabs to log in to the site directly. You can also click the **Log in as Student Manager** or **Log in as Student** links on the left of the screen to access either of these pages directly.

You can click the **Ultimate Tax University User Guide (PDF)** link to view this user guide.

If you would like to view the content of the site before logging in, click the **View and Purchase Courses** button. You can see a list of all libraries here, and select the content to log in to the site and access it.

The screenshot shows the Ultimate Tax University website interface. At the top is the logo "UltimateTax University" in a stylized font. Below the logo is a navigation menu with five tabs: "Home" (highlighted in green), "My Courses", "My Transcript", "My Account", and "About Us".

Below the navigation menu is a section titled "Libraries" which contains a table with the following columns: "Title", "Price Per Student", and "Description". The table lists several libraries with their respective titles, prices, and descriptions. Each row includes a "View Curricula" link, and some rows also include a "Purchase Library" or "Select Library" link.

Title	Price Per Student	Description	View Curricula	Purchase Library	Select Library
2010 Client Accounting Suite: Setting Up Your Firm		This library describes how to enter your firm information and set up as a client.	<a href="#">View Curricula</a>		
California Tax Education Council 60-Hour Qualifying Education	\$252.00	This library includes the 45-hour Federal and 15-hour California requirement for the CTEC qualifying education course.	<a href="#">View Curricula</a>	<a href="#">Purchase Library</a>	
Ethics		This is the Ethic Library including Section 7216 Regulations and Circular 230 Overview curricula.	<a href="#">View Curricula</a>		
2010 Payroll Compliance Reporting		This library contains curricula providing information about the Payroll Compliance Reporting software.	<a href="#">View Curricula</a>		
TaxWise Free Training	Free	This is the 2009 TaxWise Free Training library, which includes the TaxWise Features, Main Info, Individual Workshop Returns, and Business Workshop Returns.	<a href="#">View Curricula</a>		<a href="#">Select Library</a>
Taxation		This is the Taxation library. It covers the 2009 Basic Income Tax, 2009 Before You Begin a Return, 2009 Individual Income Tax Preparation and Preparer Responsibility curricula, and 2010 Individual Income Tax Preparation and Preparer Responsibility curricula. 2011 Individual Income Tax Preparation and Preparer Responsibility is also available with limited features including only printables and the quizzes and exams, no media has been posted yet.	<a href="#">View Curricula</a>		

Click the **View Curricula** link to view a list of the curricula that are located in that library. Ultimate Tax University displays the title, price, and description of each curriculum in the library.

The screenshot shows the Ultimate Tax University website interface. At the top is the logo "UltimateTax University" in a stylized font. Below the logo is a navigation menu with five buttons: "Home" (highlighted in green), "My Courses", "My Transcript", "My Account", and "About Us".

Below the navigation menu, there are two links: "Libraries" and "Curricula". The "Curricula" link is active, leading to a table of curriculum listings.

Title	Price Per Student	Description		
CTEC Qualifying Education Course Student Instructions	Free	View this document prior to completing any CTEC lessons. The individual courses can be taken for continuing education.	<a href="#">View Courses</a>	<a href="#">Select Curriculum</a>
2009 Individual Income Tax Preparation and Preparer Responsibility	\$220.00	This 45-hour curriculum contains the information you need to prepare a complete individual tax return. It also includes information on Circular 230 Ethics and information on electronically filing, amended returns, and extensions.	<a href="#">View Courses</a>	<a href="#">Purchase Curriculum</a>
California Individual Income Tax	\$110.00	This curriculum makes up the California 15-hour qualifying education requirement for CTEC.	<a href="#">View Courses</a>	<a href="#">Purchase Curriculum</a>
2010 Individual Income Tax Preparation and Preparer Responsibility	\$220.00	This curriculum contains 45 hours of instruction on the individual income tax, including all topics necessary to complete a Form 1040 tax return. This course does not currently offer CPE for CPAs or EAs.	<a href="#">View Courses</a>	<a href="#">Purchase Curriculum</a>

You can purchase the curriculum by clicking the **Purchase Curriculum** link on the left, or see the list of courses in the curriculum by clicking the **View Courses** link.

Ultimate Tax University displays all of the courses in that curriculum, along with the description, number of CPE credits, and the price per student.

The screenshot shows the Ultimate Tax University website interface. At the top is the logo "UltimateTax University". Below the logo is a navigation menu with buttons for "Home", "My Courses", "My Transcript", "My Account", and "About Us". Under the "My Courses" button, there are links for "Libraries", "Curricula", and "Courses". The main content area displays a table of 2010 tax courses. Each row includes a title, a description link, and columns for NASBA CPE, EA CPE, CTEC FED, and Price Per Student. A "Purchase Course" link is provided for each course. At the bottom of the table, there are page navigation numbers: 1, 2, and 3.

Title	Description	NASBA CPE	EA CPE	CTEC FED	Price Per Student	
2010 Before Tax Season Begins	<a href="#">Course Description</a>	0	0	1.50	\$19.00	<a href="#">Purchase Course</a>
2010 Before You Begin a Return	<a href="#">Course Description</a>	0	0	2	\$25.00	<a href="#">Purchase Course</a>
2010 Which Form Do I File?	<a href="#">Course Description</a>	0	0	1	\$12.00	<a href="#">Purchase Course</a>
2010 General Income	<a href="#">Course Description</a>	0	0	2.50	\$30.00	<a href="#">Purchase Course</a>
2010 Investment Income	<a href="#">Course Description</a>	0	0	2	\$25.00	<a href="#">Purchase Course</a>
2010 Business Income	<a href="#">Course Description</a>	0	0	1.50	\$19.00	<a href="#">Purchase Course</a>
2010 Farm Income	<a href="#">Course Description</a>	0	0	1	\$12.00	<a href="#">Purchase Course</a>
2010 Supplemental Income	<a href="#">Course Description</a>	0	0	1	\$12.00	<a href="#">Purchase Course</a>
2010 Retirement Income	<a href="#">Course Description</a>	0	0	1	\$12.00	<a href="#">Purchase Course</a>
2010 Business and Retirement Deductions	<a href="#">Course Description</a>	0	0	2	\$25.00	<a href="#">Purchase Course</a>

Click the **Purchase Course** link to purchase this course.

You can purchase the course subscription for one user or for multiple users. If you purchase for one user, you can log in to the student site to access the course.

If you purchase for setting up and managing other students, you can log in to the Student Manager site to assign the course(s) you purchase to students.

The screenshot shows the 'UltimateTax University' website interface. At the top, there is a navigation menu with buttons for 'Home', 'My Courses', 'My Transcript', 'My Account', and 'About Us'. The 'Home' button is highlighted in green. Below the navigation menu, the page displays 'Item Details' for a course titled '2010 Before Tax Season Begins'. The price per student is listed as '\$19.00' and the content type is 'Course'. There is a 'Promotion Code:' label followed by an empty text input field. Below this, a section titled 'Select one of the following account options:' contains two radio button options. The first option, 'Are you setting yourself up as the only student who will ever use this account?', is selected. The second option is 'Are you setting up and managing other students, even if you are only setting one student up at this time?'. At the bottom of this section is a 'Continue' button.

**UltimateTax University**

Home My Courses My Transcript My Account About Us

Item Details

Title: 2010 Before Tax Season Begins

Price Per Student: \$19.00

Content Type: Course

Promotion Code:

Select one of the following account options:

Are you setting yourself up as the only student who will ever use this account?

Are you setting up and managing other students, even if you are only setting one student up at this time?

Continue

To purchase for managing students, click the second radio button. Type the number of licenses you want and your e-mail address, and then click the **Continue** button.

**UltimateTax University**

Home My Courses My Transcript My Account About Us

Item Details

Title:	2010 Before Tax Season Begins
Price Per Student	\$19.00
Content Type:	Course

**Promotion Code:**

**Select one of the following account options:**

Are you setting yourself up as the only student who will ever use this account?

Are you setting up and managing other students, even if you are only setting one student up at this time?

**Number of licenses:**

**Please enter your email address:**

Ultimate Tax University displays a purchase confirmation page. This displays the name of the course, curriculum, or library you selected for purchase, the price per student, number of licenses, and the final purchase price. Click the **Back** button to go back and change your order, or click the **Continue** button to continue with your purchase.

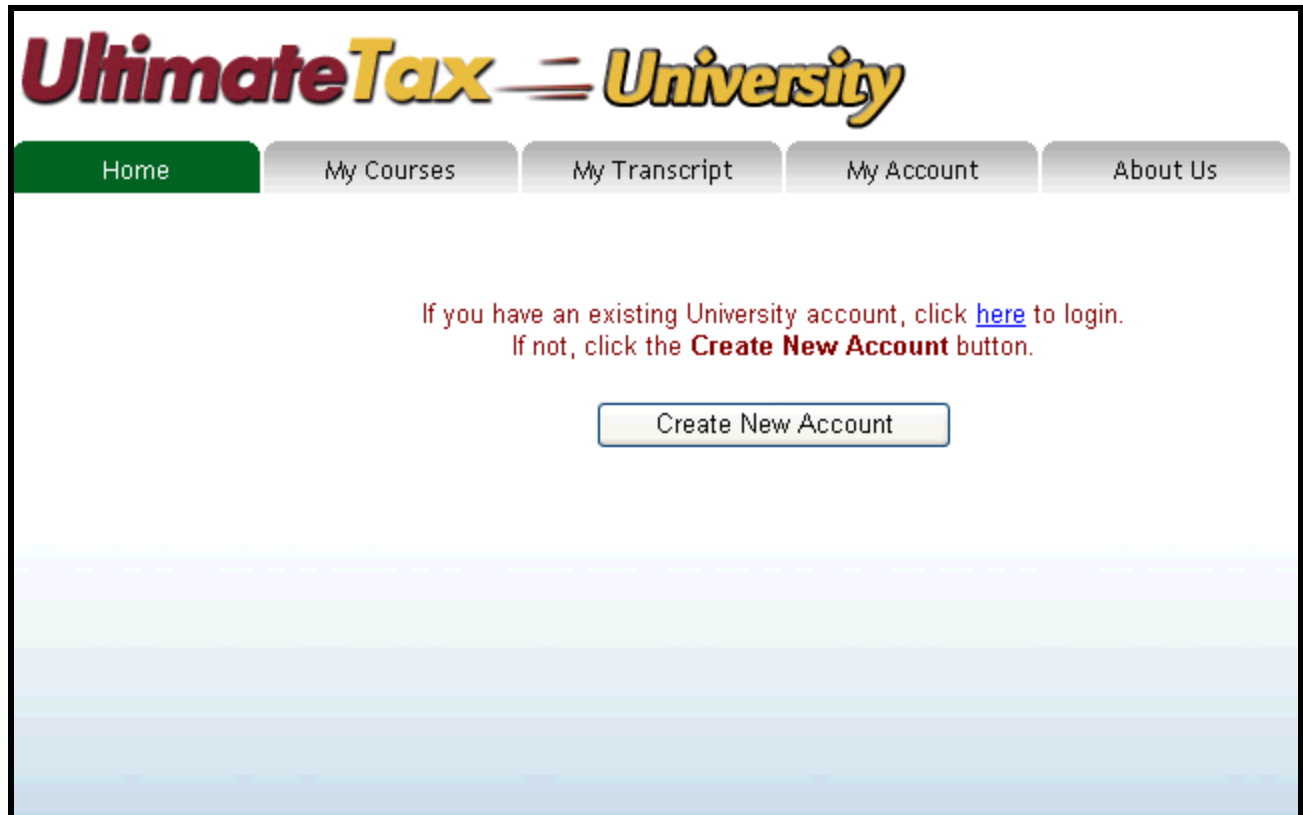
The screenshot shows the Ultimate Tax University website interface. At the top, the logo "UltimateTax University" is displayed in a stylized font. Below the logo is a navigation menu with five buttons: "Home" (highlighted in green), "My Courses", "My Transcript", "My Account", and "About Us".

The main content area features a red heading: "You have chosen to purchase the following item. Please review before purchase." Below this heading is a table with two columns. The left column lists purchase details, and the right column shows the corresponding values.

<b>Title</b>	2010 Before Tax Season Begins
<b>Content Type</b>	Course
<b>Price Per Student</b>	\$19.00
<b>Number of Licenses</b>	1
<b>Final Purchase Price</b>	\$19.00

Below the table, there are two buttons: "Back" and "Continue".

Ultimate Tax University displays a page asking you whether you already have an Ultimate Tax University account. If you have an existing University account, click [here](#) to login. If not, click **Create New Account** button below.



Ultimate Tax University displays your new account information and automatically e-mails this information to the e-mail address you entered earlier. Keep this information for future use. You will need it if you need to have your password reset. If you already have an Ultimate Tax University account, or after you create an account, click the **here** link to log in.


Because you selected that you want to purchase multiple users, Ultimate Tax University displays the Student Manager login page. If you had selected that you want to purchase only one user, Ultimate Tax University would direct you to the student login page.

Type your Client ID and Password to log in to Ultimate Tax University.

**Note:** See the next sections of this guide, *Student Manager* and *Student* for detailed instructions for logging in to Ultimate Tax University.

## UltimateTax University

Click [here](#) to add or modify users and assign courses to your students.

 If you need assistance, you may click on the 'Need Help' link below.

**Client ID:**

**User Name:**

**Password:**

[Need Help?](#)

**Warning: Three unsuccessful login attempts will lock your account.**

Remember Me


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[Terms Of Service](#)

Ultimate Tax University displays the credit card form. Complete this form with your credit card information. Click the **Continue** button to purchase the content.

Payment Method:  Credit Card  ACH

**Payment Information**

Card Type:



Credit Card Number:

Expiration Date:

Account Holder Name:

Billing Address:

Billing City:

Billing State/Zip:

Account Holders Telephone Number:

Account Holders Email Address:

**SOFTWARE PURCHASES/ELECTRONIC FILING FEES/OTHER FEES/CHARGES**

1. Customer understands and agrees that UTS shall have planned for and incurred expenses in anticipation of its performance under the License Agreement for software licensed by Customer and that Customer shall have received value from UTS such as prior year software and registration codes, access to the Electronic Filing Center, and training and marketing materials prior to receipt of the software package itself and that no refund shall be made for any reason more than 30 days after the date of placing the order for the software. In no event will shipping and handling charges be refunded.
2. We require the credit card to have sufficient available credit to meet all expected charges. A credit card that is invalid or declined will result in the suspension of transmission privileges.
3. Should you have a question with a bill, we will be happy to discuss the issue with you. If we have made an incorrect charge, we will adjust your account immediately and show the adjustment on your next statement.

*Please retain a copy for your records.*

After you purchase the content, Ultimate Tax University opens Student Manager. See the next section in this guide for information on logging into and using the Ultimate Tax University Student Manager and assigning the content you purchased.

Note that if you purchased content for only one user and logged in to the Student site, Ultimate Tax University opens the student site. You can then navigate to the course you purchased and access that course.

## Objectives

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After completing this lesson, you should be able to:

- Log in to Ultimate TaxUniversity as the administrator
- Choose a new password and reset the password
- Download any required software
- Allow or restrict curricula and courses
- View, add, and deactivate students.
- Reset student passwords
- Create groups
- Assign curricula to groups
- Run Student Manager Reports
- Log out of Ultimate Tax University

## Choosing a New Password

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If you created an account for only one student, skip this section of the user guide. You can request to upgrade to a multiple user account later, but you do not need this information if you have only one student account.

The first time you log in to Ultimate Tax University as the administrator, use your Client ID, user name ADMIN, and your unlock code, all of which are contained in the e-mail you receive when you sign up for an Ultimate Tax University account.



The screenshot shows a login interface with the following elements:

- Client ID:
- User Name:
- Password:
- [Need Help?](#)
- 
- Remember Me

Ultimate Tax University then asks you to choose a new password. The password for the student manager must meet certain guidelines, which include:

- The password must contain at least eight characters, but no more than 100 characters.
- The password must contain at least one number.
- The password cannot repeat any of the last ten passwords you used.
- The password cannot contain the user name.
- No two users with the same Client ID can have the same password.
- Passwords are case sensitive.

If the password you choose does not contain the required information, Ultimate Tax University does not allow you to create the password.

Type the password twice for verification.

## Secret Question

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Ultimate Tax University also requests that you choose a secret question and answer. If you forget your password, Ultimate Tax University requests this information before allowing you to reset your password.

## Forgotten Password

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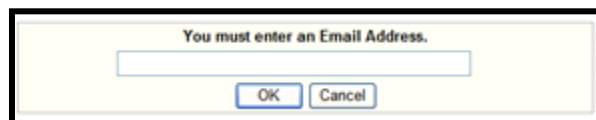
If you forget your password, click the **Click here if you have forgotten your password** link above the login information. Ultimate Tax University requests you type your client ID and user name and then answer your secret question. When you correctly answer the secret question, Ultimate Tax University gives you the chance to create a new password and secret question.

If you forget your password and cannot remember the answer to the secret question, the Ultimate Tax University support staff can reset your password. You may be required to answer certain questions to establish identity before the password is reset.

## E-mail Address

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Ultimate Tax University requires that you type your e-mail address. This is the e-mail address to which any correspondence concerning your Ultimate Tax University account will be sent.



## License Agreement

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The first time you log in to Ultimate Tax University, you must read and agree to the CCH Small Firm Services license agreement.

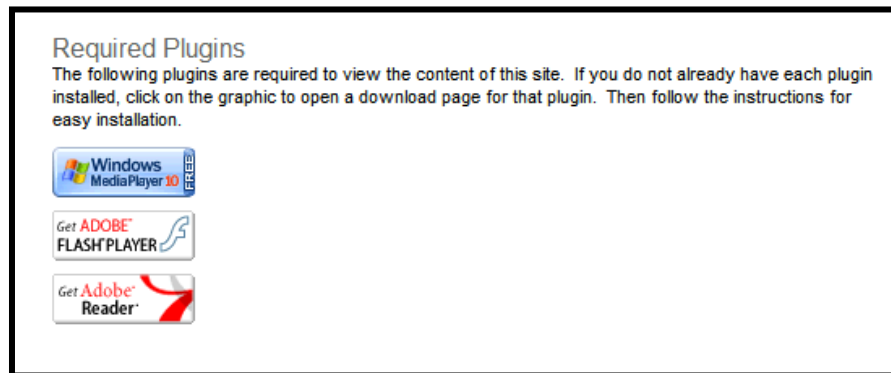
# Required Plugins

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Ultimate Tax University requires that you have certain software so that you can run the lessons correctly. You should make sure that you have:

- Windows MediaPlayer 11
- Adobe Flash Player
- Adobe Reader

If you do not have any of the required software for Ultimate Tax University, click the link on the right of the **Student Manager Home** page to go to the download site for that software.



# Libraries, Curricula, and Courses

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First, click the **View Libraries** link on the left side of the window.

## Libraries

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The libraries that your students can see are in the **Allowed Libraries** section.

The libraries that you have restricted your students from seeing are in the **Restricted Libraries** section.

If either the **Allowed Libraries** or **Restricted Libraries** have no curricula or courses, Ultimate Tax University displays a **There are no allowed/restricted curricula for this school** message in that section.

## View School Libraries

### Allowed Libraries

	Title	Description	
<a href="#">View Library</a>	California Tax Education Council 60-Hour Qualifying Education	This library includes the 45-hour Federal and 15-hour California requirement for the CTEC qualifying education course.	<a href="#">Select to Restrict</a>
<a href="#">View Library</a>	Ethics	This is the Ethic Library including Section 7216 Regulations and Circular 230 Overview curricula.	<a href="#">Select to Restrict</a>
<a href="#">View Library</a>	Client Accounting Suite	The training in this library provides the student with complete training in the Client Accounting Suite. CPE credits are given for complete for each complete lesson.	<a href="#">Select to Restrict</a>
<a href="#">View Library</a>	2009 ATX CPE Training	This is the ATX CPE Training library. It covers Getting Started with ATX.	<a href="#">Select to Restrict</a>
<a href="#">View Library</a>	2010 ATX CPE Training		<a href="#">Select to Restrict</a>
<a href="#">View Library</a>	2010 Payroll Compliance Reporting	This library contains curricula providing information about the Payroll Compliance Reporting software.	<a href="#">Select to Restrict</a>
<a href="#">View Library</a>	2010 PrepWise		<a href="#">Select to Restrict</a>
<a href="#">View Library</a>	ATX Free Training		<a href="#">Select to Restrict</a>
<a href="#">View Library</a>	TaxWise CPE Training	This is the TaxWise CPE Training library. It covers the 2009 Administrative Features, 2008 Entering Data on the Main Information Sheet, and 2008 TaxWise Features curricula.	<a href="#">Select to Restrict</a>
<a href="#">View Library</a>	TaxWise Free Training	This is the 2009 TaxWise Free Training library, which includes the TaxWise Features, Main Info, Individual Workshop Returns, and Business Workshop Returns.	<a href="#">Select to Restrict</a>

1 2

### Restricted Libraries

	Title	Description	
<a href="#">View Library</a>	Taxation	This is the Taxation library. It covers the 2009 Basic Income Tax, 2009 Before You Begin a Return, 2009 Individual Income Tax Preparation and Preparer Responsibility curricula, and 2010 Individual Income Tax Preparation and Preparer Responsibility curricula. 2011 Individual Income Tax Preparation and Preparer Responsibility is also available with limited features including only printables and the quizzes and exams, no media has been posted yet.	<a href="#">Select to Allow</a>

## Restricting and Allowing

If you want to restrict all of your users from taking a particular library, you can do so by clicking the **Restrict** link on the right.

You can see any restricted libraries, curricula, or courses in the **Restricted Libraries** section.

## Curricula and Courses

On the **View School Libraries** screen, you can click the **View Library** link to see all of the curricula within the library, or the courses within a curriculum, along with the course description.

You can restrict all of your users from taking a particular curriculum or course, just as with libraries.

To navigate from the **View Courses** page to either **Home** or **View School Libraries**, either use the menu at the left of the screen or the Back arrow.

# Assign Content

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If you purchased content that you need to assign to students, click the **Assign Content** link on the left to view the purchased content.

Ultimate Tax University displays a list of all content that you have purchased, along with the type, available licenses, used licenses, the purchase date, and the expiration date.

<b>Assign Content</b>						
Purchased Content						
	Title	Content Type	Available Licenses	Used/Assigned Licenses	Purchase Date	Expiration Date
<a href="#">Select</a>	2009 Before Tax Season Begins	Course	1	0	6/22/2010 12:30:32 PM	6/22/2011 12:30:32 PM
<a href="#">Select</a>	2009 Before You Begin a Return	Curriculum	1	1	11/2/2009 3:37:55 PM	11/2/2010 3:37:55 PM
<a href="#">Select</a>	2010 Before Tax Season Begins	Course	1	0	2/7/2011 2:09:34 PM	2/7/2012 2:09:34 PM
<a href="#">Select</a>	2010 Before Tax Season Begins	Course	1	0	2/7/2011 2:12:10 PM	2/7/2012 2:12:10 PM
<a href="#">Select</a>	Section 7216 Regulations	Curriculum	1	1	11/3/2009 7:59:32 AM	11/3/2010 7:59:32 AM

The expiration date is one year from the date you purchase the content. This does not change if you assign the content to students at a later date. You have twelve months from the date you purchase the content to use it, regardless of when you assign it to a student.

Click the **Select** link to assign the content to students.

Ultimate Tax University displays any students to which you have already assigned the content at the top of the page. At the bottom of the page, Ultimate Tax University displays a list of all active students to whom you have not assigned this content. Click the **Assign** link next to each student to whom you want to assign the content.

Be sure that you assign the content to the correct students. After a student takes a course, you cannot unassign it from that student's assignments.

**Assign Content**  
**Course - 2009 Before Tax Season Begins**

**Assigned students**  
*There are no students assigned to this content.*

**Unassigned students**

Name	Username	Email	
Anthony, Will	Will	<a href="mailto:williamblankenship@uchicago.edu">williamblankenship@uchicago.edu</a>	<a href="#">Assign</a>
B, Shanon	Shanon	<a href="mailto:aaron.blankenship@uchicago.edu">aaron.blankenship@uchicago.edu</a>	<a href="#">Assign</a>
James, Richard	RJames	<a href="mailto:Richard.J@newswr.com">Richard.J@newswr.com</a>	<a href="#">Assign</a>
Johnson, Mark	Mark	<a href="mailto:Mark_J@test.com">Mark_J@test.com</a>	<a href="#">Assign</a>
Jones, William	William	<a href="mailto:aaron.blankenship@uchicago.edu">aaron.blankenship@uchicago.edu</a>	<a href="#">Assign</a>

1 2

[Back](#)

Continue to assign students to all purchased content.

# Students

To view all active and deactivated students, click the **View Students** link.

On this page, you can see each student’s full name and user name.

**View Students**

Active Students

Name	Username	Email		
<a href="#">Edit</a> B, Shanon	Shanon	<a href="mailto:aaron.blankenship@uchicago.edu">aaron.blankenship@uchicago.edu</a>	<a href="#">Deactivate</a>	<a href="#">Reset Password</a>
<a href="#">Edit</a> Blankenship, Aaron	Aaron	<a href="mailto:aaron.blankenship@uchicago.edu">aaron.blankenship@uchicago.edu</a>	<a href="#">Deactivate</a>	<a href="#">Reset Password</a>
<a href="#">Edit</a> Johnson, Mark	Mark	<a href="mailto:Mark_J@test.com">Mark_J@test.com</a>	<a href="#">Deactivate</a>	<a href="#">Reset Password</a>

Deactivated Students

Name	Username	Email	
<a href="#">Edit</a> Anthony, Will	Will	<a href="mailto:williamblankenship@uchicago.edu">williamblankenship@uchicago.edu</a>	<a href="#">Activate</a>
<a href="#">Edit</a> James, Richard	RJames	<a href="mailto:Richard.J@newswr.com">Richard.J@newswr.com</a>	<a href="#">Activate</a>
<a href="#">Edit</a> Jones, William	William	<a href="mailto:aaron.blankenship@uchicago.edu">aaron.blankenship@uchicago.edu</a>	<a href="#">Activate</a>

# Resetting a Password

---

You can reset students' passwords if they forget them by clicking **Reset Password**. This sets the student's password back to the user name. Ultimate Tax University does not change the screen when you reset the password, but it does refresh the screen at that time.

If a student is no longer your employee, or if you want to remove that student from using Ultimate Tax University for any reason, click **Deactivate**. You can always reinstate the student's permissions by clicking **Activate** under the **Deactivated Students** heading.

# New Student

---

To add a new student, click the **New Students** link on the left. Type the student's first name, middle initial, last name, user name, and e-mail address.

If you have already created groups, choose the group to which you want the student to be assigned.

### Create New Student

CPE Hours Available: 0

First Name:

Middle Initial:

Last Name:

Username:

Email Address:

Select Group:  ▼

CPE Hours Allocated:  ▼

# Importing Students

---

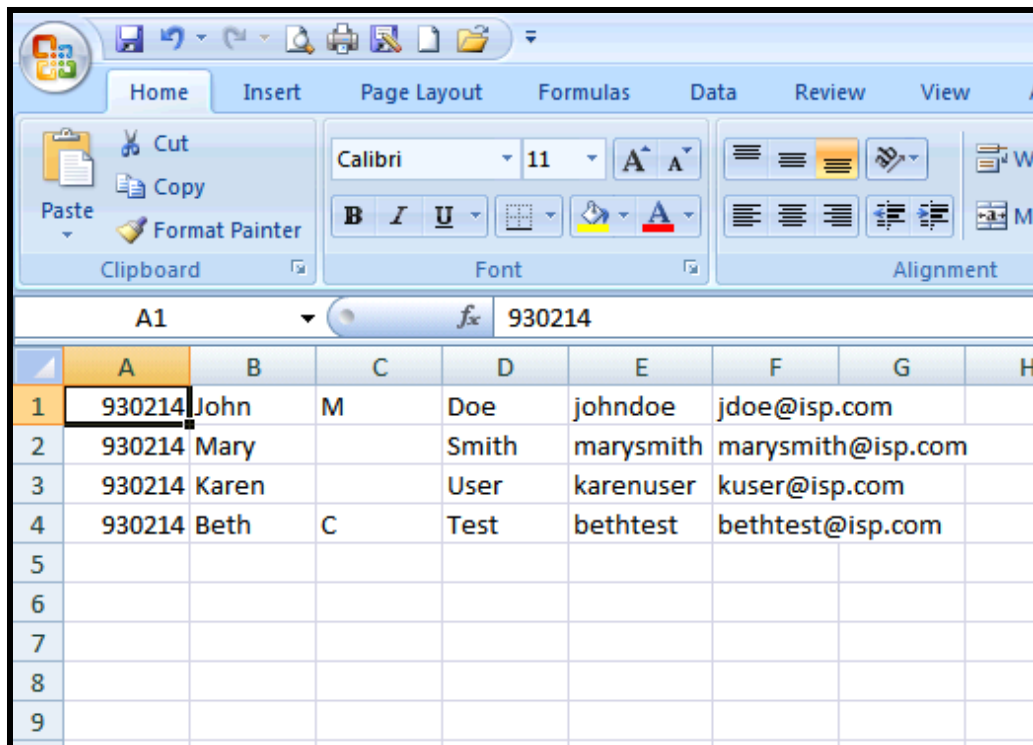
If you have multiple students that you need to add at the same time, you can do so by clicking the **Import Students** link on the left.

You must have an Excel spreadsheet with the students' information. This should be formatted in the Ultimate Tax University import format.

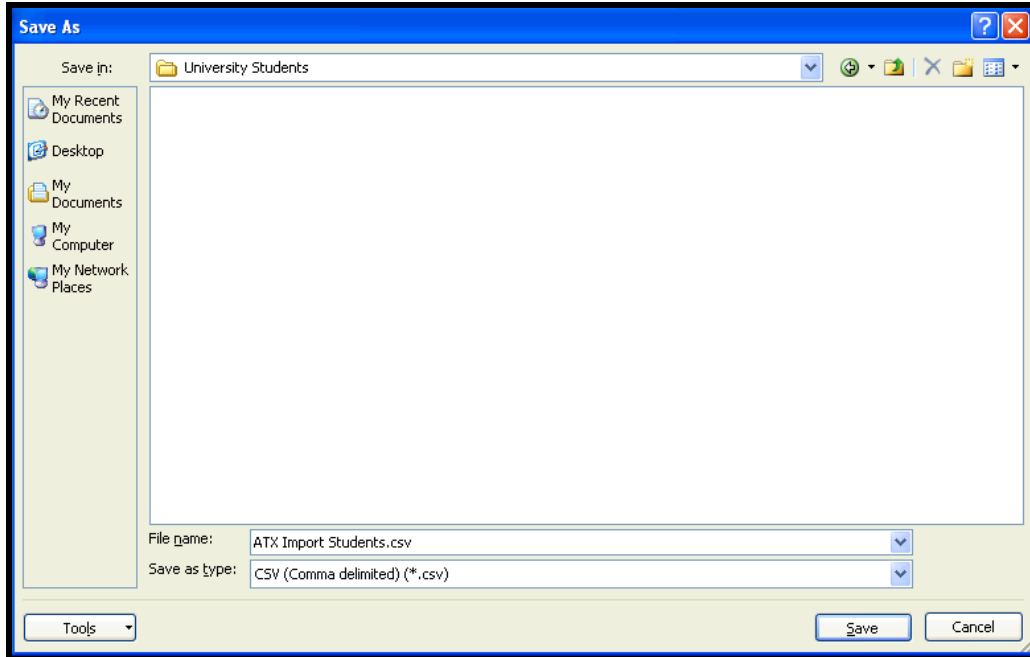
To format an Excel spreadsheet to import students, follow these steps:

1. Do not use any header information in the spreadsheet.

2. On an Excel spreadsheet, type your Client ID in the first column. Do this for all rows on which you list students.
3. In the second column, type the student's first name.
4. In the third column, type the student's middle initial. You can leave this column blank if you do not know or do not want to enter the student's middle initial, but you must include this column.
5. In the fourth column, type the student's last name.
6. In the fifth column, type the student's user name. Ultimate Tax University does not automatically create user names, so you must create one for each student.
7. In the sixth column, type the student's e-mail address. Make sure that this is in the valid e-mail address format ([email@isp.com](mailto:email@isp.com)).



8. Click the **Windows** icon at the top of the screen and click **Save As**.
9. Navigate to the location to which you want to save the file.
10. In the **File name** field, type the file name that you want to use.
11. In the **Save as type** drop-down list, select **CSV (Comma delimited) (\*.csv)**.

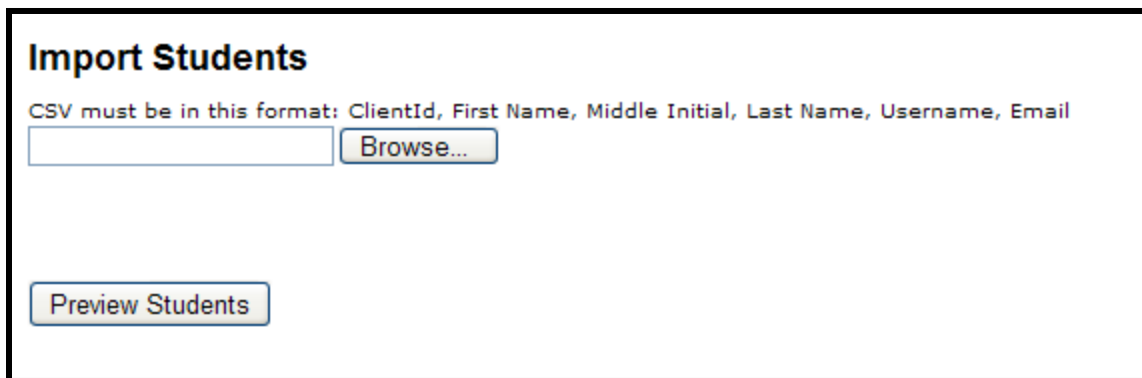


12. Click the **Save** button.

To import students in Ultimate Tax University, follow these steps:

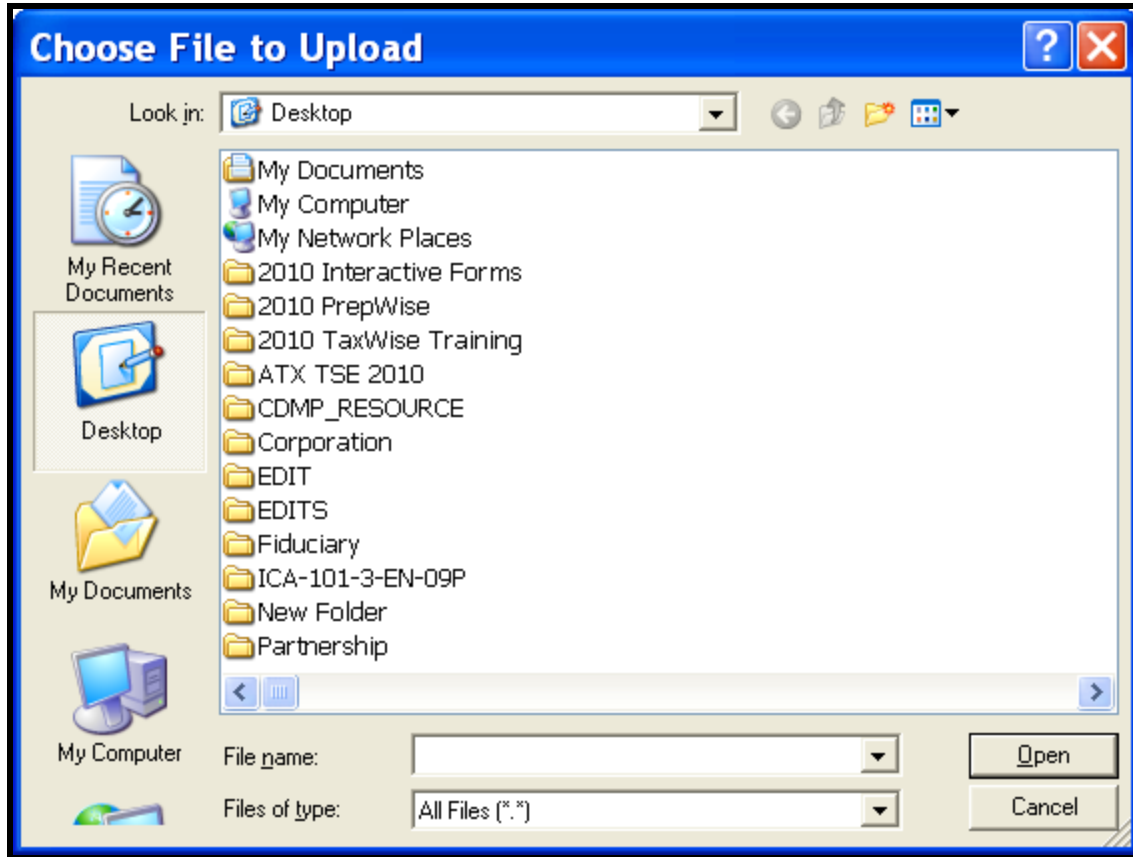
1. Make sure your formatted Excel spreadsheet is complete.
2. Click the **Import Students** link.

Ultimate Tax University displays the **Import Students** window:



3. Click the **Browse** button on the **Import Students** page.

Ultimate Tax University displays the **Choose File to Upload** window.



4. In the **Choose File to Upload** window, find the location of the formatted Excel spreadsheet.
5. Click the Excel spreadsheet. Windows displays the file name in the **File name:** box.
6. Click **Open**.
7. Click the **Preview Students** button. Ultimate Tax University shows you all of the students in the spreadsheet.



Ultimate Tax University displays the student list:

**Import Students**

First Name	M.I.	Last Name	Username	Email
John	M	Doe	johndoe	jdoe@isp.com
Mary		Smith	marysmith	marysmith@isp.com
Karen		User	kareuser	kuser@isp.com
Beth	C	Test	bethtest	bethtest@isp.com

Select Group:

8. If you want to assign all these students to the same group, select the appropriate group from the **Selected Group:** drop-down list.
9. Click the **Import** button. Ultimate Tax University imports the students.

## Groups

---

Groups allow you to assign students to the curricula you want them to take.

Click the **View Groups** link on the left of the screen. This shows you any groups you have created. If you have not created any groups, Ultimate Tax University displays only the **Default School Group**, which Ultimate Tax University automatically creates.

## Creating Groups

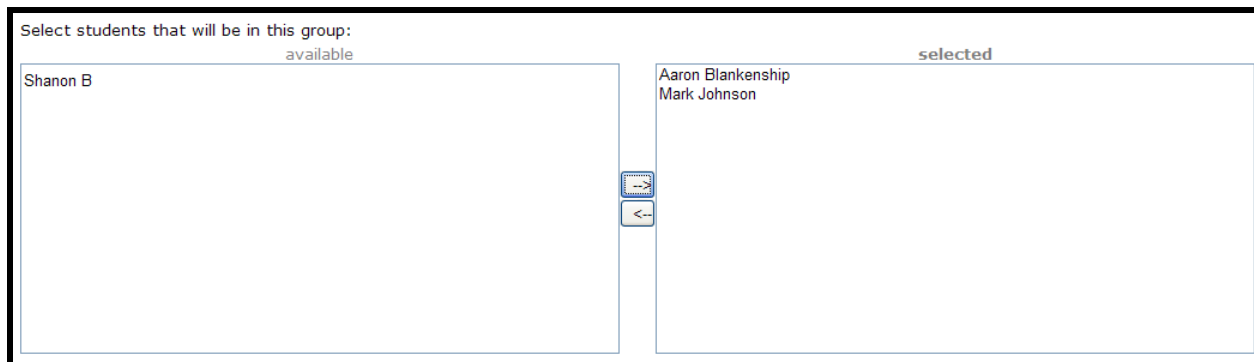
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To create a new group, select the **Create Group** link on the **View School Groups** page. Type the name you want the group to have in the **Group Title** box.

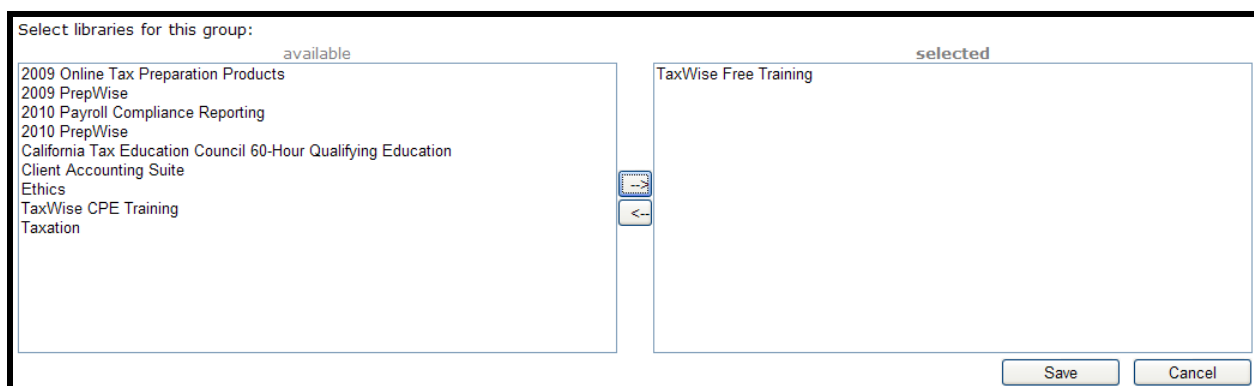
**Create School Group**

Group Title:

In the **Select students that will be in this group:** section, select any students from the available box on the right and move them to the selected box on the left by using the arrows.



In the **Select libraries for this group:** section, select any libraries from the available box on the right and move them to the selected box on the left by using the arrows.



Click the **Save** button. Ultimate Tax University assigns the selected students access to the select libraries.

## Editing Groups

---

You can change the information in each group at any time. To do this, use the following steps:

1. Click the **View Groups** link on the left of the screen.
2. Click the **Edit** link next to the group you want to edit.
3. Use the same steps to edit students and curricula that you used to originally assign the group.

## Reports

---

Ultimate Tax University also allows you to run reports to track the students' progress. To use the reports, click the **Reports** link on the left of the screen.

# Student Activity Reports

There are five Student Activity Reports: **Student Exam Activity Report**, **Student Quiz Activity Report**, **Student Course Activity Report**, **Course Completion Report**, and **Purchase History Report**.

The first type of report is the **Student Exam Activity Report**. This is a report, sorted by students, that allows you to see each individual student's progress in Ultimate Tax University.

To run this report, use the following steps:

1. Click the **Reports** link on the left of the page.
2. Click the **Student Exam Activity Report** link.
3. In the calendar, select the starting and ending dates you want the report to cover.
4. Click the **Get Report** button.

Ultimate Tax University then displays the report for these students. This report includes the user name, name, and the number of courses each student has passed or failed.

Student Manager Reports							<a href="#">logout</a>
Student Activity Report							
From 12/1/2008 to 2/23/2011							
	Name	Manager Group	Username	Email	Passed	Failed	
<a href="#">Select</a>	Blankenship, Aaron	1083245	Aaron	university.support@cchsfs.com	4	0	

[Go Back](#)

For more information on each student's courses, click the **Select** link.

Ultimate Tax University displays more detailed information about the courses the student completed. This includes the title, dates and times, the number of attempts, the first score and last score, and whether the student passed or failed.

Student Manager Reports										<a href="#">logout</a>
Student Activity Report										
From 12/1/2008 to 2/23/2011										
Name	Title	Course Started	First Test Date	Course Completed	Attempts	First Score	Best Score	Status		
Blankenship, Aaron	2009 Before You Begin a Return	6/22/2010 1:44:59 PM	6/22/2010 2:07:39 PM	6/22/2010 2:07:39 PM	1	100	100	Passed		
Blankenship, Aaron	2009 InterviewPLUS Online Getting Started	6/11/2010 11:33:57 AM	6/11/2010 11:34:40 AM	6/11/2010 11:37:09 AM	3	60	100	Passed		
Blankenship, Aaron	ATX Pay-per-Return System (PRS)	2/10/2011 1:29:04 PM	2/10/2011 1:36:33 PM	2/10/2011 1:36:33 PM	1	75	75	Passed		
Blankenship, Aaron	CCH Accounting Research Manager (ARM)	12/30/2010 3:53:32 PM	12/30/2010 4:03:06 PM	12/30/2010 4:03:06 PM	1	100	100	Passed		

[Go Back](#)

The second report is the **Student Quiz Activity Report**. This report displays information on which students have completed quizzes in Ultimate Tax University, including whether the student passed or failed the quizzes.

The third report is the **Student Course Activity Report**. This report displays information on the exam and quiz activity of the student.

The fourth report in Ultimate Tax University is the **Course Completion Report**. This report displays information sorted by courses rather than by students.

The fifth report is the **Purchase History Report**. This report includes all university purchases by both the student manager and students within the specified date range.

## Logging Out

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When you are finished in **Student Manager**, click the **logout** link in the upper right corner of the screen.

## Objectives

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After completing this lesson, you should be able to:

- Log in to the student application.
- Change your password.
- Select courses to take.
- View a lesson.
- Take quizzes and finals.
- View scores for all completed courses
- Print a certificate for completed courses

## Choosing a New Password

---

The first time you log in to Ultimate Tax University, use your Client ID and the user name assigned by your company's Ultimate Tax University administrator. The password is your user name. Remember, the user name and password are case sensitive.

Ultimate Tax University then asks you to choose a new password. The password must meet certain guidelines, which include:

- The password must contain at least eight characters, but no more than 100 characters.
- The password must contain at least one number.
- The password cannot repeat any of the last ten passwords you used.
- The password cannot contain the user name.
- No two users with the same Client ID can have the same password.
- Passwords are case sensitive.

If the password you choose does not contain the required information, Ultimate Tax University does not allow you to create the password.

Type the password again for verification.

## Secret Question

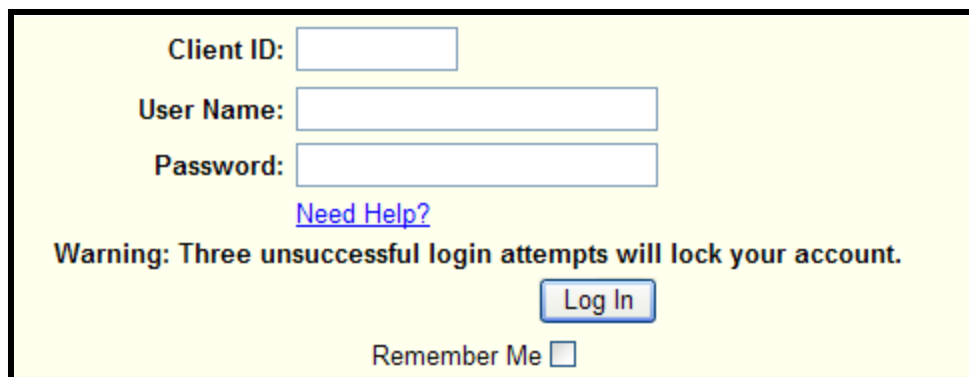
---

Ultimate Tax University also requests that you select a secret question and answer. If you forget your password, Ultimate Tax University requests this information before allowing you to reset your password.

## Forgotten Password

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If you forget your password, click the **Need Help?** link below the login information. Click the **Reset Password** button on the Need Help page. Ultimate Tax University requests the answer to your secret question. When you correctly answer the secret question, Ultimate Tax University resets your password to the original assigned password. For a student, the original password is your user name. You can then go through the steps of choosing a new password and secret question again.



Client ID:

User Name:

Password:

[Need Help?](#)

**Warning: Three unsuccessful login attempts will lock your account.**

Remember Me

If you forget your password and cannot remember the answer to the secret question, the Ultimate Tax University administrator for your company can reset your password.

## License Agreement

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The first time you log in to Ultimate Tax University, you must read and agree to the CCH Small Firm Services license agreement.

## Student Information

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The first time you log in to Ultimate Tax University, you must enter your personal information, including your name, e-mail address, mailing address, and professional designation.

If you are a CTEC tax return preparer, you must enter your CTEC number on this page in order for CCH Small Firm Services to report any CTEC continuing education credits to CTEC. This is an automatic process and is done only for customers with a CTEC number in the system.

**UltimateTax University** [Logout](#)

Home My Courses My Transcript **My Account** About Us

Home : My Account  
My Account

[Purchase History](#)  
[Personal Info](#)

Name Aaron

Address

City

State/Province

Postal Code

Company Name

Phone Number

Email Address

Enter your CTEC#  ex. A123456

Are you a(n)?  EA  CPA  CFP

If you are an EA, CPA, or CFP, select the check box at the bottom of the screen to show your professional designation. This helps the CCH Small Firm Services Online Training Team create additional courses to meet your needs.

## Required Plugins

Ultimate Tax University requires that you have certain software so that you can run the lessons correctly. You should make sure that you have:

- Windows MediaPlayer 11
- Adobe Flash Player
- Adobe Reader

If you do not have any of the required software for Ultimate Tax University, click the links on the bottom of the **Home** page to go to the download site for that software.

# My Courses

Click the **My Courses** at the top of the screen to view the courses that are available.

This page shows all of the libraries that are available on the Ultimate Tax University site.

Click the **Select** link to the right of the description to view a list of all curricula in the library.

**UltimateTax University** [Logout](#)

Home **My Courses** My Transcript My Account About Us

Home : My Libraries

### My Libraries

Title	Description	
2010 Client Accounting Suite: Setting Up Your Firm	This library describes how to enter your firm information and set up as a client.	<a href="#">Select</a>
California Tax Education Council 60-Hour Qualifying Education	This library includes the 45-hour Federal and 15-hour California requirement for the CTEC qualifying education course.	<a href="#">View Purchase</a>
Ethics	This is the Ethic Library including Section 7216 Regulations and Circular 230 Overview curricula.	<a href="#">Select</a>
2010 Payroll Compliance Reporting	This library contains curricula providing information about the Payroll Compliance Reporting software.	<a href="#">Select</a>
TaxWise Free Training	This is the 2009 TaxWise Free Training library, which includes the TaxWise Features, Main Info, Individual Workshop Returns, and Business Workshop Returns.	<a href="#">Select</a>
Taxation	This is the Taxation library. It covers the 2009 Basic Income Tax, 2009 Before You Begin a Return, 2009 Individual Income Tax Preparation and Preparer Responsibility curricula, and 2010 Individual Income Tax Preparation and Preparer Responsibility curricula. 2011 Individual Income Tax Preparation and Preparer Responsibility is also available with limited features including only printables and the quizzes and exams, no media has been posted yet.	<a href="#">Select</a>
TaxWise CPE Training	This is the TaxWise CPE Training library. It covers the 2009 Administrative Features, 2008 Entering Data on the Main Information Sheet, and 2008 TaxWise Features curricula.	<a href="#">Select</a>

# Taking a Course

Click the **Select** link to the right of the curriculum description to view additional information on the curriculum. This includes:

- The name of each course included in that curriculum.
- A description of each course.
- The number of CPE the course offers.
- The **Status**, which shows whether the course has been started, not started, and if the course has been passed or failed.

Click the **Select** link to open a course. There are three columns on this page.

The screenshot shows the 'Ultimate Tax University' website interface. At the top, there is a navigation menu with buttons for 'Home', 'My Courses' (highlighted in green), 'My Transcript', 'My Account', and 'About Us'. A 'Logout' link is visible in the top right corner. Below the navigation, a breadcrumb trail reads: 'Home : My Libraries : My Curricula : My Courses : My Lessons'. The main content area is titled 'Circular 230 Overview' and 'Lessons'. It contains a table with three columns: lesson titles, testing links, and status.

	Testing	Status
<a href="#">Circular 230 Printable</a>		Not Started
<a href="#">Lesson 1: Registered Tax Return Preparers</a>	<a href="#">Take Quiz</a>	Started
<a href="#">Lesson 2: Preparer Due Diligence</a>	<a href="#">Take Quiz</a>	Not Started
<a href="#">Lesson 3: Fees and Solicitation</a>	<a href="#">Take Quiz</a>	Not Started
<a href="#">Lesson 4: Conflicting Interests and Best Practices</a>	<a href="#">Take Quiz</a>	Not Started
<a href="#">Lesson 5: Other Document Standards</a>	<a href="#">Take Quiz</a>	Not Started
<a href="#">Circular 230 Overview Key Terms/Index</a>		Not Started
Final Exam	<a href="#">Take Exam</a>	

The **Lessons** page is divided into three columns:

- The lessons are listed in the first column. Click the lesson title to view the lesson.
- The **Testing** column has a link to the corresponding quiz to each lesson.
- The **Status** column shows whether the course has been started, not started, and if the course has been passed or failed.

# Viewing a Lesson

---

Click the lesson title link. Ultimate Tax University opens the lesson presentation. It may take a few minutes for the lesson to fully load, depending on your Internet connection and the type of lesson presentation.

There are two main types of lesson presentations in Ultimate Tax University: full media presentations and Adobe PDF text materials. Make sure you have the required plugins before viewing these lessons.

Ultimate Tax University's full media lessons consist of recorded audio and either:

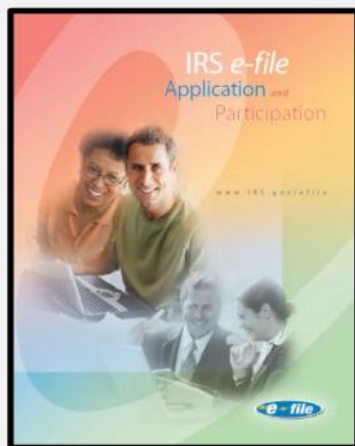
- A slide presentation, including images, that you can read as you listen to the lesson
- A demonstration that shows the full mouse navigation through a program.

You should begin with the course description for each course you take. The course description gives you information about things you need in order to complete the lessons, a description of the lessons, and the learning objectives for the course.

You should also open and either save or print the **Key Terms** for each course. Key terms are terms that are used in the course that may not be commonly recognized. The **Key Terms** document gives you the slide location of each term within the online lessons so that you can quickly find the term when working in the lessons.

When viewing a lesson using the full media, this is an example of what you might see:

## IRS Publication 3112



- Rules for participation
- Review before submitting
- Update your knowledge prior to each tax season

CCH Small Firm Services  
a Wolters Kluwer business

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ADOBE CAPTIVATE™

Notice the playback control in the lower left corner of the screen. Use this to navigate through the lessons easily. You can rewind, pause, and fast forward the presentation. This helps if you need to replay a section and listen to the material again.

Some courses have supplementary documents that you can print and use to follow the lessons.

## Taking a Quiz

Your next step depends on which lesson format you choose. If you are going to complete the printable course (if available), click the printable course title link for the printable version and either save it to your computer or print it out.

### Printable Lesson

When completing the course in printable format, make sure you have all necessary items prior to beginning the course. You need to complete the examples as you go through the lessons. After completing each chapter of the printable course, log in to the Ultimate Tax University and complete the corresponding quiz.

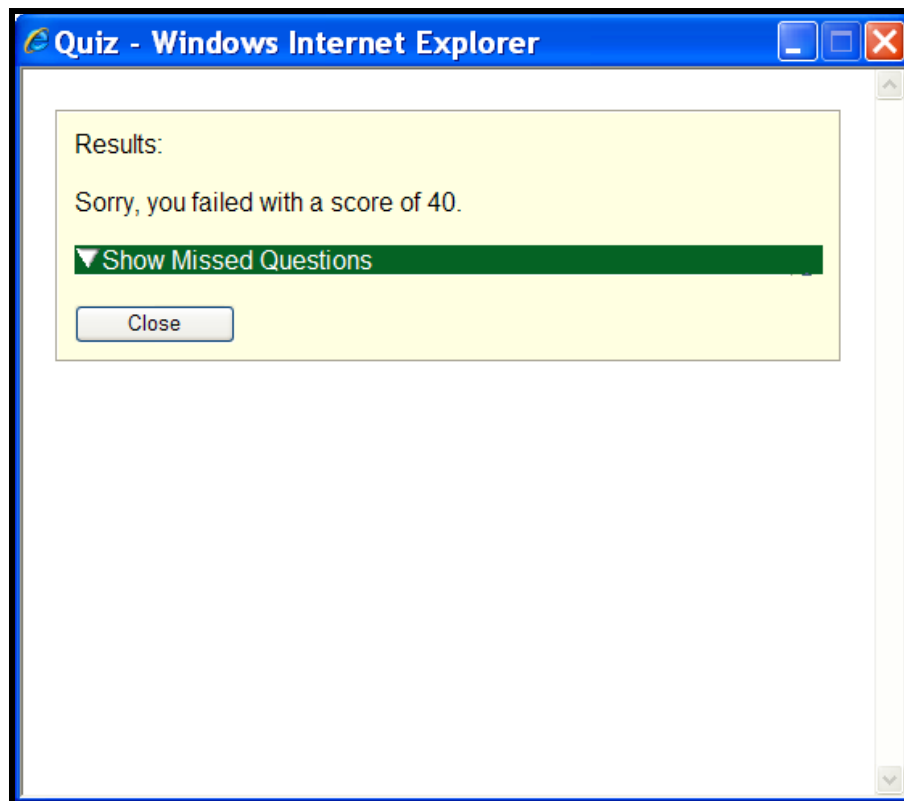
To take the quiz for the lesson, click the **Take Quiz** link for the lesson completed.

Ultimate Tax University displays the quiz in a new Internet Explorer window. Read each question and answer choice thoroughly before choosing your answer. To answer the questions, select the radio button that corresponds with your answer choice and click **Submit**. Ultimate Tax University

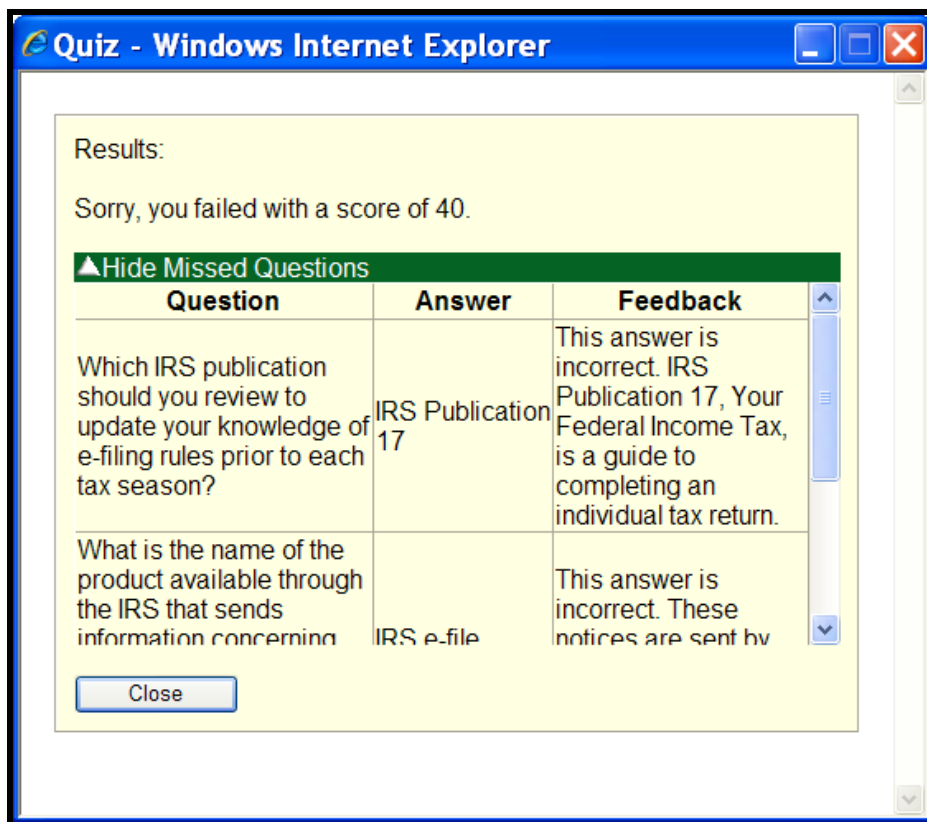
displays feedback which informs you whether or not you answered the question correctly and why the answer you chose is correct or incorrect. This reinforces what you have learned and allows you to understand the material. You can take quizzes as many times as necessary to ensure you understand the material.

Note that you must view the lesson before you can take a quiz, and you must take the lessons in order. Ultimate Tax University does not allow you to continue if you attempt to take quizzes out of order. You also must pass all quizzes in the course before you can take the final exam.

When you finish each lesson, Ultimate Tax University shows your results on the screen.



Click the **Show Missed Questions** link to show the questions you missed, with the feedback for each missed question.



Complete each lesson and quiz in the order they appear in the list. Once you have completed all of the lessons and quizzes, you are ready to take the final exam for the course. To start the final exam, click the **Take Exam** link at the end of the lesson list.

Ultimate Tax University displays the final exam in a new Internet Explorer browser window. Complete the exam in the same manner as the quizzes; review each question and answer thoroughly and select the appropriate radio button for your answer choice. Final exams do not display feedback for your answer choices; however, Ultimate Tax University displays your final score when completed. You can take the final exam up to three times if you do not pass it. If you do not pass the final exam after three tries, you cannot get credit for the course. Once you pass the final exam, you cannot take it again.

## Online Lesson

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If you want to take the online lesson, click the lesson title link in the course list.

Ultimate Tax University opens a new Internet Explorer browser window in which the lesson plays. To activate the lesson controls, left-click one time in the lesson window. The lesson controls allow you to rewind, pause, fast-forward, view closed captioning, and close the lesson.

In order to rewind the lesson one slide, click the **Rewind** button. To go back one slide, click the **Back** button. To play the lesson when paused, click the **Play** button. To pause, click the **Pause** button. You can move forward one slide by clicking the **Forward** button. To view closed caption, click the **CC** button. To exit the lesson, click **Exit**.

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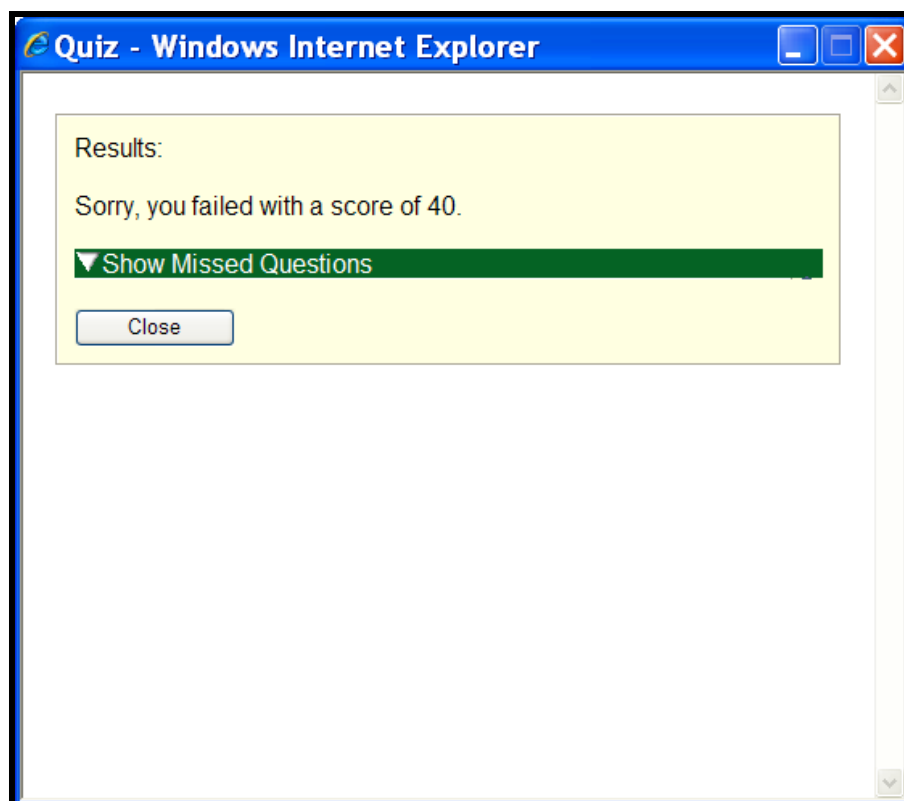
The lesson automatically plays when it finishes loading. Watch the entire lesson, completing any requested actions as you go. Once you have completed the lesson, click the **Exit** button.

Complete the corresponding quiz for each lesson as you finish the lesson. This allows you to determine your ability and review the lesson again if needed prior to taking the final exam. To take the quiz for the lesson, click the **Take Quiz** link for the lesson completed.

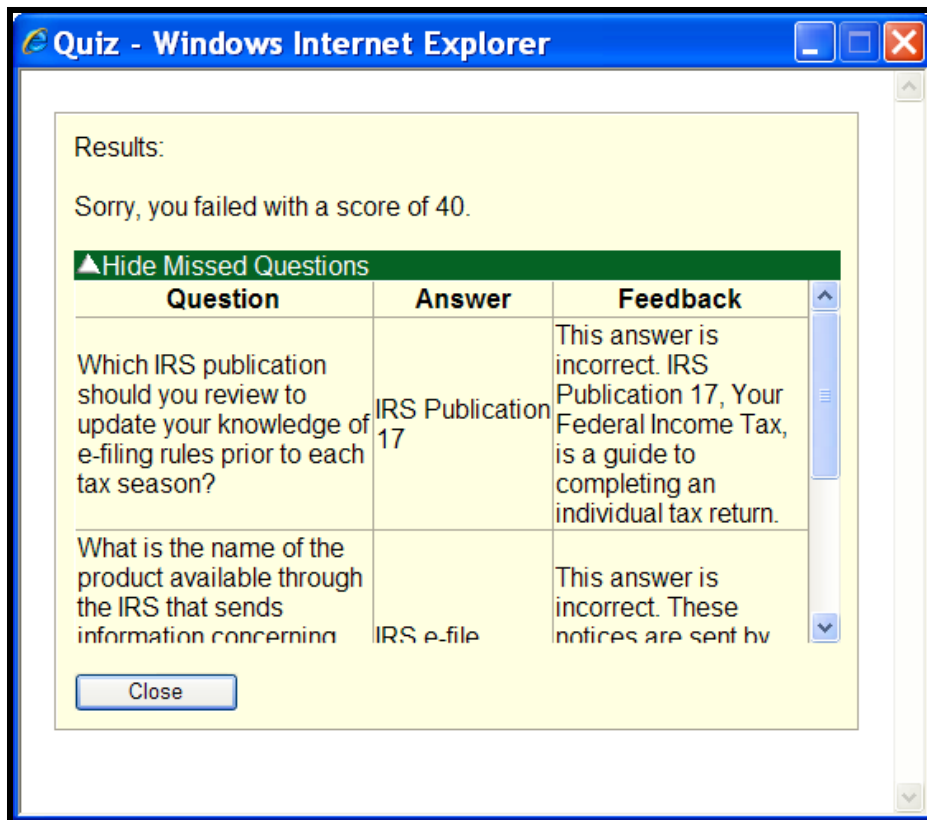
Ultimate Tax University displays the quiz in a new Internet Explorer window. Read each question and answer choice thoroughly before choosing your answer. To answer the questions, select the radio button that corresponds with your answer choice and click **Submit**. Ultimate Tax University displays feedback which informs you whether or not you answered the question correctly and why the answer you chose is correct or incorrect. This reinforces what you have learned and allows you to understand the material. You can take quizzes as many times as necessary to ensure you understand the material.

Note that you must view the lesson before you can take a quiz, and you must take the lessons in order. Ultimate Tax University does not allow you to continue if you attempt to take quizzes out of order. You also must pass all quizzes in the course before you can take the final exam.

When you finish each quiz or final exam, Ultimate Tax University shows your results on the screen.



Click the **Show Missed Questions** link to show the questions you missed, with the feedback for each missed question.



Complete each lesson and quiz in the order they appear in the list.

When you complete all of the lessons in each course, take the final exam.

## Taking an Exam

Once you complete all of the lessons and quizzes, you are ready to take the final exam for the course. To start the final exam, click the **Take Exam** link at the end of the lesson list. The final exam is similar to the quiz, but there is no feedback for correct and incorrect answers.

Ultimate Tax University displays the final exam in a new Internet Explorer browser window. Complete the exam in the same manner as the quizzes; review each question thoroughly and select the appropriate radio button for your answer choice. Final exams do not display feedback for your answer choices; however, Ultimate Tax University displays your final score when completed. You can take the final exam up to three times if you do not pass it. If you do not pass the final exam after three tries, you cannot get credit for the course. You cannot take the final exam again after you pass it.

When you finish the final exam, Ultimate Tax University displays your score. You must score at least 70 percent in order to pass the course.

# Viewing the Transcript

---

When you complete each course, your scores are shown in the **My Transcripts** tab. This shows some of the same information that is reported to your Ultimate Tax University administrator when he or she runs reports.

You can see the title of the course, the date you started that course, the date you completed the course, the number of attempts, and the first and best scores.

# Printing a Certificate

---

When you complete a course and pass the final exam, you can print the certificate for that course.

To print the certificate, use the following steps:

1. From the **My Transcripts** page, click **Print Certificate**. Ultimate Tax University displays the course evaluation. While this evaluation is not required in order to print your certificate, the CCH Small Firm Services Online Training Team requests that you complete it in order to assist us in providing an optimal level of service and continued improvement of the course material.
2. If you do not choose to complete the evaluation, scroll to the bottom of the screen.
3. If you do choose to complete the evaluation, select the most appropriate answer to each question. Add comments if there is a particular area that you feel needs specific comment. Click **Submit Evaluation**.
4. Select the certificate you would like to print in the drop-down box. Ultimate Tax University is the default.
5. Click **Print Certificate**. Ultimate Tax University opens the certificate as PDF.
6. Use Adobe's printing tool to print your certificate, or save it to your computer.

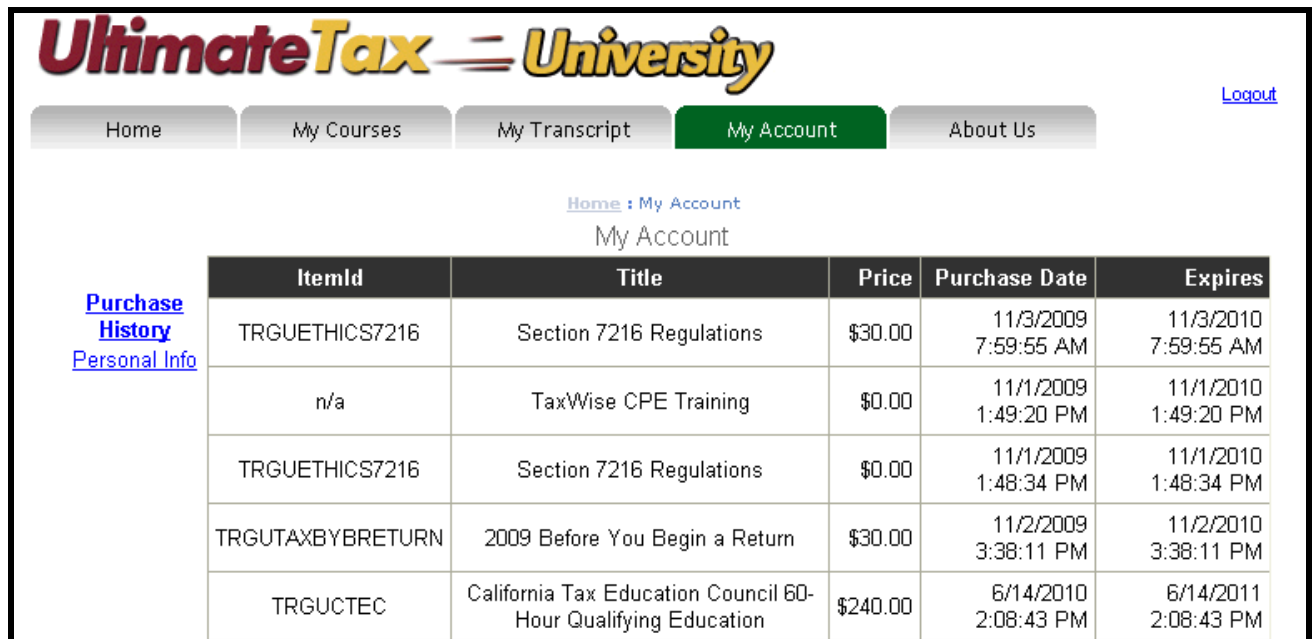
# My Account

---

The next tab in Ultimate Tax University is the **My Account** tab. Here, you can review the courses you purchased and the contact information you entered the first time you logged in to Ultimate Tax University.

# Purchase History

Ultimate Tax University opens the **My Account** tab to the **Purchase History** section. Here, you can see each course you purchased, the price you paid, the date you purchased the course, and the expiration date. This is your receipt for purchase of the course, if you forgot to print the confirmation page or save the confirmation e-mail.



The screenshot shows the Ultimate Tax University website interface. At the top, the logo "Ultimate Tax University" is displayed in a stylized font. Below the logo is a navigation menu with buttons for "Home", "My Courses", "My Transcript", "My Account" (which is highlighted in green), and "About Us". A "Logout" link is visible in the top right corner. Below the navigation menu, the breadcrumb "Home : My Account" and the page title "My Account" are shown. The main content area features a table with the following columns: "Item Id", "Title", "Price", "Purchase Date", and "Expires". To the left of the table, there are two links: "Purchase History" and "Personal Info".

	Item Id	Title	Price	Purchase Date	Expires
<a href="#">Purchase History</a> <a href="#">Personal Info</a>	TRGUETHICS7216	Section 7216 Regulations	\$30.00	11/3/2009 7:59:55 AM	11/3/2010 7:59:55 AM
	n/a	TaxWise CPE Training	\$0.00	11/1/2009 1:49:20 PM	11/1/2010 1:49:20 PM
	TRGUETHICS7216	Section 7216 Regulations	\$0.00	11/1/2009 1:48:34 PM	11/1/2010 1:48:34 PM
	TRGUTAXBYBRETURN	2009 Before You Begin a Return	\$30.00	11/2/2009 3:38:11 PM	11/2/2010 3:38:11 PM
	TRGUCTEC	California Tax Education Council 60-Hour Qualifying Education	\$240.00	6/14/2010 2:08:43 PM	6/14/2011 2:08:43 PM

## Personal Info

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To see the information you entered about yourself, click the **Personal Info** link on the left. If any of this information needs to be adjusted, change it by clicking the **Edit** button and making the necessary corrections.

If you are a CTEC tax return preparer, you **must** enter your CTEC number on this page in order for CCH Small Firm Services to report any CTEC continuing education credits to CTEC. This is an automatic process and is done only for customers with a CTEC number in the system.



The screenshot shows the 'My Account' page of the Ultimate Tax University website. The page has a navigation bar with links for Home, My Courses, My Transcript, My Account (highlighted), and About Us. A 'Logout' link is in the top right corner. The main content area is titled 'My Account' and includes an 'Edit' button. On the left, there are links for 'Purchase History' and 'Personal Info'. The form contains the following fields:

Name	Aaron	Blankenship
Address	123 West Lake	
City	White Plains	
State/Province	New York	
Postal Code	10605	
Company Name	M&G	
Phone Number	(888)888-8888	
Email Address	university.support@cchsf.com	
Enter your CTEC#	A	ex. A123456
Are you a(n)?	<input type="checkbox"/> EA <input type="checkbox"/> CPA <input type="checkbox"/> CFP	

If you are an EA, CPA, or CFP, select the check box at the bottom of the screen to show your professional designation. This helps the CCH Small Firm Services Online Training Team create additional courses to meet your needs.

## Logging Out

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When you are finished using Ultimate Tax University, log out using the **logout** link at the top of the page.

If you have any questions regarding Ultimate Tax University, or suggestions for courses that you would like to see, e-mail [University.Support@cchsf.com](mailto:University.Support@cchsf.com). The Online Training Team will gladly assist you.