

# YOUR TAX OFFICE CHECKLIST

If you are new to the tax preparation industry, follow these steps to ensure you are ready for tax season.

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## TAXSLAYER PRO SOFTWARE

- Contact Technical Support to convert prior year data
- Install prior year programs on any new computers

## INTERNAL REVENUE SERVICE (IRS)

- Apply for EFIN(s)\* (if applicable)
- Renew PTIN (IRS annual requirement)
- Update Form 8633 (if applicable, using e-services)
- Familiarize yourself with tax law changes
- Review current phase out limits
- Know the EITC Compliance Requirements

## BANK

- Complete Bank Application
- Follow up with the bank for approval status
- Order Check/Card stock from your bank
- Familiarize yourself with all bank products and fees
- Complete Bank Compliance Requirement

## STATE

Familiarize yourself with:

- E-filing mandates
- Requirements for filing extensions
- Requirements for filing business returns
- Your state's requirements for bank products

## OFFICE & COMPUTER EQUIPMENT

Perform routine maintenance on computers to include:

- Defragment hard drive (speeds up performance of your computer)
- Clean up start up programs (for a faster computer startup)
- Run Windows Update (to ensure all operating system security updates and service packs are installed on all computers)
- Test printers for use with TaxSlayer Pro
- Update/install Adobe Reader on all computers (Adobe X Reader is recommended)
- Test internet connections (Cable or DSL connection is required to run TaxSlayer Pro. Wireless connections are not recommended)
- Renew subscriptions to anti-virus/firewall software (Exclusions for TaxSlayer Pro may need to be set)
- Test document scanners, barcode scanners and signature pads (for use with TaxSlayer Pro Premium Only)
- Contact TaxSlayer Pro Technical Support for assistance with setting up your software on your network (Network users)

## CLIENTS

- Prepare and mail information to prior year clients
- Create/update business social media accounts
- Prepare email communications

## CONTINUING EDUCATION

- TaxSlayer Pro November Seminar
- Summer IRS Shows
- TaxSlayer Pro Education Portal
- Surgent

## PRODUCT PARTNERSHIPS

Grow your business with our partners:

- SecurelyID
- AMP
- Coverhound
- The Tax Book