

YOUR TAX OFFICE CHECKLIST



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

TAXSLAYER PRO SOFTWARE

- _____ Update My Account
- _____ Contact Sales to complete conversion agreement
- _____ 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 organizers to prior year clients
- _____ Prepare letters/coupons