CROSSLINK®
Professional Tax Software

December Pre-Season Readiness Checklist - EROs

BANK AND IRS TASKS

- ☐ Apply for new EFINs (if applicable) online via e-Services at www.irs.gov/Tax-Professionals/e-services--Online-Tools-for-Tax-Professionals.
- ☐ Register and/or renew PTINs with the IRS online at www.irs.gov/ptin.
- ☐ Register EROs with a bank. To find banking partners with CrossLink visit www.CrossLinkTax.com/customer-resources/Banking-Center.asp.
- ☐ Understand current IRS e-filing requirements by visiting the CrossLink Tax Resource Center at www.CrossLinkTax.com/customer-resources/Tax-Resource-Center.asp.

SOFTWARE TASKS

- ☐ Order CrossLink 1040 Professional Tax Software.
- ☐ Install CrossLink Professional Tax Software by downloading it from the CrossLink Customer Portal (www.CrossLinkTax.com/portal16/support_login.aspx) when it is released. Test the software to ensure full functionality.
- ☐ Familiarize yourself with new CrossLink features and functionality.
- ☐ Set your billing amounts.
- ☐ Setup Protection Plus Audit Assistance in the CrossLink Customer Portal. To learn more visit www.CrossLinkTax.com/customer-resources/protection-plus.asp.
- ☐ Order, install, and test Electronic Signature Pads and Handheld Scanners.

OPERATIONS TASKS

- ☐ Test your computer or office network and upgrade as needed.
- ☐ Test your printers.
- ☐ Prepare your office filing system.
- ☐ Order office supplies.

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PUTTING CUSTOMERS FIRST SINCE 1974

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December Pre-Season Readiness Checklist - EROs continued

TRAINING TASKS

- ☐ Familiarize yourself with tax law changes, the Affordable Care Act requirements for 2015, and preparer compliance by visiting the CrossLink Tax Resource Center at www.CrossLinkTax.com/customer-resources/Tax-Resource-Center.asp.
- ☐ Train your staff on…
  - ☐ Software, Electronic Signature Pads, Handheld Scanners
  - ☐ Tax theory
  - ☐ Office systems and processes

  For more information visit www.CrossLinkTax.com/customer-resources/online-product-and-training-videos.asp.
- ☐ Encourage your staff to follow us on social media for Tax Updates and support messages.

MARKETING TASKS

- ☐ Plan marketing program for existing and new customers.
- ☐ Plan tax season promotions.
- ☐ Update or perform maintenance on store signage.
- ☐ Increase storefront visibility now - keep interior lights on, hang banners and window posters, balloons, etc.
- ☐ Schedule pre-season appointments for prior year customers.
- ☐ Email / text message / postcard / phone blitz
- ☐ Send "What to bring to your appointment" checklist to customers.