



December Pre-Season Readiness Checklist Service Bureaus

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.
- Configure your sub-sites by logging on to the CrossLink Customer Portal at www.CrossLinkTax.com/portal16/support_login.aspx.
- 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.





December Pre-Season Readiness Checklist Service Bureaus continued

TRAINING TASKS

- Ensure you and your EROs are familiarized with tax law changes, the Affordable Care Act requirements for 2014, 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/Learning-Center.asp.

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 your sub-sites to distribute to taxpayers.

