



December Pre-Season Readiness Checklist - EROs

Bank and IRS Tasks

- Apply for new EFINs (if applicable) by completing IRS Form 8633, found at www.irs.gov/pub/irs-pdf/f8633.pdf.
- 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/support/banking_center.asp.
- Understand current IRS e-filing requirements by visiting the CrossLink Tax Resource Center at www.CrossLinkTax.com/support/tax_resource_center.asp.

Software Tasks

- Order CrossLink 1040 Professional Tax Software
- Install and test CrossLink Professional Tax Software when it arrives
- Familiarize yourself with new CrossLink features and functionality
- Set your billing amounts
- Setup Protection Plus Audit Assistance. To learn more visit www.CrossLinkTax.com/features/protection_plus.asp.
- Order [Electronic Signature Pads](#) and [Hand-Held Scanners](#)
- Install and test [Electronic Signature Pads](#) and [Hand-Held Scanners](#)

Operations Tasks

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

Training Tasks

- Familiarize yourself with tax law changes and preparer compliance by visiting the CrossLink Tax Resource Center at www.CrossLinkTax.com/support/tax_resource_center.asp.
- Train your staff on...
 - Software, [Electronic Signature Pads](#), [Hand-Held Scanners](#)
 - Attend a [CrossLink Regional Workshop](#)
 - Tax Theory
 - Office Systems and Processes

For more information visit www.CrossLinkTax.com/support/learning_center.asp.

Marketing Tasks

- Plan marketing program for existing and new customers
- Order posters, postcards, and customer giveaways
- 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

