



## December Pre-Season Readiness Checklist - Service Bureaus

### 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](http://www.irs.gov/pub/irs-pdf/f8633.pdf).
- Register and/or renew PTINs with the IRS online at [www.irs.gov/ptin](http://www.irs.gov/ptin).
- Register EROs with a bank. To find banking partners with CrossLink visit [www.CrossLinkTax.com/support/banking\\_center.asp](http://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](http://www.CrossLinkTax.com/support/tax_resource_center.asp).

### Software Tasks

- Order CrossLink Professional Tax Software
- Install and test CrossLink Professional Tax Software when it arrives
- Familiarize yourself with new CrossLink features and functionality
- Configure your sub-sites by logging on to the CrossLink Customer Portal at [www.CrossLinkTax.com/CrossLink/support\\_login.asp](http://www.CrossLinkTax.com/CrossLink/support_login.asp).
- Set your billing amounts by logging on to the CrossLink Customer Portal at [www.CrossLinkTax.com/CrossLink/support\\_login.asp](http://www.CrossLinkTax.com/CrossLink/support_login.asp).
- Setup Protection Plus Audit Assistance. To learn more visit [www.CrossLinkTax.com/features/protection\\_plus.asp](http://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

### Operations Tasks cont.

- 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](http://www.CrossLinkTax.com/support/tax_resource_center.asp).
- Train your staff on...
  - Software, [Electronic Signature Pads](#), [Hand-Held Scanners](#)
  - Tax Theory
  - Office Systems and Processes
- For more information visit [www.CrossLinkTax.com/support/learning\\_center.asp](http://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 your sub-sites to distribute to taxpayers.