

# 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](https://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](https://www.irs.gov/ptin).
- ☐ Register EROs with a bank. To find banking partners with CrossLink visit [www.CrossLinkTax.com/tax-resource-center/banking-center/](https://www.CrossLinkTax.com/tax-resource-center/banking-center/).
- ☐ Understand current IRS e-filing requirements by visiting the CrossLink Tax Resource Center at [www.CrossLinkTax.com/tax-resource-center/](https://www.CrossLinkTax.com/tax-resource-center/).

### SOFTWARE TASKS

- ☐ Order CrossLink 1040 Professional Tax Software.
- ☐ If using CrossLink Online, ensure you've completed all steps in the Progress Setup Bar for each office within the application.
- ☐ If using CrossLink 1040 Desktop, install CrossLink Professional Tax Software by downloading it from the CrossLink Customer Portal ([https://portal.crosslinktax.com/portal25/support\\_login.aspx](https://portal.crosslinktax.com/portal25/support_login.aspx)). 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 [https://portal.crosslinktax.com/portal25/support\\_login.aspx](https://portal.crosslinktax.com/portal25/support_login.aspx).
- ☐ Setup audit assistance service in the CrossLink Customer Portal. To learn more visit <https://www.crosslinktax.com/auditallies/>.
- ☐ 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.
- ☐ Review your office security plan and make any updates that may be needed. As part of this process, review IRS [Publication 4557](#) (Safeguarding Taxpayer Data) and the NIST [Small Business Information Security – Fundamentals](#) document. If you do not have an office security plan, review [IRS Publication 5708](#) (Creating a Written Information Security Plan for your Tax Accounting Practice) on how to create one.
- ☐ Review the Annual December IRS National Security Awareness Week 2024 News Releases (week of December 2, 2024) for the latest information on how to enhance your online security for the upcoming 2025 filing season.

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### TRAINING TASKS

- ☐ Familiarize yourself with the most recent tax law changes (which includes the changes to the Child Tax Credit and Child and Dependent Care Credit), the recent changes for when a 1099-K must be issued by a Third Party Network such as Paypal or Venmo to an individual, and preparer compliance and due diligence requirements by visiting the CrossLink Tax Resource Center at: [www.CrossLinkTax.com/tax-resource-center/](http://www.CrossLinkTax.com/tax-resource-center/).
- ☐ Train your staff on...
  - ☐ Software, [Electronic Signature Pads](#), [Handheld Scanners](#), [Mobile Apps & Remote Signatures](#)
  - ☐ Tax theory
  - ☐ Office systems and processes
  - ☐ Safeguarding Taxpayer Data which includes what internal controls your staff need to follow.
  - ☐ Have your staff attend our Tax Webinar Series. For more information and to register, visit [www.crosslinktax.com/irs-nationwide-tax-forums/webinars/](http://www.crosslinktax.com/irs-nationwide-tax-forums/webinars/).

### 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.

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