If you are new to the tax preparation industry, or new to e-filing, follow these steps to ensure you are ready for tax season.

**TAXSLAYER PRO SOFTWARE**
- Update My Account
- Contact Sales to complete conversion agreement
- Contact Technical Support to convert prior year data
- Install prior year programs on any new computers

**INTERNAL REVENUE SERVICE (IRS)**
- Apply for EFIN(s)* (if applicable)
- Renew PTIN (IRS annual requirement)
- Update Form 8633 (if applicable, using e-services)
- Familiarize yourself with tax law changes
- Review current phase out limits
- Know the EITC Compliance Requirements

**BANK**
- Complete Bank Application
- Follow up with the bank for approval status
- Order Check/Card stock from your bank
- Familiarize yourself with all bank products and fees
- Complete Bank Compliance Requirement

**OFFICE & COMPUTER EQUIPMENT**
- Perform routine maintenance on computers to include:
  - Defragment hard drive (speeds up performance of your computer)
  - Clean up start up programs (for a faster computer startup)
  - Run Windows Update (to ensure all operating system security updates and service packs are installed on all computers)
  - Test printers for use with TaxSlayer Pro
  - Update / install Adobe Reader on all computers (Adobe X Reader is recommended)
  - Test internet connections (Cable or DSL connection is required to run TaxSlayer Pro. Wireless connections are not recommended)
  - Renew subscriptions to anti-virus/firewall software (Exclusions for TaxSlayer Pro may need to be set)
  - Test document scanners, barcode scanners and signature pads (for use with TaxSlayer Pro Premium Only)
  - Contact TaxSlayer Pro Technical Support for assistance with setting up your software on your network (Network users)

**STATE**
- Familiarize yourself with:
  - E-filing mandates
  - Requirements for filing extensions
  - Requirements for filing business returns
  - Your state’s requirements for bank products

**CLIENTS**
- Prepare and mail organizers to prior year clients
- Prepare letters/coupons