Year-End Checklist

Tax season is right around the corner and as the tax market continues to evolve, it's more important than ever to have a strong year-end process.

Year-end planning doesn't have to be stressful. Use our year-end checklist for a smooth transition. Below is a list of trainings and tools that will help your firm get ready for year end and beyond.

Training and consulting

- ◯ **Year-end update and productivity training for UltraTax CS® and more**

  Get an in-depth look at the latest software enhancements and see how to improve productivity with your CS Professional Suite® software. Learn more and register at **tax.tr.com/yearend**.

- ◯ **New staff training**

  Are you onboarding new staff to ramp up for tax season? Get them up to speed quickly with our training classes. Learn more and register at **tax.tr.com/cstraining**.

- ◯ **Practice Forward**

  Grow your accounting practice and become a next generation firm with high value advisory services. Work with a Practice Forward consultant to take a critical look at your operations and create the big-picture strategy you need to drive your firm's profitability and success. Learn more at **tax.tr.com/practiceforward**.

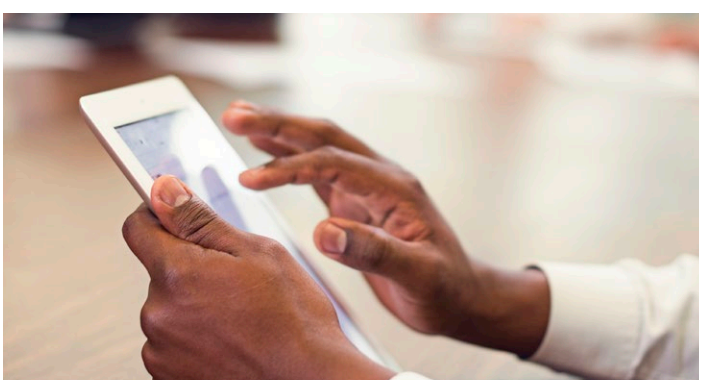
- ◯ **Consulting Opportunities**

  Looking to improve the overall workflow processes in your firm? Or maybe you'd like some help with best practices for optimizing your software? If so, our consulting options could be the perfect fit. Learn more at **tax.tr.com/csconsulting**.

Network seats

- ◯ **Additional network seats**

  Review the number of concurrent users you'll have accessing your software on the network at the same time and add additional seats if needed.



Tax workflow

- ◯ **UltraTax CS add-on tools**

  Year-end is a great time to evaluate your current workflow and see if there are any additional tools that could help make your tax season a little easier. Here are a few additional products that you may want to consider:

  - **eSignature**: Easily gather signatures from your clients online whenever and from wherever it's convenient.
  - **Planner CS®**: Help your clients review their tax strategies and plan for tax reform impact. Provide value-added reporting with our easy-to-use presentation tools and automatically generate TCJA comparison plans for clients exported from UltraTax CS.
  - **ToolBox CS®**: Get anytime access to handy tax and accounting tools like financial calculators, calculating federal forms, IRS flowcharts, timesaving templates, and much more — including a number of TCJA-specific resources.
  - **Source Document Processing service**: Source documents can be painful to manage, but our Source Document Processing service provides an easy way to scan, label, and organize documents and even transfer them directly into UltraTax CS.
  - **Fixed Assets CS®**: Simplify asset and inventory management with this comprehensive, yet easy-to-use tool that shares data directly with UltraTax CS. Recently updated to include all applicable calculation changes associated with the TCJA, with additional schedules to be added before year end.
  - **UltraTax CS Client Organizer**: Save time with data collection by having your clients complete their tax info online using a customizable questionnaire that imports seamlessly into UltraTax CS.

  Did you know? With UltraTax CS data mining capabilities you can quickly and easily identify which of your clients are impacted by the TCJA and in what ways.

  Want to learn more about these integrated tools?
  Visit our website at **tax.tr.com/taxasset** or contact your sales representative at **+1 800 968 8900**.

- ◯ **Don't forget the IRS e-file application summary!**

  As you know, IRS e-filing guidelines require preparers to be an authorized e-file provider in order to e-file returns.

  To be prepared for the upcoming tax season, if you haven't already you'll need to provide us with a copy of the IRS e-file application summary from your e-services account.

  Important: If you have more than one EFIN number associated with your account, we'll need an IRS e-file application summary for each EFIN number.

  Please email the summaries to **efincertificate@tr.com**, and don't forget to include your Firm ID in the subject line. You can find more information on how to generate the summary at **tax.tr.com/find-efin**.

Tax research, guidance, and learning

Checkpoint Edge

Checkpoint Edge™ is an advanced research tool for tax and accounting professionals that uses artificial intelligence, cognitive computing, and machine learning to provide quick and trustworthy information. Spend less time searching, and more time with your clients. Learn more at **tax.thomsonreuters.com/en/checkpoint/edge**.

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Secure client collaboration and websites

NetClient CS®

Take your tax services to a whole new level with the ability to securely share financial documents, tax returns, client software, and more online with your clients at any time. Learn more at **tax.tr.com/netclientcs**.

WebBuilder CS®

Provide excellent client service and attract prospective clients with an engaging website. Our website design and hosting offering makes it easy for you to create and customize your site with meaningful content and a variety of add-ons. Learn more at **tax.tr.com/webbuildercs**.

Working in the cloud

Virtual Office CS®

If you're faced with having to upgrade your servers or other hardware this year, you may want to consider a move to our proven Virtual Office CS cloud computing, which can help eliminate IT hassles. Learn more at **tax.tr.com/virtualofficecs**.

Support

Did you know that you can buy an unlimited model for our support help? Instead of pay-as-you-go, we offer a monthly subscription fee option, which many firms find beneficial for worry-free cost planning. Talk to your representative today to learn more.

Payroll services

Additional payroll clients for Accounting CS® Payroll

If you process live payroll in your firm, now's a good time to add any additional payroll clients/bundles you might need.

E-Filing 940/941 forms

If you e-file payroll forms, you might want to look at our unlimited 940/941 e-filing pricing options to see if you can take advantage of cost savings. To see if you're at the breakeven point, simply follow these steps:

- Log in to the **My Account** section of our website
- Select **My Orders & Payments**
- Select **PRP/ELF Report**
- Select the **Breakeven Report**

Partnering with myPay Solutions®

If you have some tough payroll clients you'd rather not have to process, or if you'd like to reap the benefits of offering payroll without doing the work, you might want to consider our myPay Solutions processing service. Learn more at **tax.tr.com/mypaysolutions**.

Firm and workflow management

Workpapers CS™

With the online collaboration in Workpapers CS, it's never been easier to manage documents and data from a variety of sources — and the built-in trial balance capabilities and reporting tools make tax workflow a breeze. Learn more at **tax.tr.com/workpaperscs**.

Practice CS® timekeepers and modules

If you're using Practice CS for firm management, year end is a good time to verify if any additional timekeepers are needed, and to take advantage of additional functionality with these modules (if not already owned):

- **Project Management**: Use dashboards to monitor every detail of your firm's projects in real time.
- **Client Management**: Collaborate and view real-time client activity from a single location.
- **Staff Management**: Manage staff, benefits, targets, and schedules from a single location.

Learn more at **tax.tr.com/practicecs**.

We hope you'll find this checklist useful as you navigate your year-end processes. If there's anything we can do to help you prepare for tax season, please reach out to your representative or contact us at + 1 800 968 8900.

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