

Tax Preparation Outsourcing

Onboarding Checklist

Your Step-by-Step Guide to Seamless Integration with Countsure

Welcome to Countsure's Tax Preparation Outsourcing Service. This comprehensive checklist will guide you through the onboarding process to ensure a smooth, efficient, and secure integration with our team. Please complete each section before your scheduled kick-off call to maximize the value of your partnership with us.

1. Pre-Engagement Preparation

- Define Scope of Services:** Identify which tax return types you need support with (1040, 1065, 1120, 1120-S, 1041, 990, 706, etc.)
- Estimate Volume:** Determine approximate number of returns per tax type for the upcoming season
- Establish Timeline:** Share your firm's key deadlines and priority dates for tax season
- Assign Internal Contact:** Designate a primary point of contact from your firm for communication
- Review IRS Compliance:** Ensure you understand IRS Section 7216 requirements and taxpayer consent protocols

2. Required Documentation

- Prior Year Tax Returns:** Digital copies of all clients' last year's completed tax returns (all entities)
- Tax Software Backup Files:** Backup files from your tax preparation software, if applicable
- Source Documents:** Organized digital copies of W-2s, 1099s, K-1s, receipts, and all supporting tax documents
- Tax Organizers:** Client-provided tax organizers with completed questionnaires and data
- Engagement Letters:** Signed engagement letters from clients (if required for your firm's process)
- Special Instructions:** Any client-specific notes, preferences, or historical tax strategies

Note: All documents should be provided in digital format (PDF preferred). Please organize files by client & return type for faster and seamless processing.

3. Software & System Access

- Tax Software Access:** Provide secure VPN or Remote Desktop (RDP) credentials for your tax software
- Software Platform:** Confirm which platform you use: UltraTax CS, CCH Axcess, Lacerte, Drake, ProConnect, ProSeries, ATX, GoSystem, etc.
- Practice Management Tool:** Grant access to TaxDome, Canopy, Karbon, or your workflow management system (if applicable)
- Document Sharing Setup:** Configure secure file sharing via SharePoint, Dropbox, Box, Google Drive, or your preferred portal
- Communication Channels:** Set up access to Email, Slack, Microsoft Teams, or your preferred communication platform
- Login Credentials:** Create user accounts for assigned Countsure team members with appropriate permissions

Security Note: Countsure follows a Zero Data Footprint policy. Our team accesses your systems remotely - no client data leaves your secure servers.

4. Communication & Workflow Setup

- Schedule Kick-off Call:** Book your initial onboarding meeting with your dedicated Account Manager
- Define Communication Protocol:** Establish preferred communication methods (email, Slack, Teams, phone) and response times
- Set Review Process:** Agree on your firm's internal review and approval workflow for completed returns
- Establish Naming Conventions:** Share your file naming and organizational structure preferences
- Configure Task Management:** Define how tasks will be tracked, assigned, and updated in your system
- Set Up Status Reporting:** Determine frequency and format for progress updates and status reports

5. Quality & Compliance Requirements

- Taxpayer Consent Forms:** Ensure IRS Section 7216 consent is obtained from all clients (if not already on file)
- Firm Standards Document:** Share your firm's quality standards, review checklists, and compliance requirements
- E-file Authorization:** Clarify who will handle e-filing and signature authorization processes
- Error Resolution Protocol:** Define the process for handling questions, discrepancies, or required corrections
- Data Security Agreement:** Review and sign Countsure's data security and confidentiality agreement
- Engagement Terms:** Finalize and execute the Master Service Agreement (MSA) with Countsure

6. First Batch Preparation

- Select Pilot Returns:** Choose 3-5 representative returns for initial test batch (mix of complexity levels)
- Prepare Sample Returns:** Gather all required documents and information for your pilot batch
- Review Turnaround Times:** Confirm expected delivery timeline for different return types
- Schedule Training Session:** Arrange time for your team to understand the outsourcing workflow and handoff process
- Prepare Questions List:** Document any client-specific nuances or technical questions for the kick-off call
- Set Success Metrics:** Define how you'll measure success (accuracy, turnaround time, communication, etc.)

Next Steps

Once you've completed this checklist, you're ready to begin your partnership with Countsure! Your dedicated Account Manager will guide you through the kick-off call where we'll finalize all technical details, answer your questions, and launch your first batch of returns. Our 4-eyed review process and 24-48 hour turnaround times will ensure you experience the quality and efficiency that our clients have come to expect.

Need Help?

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