

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Even an experienced Olympian wouldn't run a marathon without staying in shape through the year and then stretching out for the event. And you wouldn't plan a road trip from New York to California without having your mechanic perform a tune-up and thoroughly inspect your car.

Well, that's essentially what you're doing if you jump into tax season without testing your computers, printers and other hardware and software. The addition of new PCs, printers and programs can affect the ability of networked systems to operate efficiently, and even non-networked stand-alone systems are not immune to glitches that can put a stop to work processes.

Here are a few of the primary areas of concern when preparing your office technology for tax season. If you haven't

already done so, perform these

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Ensure that all of your computers work and that they work together.

Firms that ramp up during tax season by adding temporary workstations are particularly vulnerable to problems resulting from old operating systems and software conflicts. New software and hardware constantly evolve and change the way they work with other programs, so just because the computer worked last year doesn't mean it will this year. So when you dust off the old computer in the closet, be sure to download the appropriate patches and service packs from www.windows.com, and test all vital programs and printing functions.

Even when the software is properly functioning and a workstation is working adequately, old PCs can limit productivity due to other factors such as slower processors, less

memory or lower storage capacity

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Tax Software

Load and run your tax software immediately. The final versions of tax software usually ship in the last week or two of the year, and may include updates into the first months of the year, depending on tax legislation. Loading it immediately and testing it from all workstations that will access it ensures not only that the program works and does not conflict with other programs on the system, but that your firm is using the version that most accurately reflects changing tax law.

The key areas to check out include the printing functions and communications/online functions. This can also be turned into an additional training opportunity for your staff.

Bandwidth

This has nothing to do with

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Employees using computers, you might notice a significant slowdown in your Internet connectivity. The amount of concurrent data flow your connection can allow is called bandwidth, and it is shared by everyone in your office. You need online connectivity for all of your staff, so if the drain is significant, consider adding another DSL or cable line or, if your firm ramps way up and is located in a major metropolitan area, you may be able to share a T-1 line.

Printers

Even with the move to a 'less paper' office, printers are still a workhorse in a tax firm. Whether you've added a new printer or not, your tax software changes every year so make sure that all printers are compatible. While you're at it, you might consider adding

a printer or two to make sure

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Every firm must have a backup system. If you lose client data at this time of year, there may not be a next year. Numerous methods are available for backing up data, from online solutions, to removable hard drives, tape drives, CDs and DVDs. What's the best one? The one you will use religiously. Make sure that it works before tax season and, if you've been a little less than faithful to the routine during the slower months, get back on track now.

Security

Is your firm a Brinks truck or a Yugo? What would you rather have protecting the cache of client SSNs, bank account numbers and personal data you collect? Client data security is a year-round concern but needs to be highlighted

during tax season when an

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Develop a recycling policy
for trash-bound waste, or
use a shredding service provider.

If you have the ability and
you think it's prudent,
perform background checks
on temp staff and custodial
staff.

Mr. O'Bannon is the
technology editor for The
CPA Technology Advisor. He
can be reached at isaac.obannon@cygnuspub.com.

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved