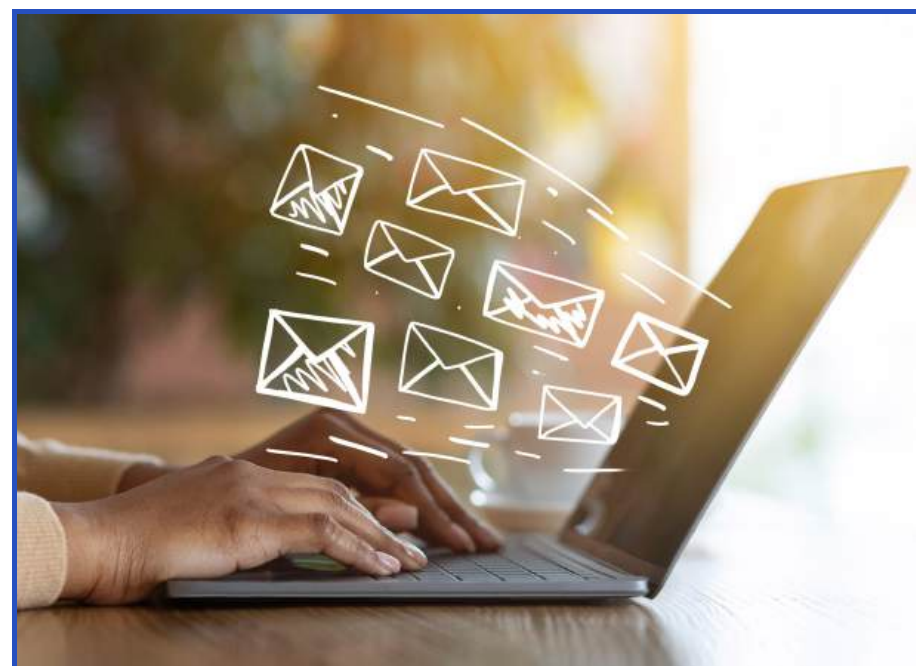


Ways to Get the Most Out of Cloud Tax Software

1. Set Up Access Controls Before You Need Them

Role-based permissions ensure each staff member sees only what their job requires. MFA, mandated by the IRS for professional tax software, closes the credential gap that passwords alone leave open. Review both settings at the start of each tax season.



2. Replace Risky Email Habits With Built-In Tools

Regular email wasn't designed for sensitive client data; a misdirected attachment risks a breach and IRS violations. An integrated portal concentrates communication into one encrypted channel and links every document directly to the correct client file.

3. Don't Ignore the Small Things That Keep You Compliant

Cloud platforms update more frequently than desktop software; some reflect new filing requirements, others improve security. Installing updates promptly and confirming e-signature records beforehand prevents compliance problems from surfacing during peak season.



4. Build Workflows That Hold Up During Peak Season

Cloud software lets multiple preparers work the same return simultaneously. A defined rotation built in slower months, data entry, complex review, and final sign-off ensures the team knows their roles when volume spikes and there's no time to improvise.

5. Train Your Team Before the Pressure Hits

Features go unused when staff never learn they exist. Revisit training every season as software updates and staff changes accumulate, staff who understand why MFA and portal requirements exist are less likely to find workarounds that defeat their purpose.



6. Why These Habits Make the Difference

Offices that build access controls, replace email habits, stay current on compliance, build peak-season workflows, and train staff thoroughly get more from their cloud platform than those that treat the switch as a simple software swap. Processes determine value.

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