Checklist:

Get Ready for Tax Season

SmartVault

This practical checklist gives both admins and employees a clear roadmap to get your firm prepared and ready to win the busy season.

1 Schedule a Workflow Consultation

Get ahead of busy season with a strategic consultation that goes way beyond basic setup to maximize SmartVault's full workflow potential for your firm. Book your one-on-one Customer Success session to fine-tune workflows, explore integrations, and get to know SmartRequestAI.™

SCHEDULE NOW

2 Audit Users

- [ ] Purchase User Licenses (Admin, Employee, Seasonal)
- [ ] Add Users to SmartVault Account

3 Update Client List

- [ ] Add New Clients
- [ ] Invite New Clients
- [ ] Link Connected Clients

4 Refresh Skills

- [ ] Join Our Tax Readiness Webinars
- [ ] Complete Tax Season Readiness Course
- [ ] Add SmartVault Academy Certificates to LinkedIn
- [ ] Schedule a 1:1 SmartHour

5 Get Started...

- [ ] Add a Tax Year 2025 Folder to Each Client Vault
- [ ] Share Guest User Education Resources with Your Clients

Click on each task for a detailed step-by-step guide.

+ FAQs: Daily Workflows

- Requesting and Receiving Docs
- Printing Tax Returns into SmartVault
- Sharing Tax Returns with Clients