

Tax Season Readiness Self-Assessment

CAN YOUR SYSTEMS HANDLE PEAK PRESSURE WITHOUT HEROICS?

This checklist is designed to help accounting and finance teams quickly assess whether their technology environment is prepared for tax-season stress: **higher volume, tighter deadlines, and more people accessing critical systems at once.**

Infrastructure

Elasticity



Can your environment absorb spikes in demand without degradation?

- We can add users or capacity without downtime
- Performance remains stable during peak filing periods
- Resource limits are monitored in real time
- We've stress-tested the environment under peak-season conditions
- Capacity planning is intentional, not reactive

⚠ **RED FLAG:** Performance depends on "hoping nothing else goes wrong."

Remote & Seasonal Staff Access



Can the right people access the right systems—securely and consistently?

- User access is role-based and documented
- Temporary or seasonal users are easy to onboard and offboard
- Remote access is secure and reliable
- No shared credentials or workaround logins are required
- Access reviews happen at least once per season

⚠ **RED FLAG:** Access decisions are made ad hoc during crunch time.

Application Performance Under Load



Do your critical apps perform when everyone needs them at once?

- Core applications remain responsive during peak hours
- File locks, latency, or crashes are rare under load
- Application dependencies are clearly understood
- Performance issues are visible before users complain
- Teams know which issues are "normal" vs critical

⚠ **RED FLAG:** Slowdowns are expected and tolerated during tax season.

Backup & Recovery Readiness



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Support & Escalation Readiness



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Could you recover quickly if something fails at the worst moment?

- Backups run automatically and are verified
- Backup frequency matches business criticality
- Recovery time objectives (RTOs) are defined and realistic
- Restoration has been tested—not just assumed
- Data integrity is validated post-backup

 **RED FLAG:** “We think we’re backed up” is the best answer available.

When something breaks, is ownership clear and response fast?

- Support roles and escalation paths are clearly defined
- After-hours and peak-season coverage is planned
- There is a single source of truth during incidents
- Teams know when to escalate vs troubleshoot
- Post-incident reviews actually happen

 **RED FLAG:** Resolution depends on a few key people being available.

FINAL REFLECTION

Answer honestly:

- Where did your team rely on heroics last tax season?
- Which risks are accepted—not managed?
- If pressure increases next year, will your systems hold?

Tax season doesn’t break systems.
It reveals how they were designed.

PLANNING UPGRADES BEFORE NEXT SEASON?

Let’s talk about how Summit
can get your systems ready for go-time.

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