

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



1

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



2

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



3

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



4

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.

Support & Escalation Readiness



5

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?

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can get your systems ready for go-time.

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