

THS Co-Pilot Getting Started Checklist

Recommended Date: January 9th

Check out [Taxhelpsoftware.com/copilot](https://taxhelpsoftware.com/copilot) for further instructions with short videos.

- Import new clients into THS.
- Perform a Bulk Transcript Request on all taxpayers in THS.
 - Get transcripts to create action plans (new users may not get any transcripts until 8821/2848 submitted and approved).
 - Determine which taxpayers need an 8821 or 2848 submitted.
- Create 8821/2848 for each client where your CAF access does NOT extend through at least 2023.
- Generate pre-completed THS Account Tracking engagement agreement.
- Run a THS Issues & Opportunity Report and a First Time Penalty Abatement Report.
- Use the results from the Issues & Opportunity and First Time Abatement Report to address the issues and opportunities and create client action to client's folders.
- Request transcripts once a week and monitor for any changes to Taxpayer Accounts through the THS dashboard and account changes screen.