



Personal Electronic Device Policy

Tax-Aide volunteers cannot use personal electronic devices for the purposes of preparing or e-filing tax returns. Volunteers may only use Tax-Aide-provided and registered devices to access taxpayer information. AARP Foundation Tax-Aide will supply volunteers with permitted devices. Personal (non-Tax-Aide) devices are only permitted for use when completing approved tax software training off-site.

Volunteers are not permitted to use personal electronic devices to access active/real taxpayer data in a live/production environment. Further, volunteers may not connect personal computers, laptops, MacBooks, Chromebooks, tablets, and/or phones to any dedicated network or WiFi connection used for tax preparation. It is also imperative that personal electronic devices remain physically separated from Tax-Aide-provided devices at Tax-Aide site locations.

No exceptions will be made to this policy. Volunteer leaders are expected to file an incident report if it appears this policy is violated.

This policy is focused on all iterations of personal devices (devices owned by volunteers & prospective volunteers). Site-owned devices will remain in use in the program as well as remain eligible to connect to Tax-Aide routers/networks. There is no change to site-owned devices usage policy.

See the table below for clarification on allowable and non-allowable usage.

Functions on Personal Devices (Personal computers, laptops, MacBooks, Chromebooks, tablets, & phones)	Allowed	Not Allowed
Tax Preparation		X
E-Filing		X
Fixing "Rejects"		X
Tax Website Report Generation		X
Connect to Tax-Aide Site Networks		X
Setting Tax Software Administrative Permissions		X
Training and Certification	X	
Volunteer Portal	X	
Web-based research performed off-site	X	
Administrative Work (e.g., committee work & volunteer management activities not involving real taxpayer data)	X	