



Security Best Practices

Security Best Practices:

- I. Passwords
- II. Internet Browser Usage
- III. Unfiled Returns
- IV. User IDs

I. Passwords: Dos and Don'ts

Do: Store passwords and user IDs in a smartphone only if it's password protected and secured at all times.

Do: Share passwords with authorized Tax-Aide volunteers via text only if the contact is verified.

Do: Use passwords that are complex and difficult to guess.

Don't: Write down passwords and user IDs and display at your computer or workspace.

Don't: Write down passwords and user IDs and store them in your badge holder.

Don't: Send passwords and user IDs to another Tax-Aide volunteer via email.

II. Internet Browser Usage

a. Select a browser.

Avoid using Internet Explorer in your work at Tax-Aide because:

- Internet Explorer often doesn't work well with other programs and is outdated.
- You can't access the Volunteer Portal using Explorer.
- Tax-Aide and the tax software vendor recommend using Google Chrome, which is the default browser on Chromebooks.

b. Limit windows.

While it's tempting to leave multiple windows open while preparing returns, this actually slows down your computer. By keeping open windows to a minimum, you'll prepare returns more efficiently.

III. Unfiled Returns

The consequences of unfiled returns are significant and include:

- Penalties that cost the taxpayer money.
- Harm to the Tax-Aide reputation and the trust we've built with taxpayers.

Our goal is to account for every single return that's started at a site each season. To avoid missed returns, always verify each return has been **sent and acknowledged**. Additionally, a **weekly comparison** of the following items can help avoid unfiled returns:

- Taxpayer Sign-In Logs
- Site Activity Logs
- Federal and State Acknowledgements
- Tax Software Management Reports

IV. User IDs

Deactivating user IDs at the end of the season is a good practice because:

- It ensures volunteers don't use tax preparation software at home.
- It prevents volunteers from accessing the tax software or sharing access with others.

Generally, the District Coordinator (DC) will maintain an active user ID to manage any taxpayer issues. Moving completed returns to a new user ID, such as "Completed" or "EOS" (End of Season), after they're acknowledged can prevent accidental access to the returns later. Access can be restricted to only the Local Coordinator (LC) and/or Electronic Return Originator (ERO).