

**Date: February 21, 2014**

**To:** All Volunteers for AARP Foundation Tax-Aide (with a valid email address in VMIS)

**From:** Marcy Gouge, Assistant National Director, AARP Foundation Tax-Aide

**Subject:** *CyberTax* TY2013-05: **Reminder to secure Taxpayer financial data at sites**

Please be advised we are aware that some of you may not be receiving *CyberTax* messages. While we are working on this problem; we ask that you regularly check the Volunteer ShareNet for *CyberTax* messages “*General Program Communications>CyberTax Messages*” and that volunteer leaders send, if necessary, *CyberTax* messages to volunteers who are not receiving them. The solution to this problem may require a whole different process or software for sending email with large distribution list; we are pursuing all options.

Leaders and volunteers are reminded that it is critical that they do their part to ensure that taxpayer information is secure at all times at sites. This includes concerns regarding taxpayers having the ability to overhear conversations about financial issues, or to see computer screens because of the way that the site is set-up.

In addition, technology (such as cell phones with a zoom) provide the ability to quickly capture a picture of financial documents before anyone is aware of what is being done. Volunteers must be vigilant to watch for situations where financial data could be vulnerable to theft.

Guidance for all Volunteers:

- Look carefully at the site set-up and arrange computers in a design that does not allow taxpayers to see screens. Remind volunteers to keep their voices low, and put sufficient distance between tables to keep conversations private.
- Never leave a computer screen open to a return when you step away from the table. Always minimize the screen (or return to a screen without taxpayer’s data) if you leave even for a minute.
- Never leave taxpayer documents or a printed return in an area where other taxpayers could be close enough to observe or take a picture.
- Never print documents in a room away from the preparation site, and retrieve documents from printers immediately to prevent mix-up with another taxpayer’s documents.
- Although it might be appropriate for taxpayers to use their cell phones while they are waiting, watch for cell phone usage when they are in a tax preparation area and insist that taxpayers put cell phones away.
- If you suspect that a picture has been taken of taxpayer documents, you might need to ask the taxpayer to delete any pictures taken, saying “please delete your picture—it makes others uncomfortable if pictures are taken in here.”
- If you hesitate to approach a taxpayer because of safety concerns, immediately call the police for assistance.
- Intervene immediately to tell a taxpayer to leave an area where they should not be standing or looking.
- If something suspicious happens, advise the Local Coordinator or Shift Supervisor, and make quick notes as to what you observed to keep your memory fresh. File an Incident Review report if the circumstances warrant.

Questions about this *CyberTax* should be sent to David Alexander at [dalexander@arp.org](mailto:dalexander@arp.org)