

**Quality Site Requirement Alert (QSRA) - 2011-04**  
**March 8, 2011**

**QSR # 10 Security, Privacy, and Confidentiality**

**Purpose:** This QSRA reemphasizes the guidance for ensuring taxpayer data is protected at all times while the taxpayer is at the site as well as after the taxpayer leaves with their tax return.

**VITA/TCE Policy:** Each of our volunteer sites is expected to adhere to the guidance in **Publication 4299, Privacy and Confidentiality**. This ensures that the confidentiality of all taxpayers is guaranteed so that the public trust is protected, which is of utmost importance to IRS. **The sites are expected to arrange assistance areas to prevent others from easily overhearing or viewing information under discussion. Once the taxpayer has left, volunteers and sponsors must ensure the individual information provided during return preparation is protected at all times. Do not leave the site unsecured.**

Each site is expected to implement a process to ensure information is adequately protected at all times. The process should include, but is not limited to, the following:

- Ensure that the information provided during the course of tax return preparation is under the care of volunteers at all times.
- Use locked storage. Keep devices (i.e. diskettes, CDs, flash drives, pen drives, key drives, thumb drives, etc.) containing taxpayer information secure.
- Label and account for the devices.
- Secure the equipment used for electronic tax return preparation and filing.
- Use passwords to prevent unauthorized access to the computer and software.
- Ensure portable equipment is under the care of a volunteer at all times.
- Use limited or controlled access locations for storing equipment.
- Guard equipment connected to the Internet with virus protection software.
- Ensure information is not accessible to general computer users who share equipment.
- Use data encryption processes when available to secure data stored on computers and on back-up devices.
- Ensure computer settings do not store passwords and any other key information that could provide access to information on the computer.
- Record the make, model and serial number of all computer equipment used and keep in a secure location.

For more information, refer to:

- Publication 4299, *Privacy and Confidentiality*
- Publication 1084, *IRS Volunteer Site Coordinator's Handbook*

More information is available at [www.irs.gov](http://www.irs.gov). If you have any questions please discuss with your site coordinator, email [partner@irs.gov](mailto:partner@irs.gov).

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**Thank you for volunteering to serve your community and for your dedication in  
providing  
Top Quality Service!**