



## Working Virtually: Protecting Tax Data at Home and at Work

*A five-part series from the IRS and Security Summit partners*



### Make a plan for protecting data and reporting theft

**Part 5** of Security Summit tips for tax professionals

Federal law requires tax professionals to have a written information security plan. It's also recommended that practitioners create an emergency response plan should they experience a data theft. Contacting the IRS is step one in the plan to quickly protect tax professionals and their clients.

#### Security plan must meet Federal Trade Commission requirements

- The law requires all “professional tax preparers” to create and maintain a written information security plan that is appropriate to the firm’s size and complexity.
- In addition, the information security plan must be appropriate to the nature and scope of the company’s activities and the sensitivity of the customer information it handles.
- Tax professionals working from home must protect taxpayer data just as they would in an office setting.

#### Report Data Thefts

- Tax professionals who experience a data theft should report the crime to the IRS immediately so actions can be taken to protect taxpayers – and the firm. They should immediately report it to their **local IRS Stakeholder Liaison**.
- They should also email the Federation of Tax Administrators at **StateAlert@taxadmin.org**
- More information is at **Data Theft Information for Tax Professionals**.

[www.irs.gov/securitysummit](http://www.irs.gov/securitysummit)