



Computer Loan Program Welcome Package



**Coming together to strengthen communities
through taxpayer...**

- Education and Awareness
- Return Preparation
- Asset Building

Learn more: **[www.irs.gov/Tax volunteers](http://www.irs.gov/Tax%20volunteers)**

**THANK
YOU!!**

The **VITA** and **TCE** programs would not exist without partner and volunteer commitment and support. You are key to its continued success. **Thank you** for your participation and for the many hours you contribute willingly to the program.

Table of Contents

Thank You Message
Feedback Document

Overview.....	1
Welcome	1
Timeline	1
Brookhaven Equipment Depot (Depot).....	2
Equipment Use	2
Inappropriate Use	2
Allocation of Equipment	3
Communication	3
Receipt of Equipment	4
Upon Receipt.....	4
Property Loan Agreement (PLA)	4
Packing Material	4
Split Shipments	4
Getting Started	5
Charge the Battery.....	5
Verify the Contents	5
Problem Reporting and Assistance	6
General	6
Computer Problems	7
Printer Problems	7
Tax Law.....	8
Tax Preparation Software	8
Security	9
General	9
Passwords	9
Protection of Client’s Privacy.....	9
Protection of Equipment.....	10
Alert	10
Use of Wireless Technology.....	11
Data Encryption	11
Disk Encryption.....	11
Recovery.....	12

Table of Contents (continued)

Operation	13
Helpful Files	13
Network Connection.....	13
Printer Cartridges	13
Location of Print Drivers	13
Networking	14
Virus Software.....	14
Virus Software.....	15
Internet Service Provider Software.....	15
Peer-to-Peer File Sharing –Know the Risks.....	15
Other Software.....	16
Return of Equipment.....	17
Printers	17
Laptops – Return by May 15	17
Laptops – Data Deletion	17
Laptops – Missing Boxes or Shipping Labels	17
Laptops – Packing for Shipment	18
Laptops – One Last Check	18
Laptops – Depot Address.....	18
Laptops – UPS Pickup.....	18
Exhibits.....	19
Exhibit 1 Property Use Agreement	20
Exhibit 2	
Procedures for Deleting Data on IRS Computers.....	.22
Deletion of Software on IRS Computers22
Exhibit 3 Packing Instructions23
Exhibit 4 Equipment Return Notice24
Exhibit 5 Checklist for Returning Laptops.....	.25

Overview

Overview

IRS (Internal Revenue Service) loans computers and printers to its partners and their volunteers involved in the VITA (Volunteer Income Tax Assistance) and TCE (Tax Counseling for the Elderly) programs. The equipment loaned:

- Promotes electronic filing (e-file);
- Improves return accuracy; and
- Facilitates a service the low-income and elderly desire.

Welcome

As a partner or volunteer in the VITA or TCE programs you are designated to receive this equipment. This document provides information to help you understand the program and your responsibilities, the equipment operations, and the help available.

For additional information on VITA and TCE, [visit www.irs.gov](http://www.irs.gov) where you'll find Web pages created specifically for partners and volunteers. These pages are your one-stop resource to help you service taxpayers in your community. Go to www.irs.gov/irs-tax-volunteers.

Thank you for your participation in the programs. You make the difference!

Timeline

- March – Stakeholder Partnerships, Education and Communication (SPEC) will issue instructions to partners (for return of equipment)
- March - April – SPEC will solicit partner feedback to improve the quality of loaned equipment
- April - mid May – Partners will return equipment
- May - June – SPEC will consider partner feedback for possible implementation
- June - July – SPEC will solicit equipment orders – first orders due early July
- July - December - Partners/territories will confirm orders
- August - January - Depot will ship computers
- August - April - Partners should submit signed Property Loan Agreements (PLA) as soon as all computers are received
- July (current year) - June (following year) - SPEC will solicit and secure signed PLAs on printers

Continued on next page

Overview, *continued*

Brookhaven Equipment Depot (Depot)

The Brookhaven Equipment Depot is responsible for readying laptops for use annually. They provide a valuable service to the program by:

- Maintaining the agency's inventory control;
- Loading a new image (operating system);
- Packaging and shipping the computer; and
- Providing phone or e-mail assistance for laptop hardware issues.

Equipment Use

The equipment is loaned to support the VITA and TCE programs. As such, use is restricted to preparation and filing of electronic tax returns and related program activities:

- Training and educating volunteers and taxpayers about individuals' rights and responsibilities;
- Reaching out to taxpayers to inform them of the services of the volunteer organization;
- Promoting activities to assist the volunteer organization in increasing its ability to deliver related tax matters or services without the direct involvement of IRS; and
- Administering the activities of the volunteer operation as they relate to volunteer electronic tax return preparation and filing.

Inappropriate Use

Equipment may not be used for:

- Commercial purposes – One of the cornerstones of the VITA and TCE programs is FREE return preparation for low-income and the elderly. No fee may be collected for volunteer services associated with return preparation.
- Games – Equipment is loaned for activities associated with the VITA and TCE programs. Installation of game software is prohibited. It does not support the program.
- Collateral, exchange or sale – While we do loan equipment for use in the VITA and TCE programs, it remains the property of Internal Revenue Service. It may not be swapped for other equipment, sold for personal gain or used as collateral.
- Personal use – Computers should not be used for personal business.

Continued on next page

Overview, *continued*

Allocation of Equipment

With limited resources the allocation of equipment must be balanced with program growth and audience needs. Three distinct processes exist for the distribution of equipment:

- Printers are controlled and distributed by the local IRS-SPEC office. They review past and anticipated performance against requests to place printers where they will provide the greatest benefit to our programs.
- Local policy determines whether printers will be loaned for more than one filing season.
- Computers are maintained and distributed by the Depot. There are two methods in determining where the computers are placed:
 - Local IRS-SPEC office determines to whom they will be loaned in the VITA and TCE non-AARP program. Again, they review past and anticipated performance against requests to place where they will provide the greatest benefit to our programs.
 - The National AARP Tax-Aide Program determines to whom they will be distributed within their program. Annually AARP Tax-Aide and IRS negotiate the number of computers that will be loaned.

All computers are returned to the Depot annually after filing season.

Communication

IRS will communicate with you via email using two methods.

- Emails are sent on our behalf by UPS.com providing information on shipment and the expected delivery date.
- Emails are sent from www.irs.gov when responding to an inquiry by you or to confirm information on a piece of equipment for inventory validation.

Please check your SPAM and security settings on your personal computer and adjust if necessary to allow receipt of communications from UPS.com and www.irs.gov.

Receipt of Equipment

Upon Receipt

Packing List (PL) – **Within 20 days of receipt**, please verify the information on the PL is accurate. It is critical that we know of any problems with the equipment or the paperwork soon after shipment. Compare the IRS bar code and serial number for each computer. Please contact your local Relationship Manager if there are any discrepancies.

Property Loan Agreement (PLA) Form 13632

Your local SPEC RM should send you a PLA within two weeks of receipt of equipment. The PLA is to document the loan of equipment and communicate the conditions of the loan. Please verify the equipment received matches the PLA within **20 days** of receipt of the PLA. Make any needed changes to the PLA, sign and return the PLA to your local SPEC office. A blank PLA is provided in Exhibit 1. Be sure to store your PLA separately in case your computer is lost or stolen and you need to provide information to the police.

Packing Material

Save the box, packing material and the UPS return label (included with the shipment). Consider attaching the UPS return label to the box immediately upon receipt of equipment to prevent misplacing it later. All of these will be used to return the equipment after the filing season is complete.

Split Shipments

Expecting more equipment? The Depot stages shipments based on the number of computers involved. Because of this, an order for three computers may ship on Monday, an order for two computers may ship on Wednesday and an order for one computer may ship on Friday. For instance, if you are expecting five computers, one box (three computers) may ship on Monday, and one box (two computers) may ship on Wednesday. If you receive the three computers, wait five business days before contacting the Depot about the other two computers. Please DO NOT open a service ticket for split shipments.

Continued on next page

Receipt of Equipment, *continued*

Getting Started

[Publication 4390, Important Information](#) – *Read First!* provides key information about the equipment and help available:

- List of the components included with your computer;
 - Instructions on saving the return ship label, box and packing material;
 - How to report a problem;
 - Helpful files; and
 - Helpful numbers.
-

Charge the Battery

Batteries are charged when the computer is imaged at the Depot but a number of weeks and even months may elapse before the computer is shipped. Therefore, your computer may fail due to a dead battery!

Most IRS loaned computers use two battery systems. The main battery - which is rechargeable runs the primary systems/ memory and another very small battery runs elements of the “motherboard”. It is this smaller, watch-type battery which causes the computer to fail.

The first solution to this problem is to **keep the computer plugged into a power source**. For the sites where this is not possible, **be sure to charge the battery for 24 hours before attempting to use the computer**.

Verify the Contents

IRS loans different manufacturer and model computers. The Depot is instituting improved quality checks in their processes. Please check the bag for the components. To eliminate a potential impact to your program, check the contents within 20 days of receipt. In the event something is missing or broken, this should allow sufficient time to receive a replacement before the computer is needed.

- Power cord – Some power cords may be in two pieces. Please make sure the two pieces are compatible and the cord is compatible to the computer.
- External mouse and mouse pad – Make sure the computer works with the mouse.
- Battery – This is generally in the computer. Prior to turning the computer on, please charge the battery by plugging the computer into a power outlet for 24 hours.
- Modem – All computers are equipped with internal modems.
- Network interface card, connector and network line – All machines have built in networking. Please open a Help Desk ticket in the event the internal networking is broken. If you are using networking at your site, please read the networking section later in this publication.

If any problems are identified, refer to the next section, Problem Reporting and Assistance.

Problem Reporting and Assistance

General

A number of toll-free numbers and e-mail addresses are available to get assistance and/or report problems. They are provided here with further explanation to allow you to choose the one that best fits your immediate needs.

- Computer problem – Call IRS Computer Support at 1-866-743-5748, option 2 (wait time on the phone may be lengthy at peak periods) or e-mail mits.eues.enterprise.service.desk@irs.gov.

Note: (for calls) You are able to call in your computer related problems 24 hours a day, 7 days a week; however, the Brookhaven Equipment Depot will process your request during normal working hours (6:30 a.m. until 3:30 p.m.) Requests left during non-operating hours will be processed on the next business day.

Note: (for e-mails): State in the e-mail to assign the ticket to the “NEA-VITA group”. Include in the e-mail:

- Your name, address and phone number
- Original recipient’s name. (Contact your local SPEC office if the replacement will not be sent to the original recipient of the equipment.)
- Bar code and serial number

If all of the above is not provided, it will delay the process.

- Tax law question – Call the Volunteer Assistor Hotline at 1-800-829-8482
- Tax preparation software loading or question – Call TaxSlayer Customer Support at 1-800-421-6346 or email support@vita.taxslayerpro.com.

Continued on next page

Problem Reporting and Assistance, *continued*

Computer Problems

IRS Computer Support at 1-866-743-5748, option 2 or mits.eues.enterprise.service.desk@irs.gov can provide assistance with the following issues:

- Missing or broken components (e.g., mouse, drive, power cord, etc.)
- Inventory issues (Packing List/Property Loan Agreement do not match; all computers listed not received)
- Operating system (computer will not boot; screen is blank, etc.)

Note: Always report problems with equipment to IRS. Do not obtain work from the manufacturer while on loan. Charges may be incurred that cannot be reimbursed.

Due to its limited staffing and the other processes established for certain items, IRS Computer Support CANNOT provide assistance with these issues:

- Setting up a network
- Setting up broadband
- Reporting broken printers – Report any problems with printers to your local IRS SPEC contact. DO NOT open a Help Desk ticket for a broken printer – your SPEC contact will handle all printer issues. The Depot does not service printers – only laptops.
- Passwords – (see *Passwords* section later in this document) DO NOT open a Help Desk ticket for a password. The Depot cannot provide passwords.
- Requests for more equipment (see *Allocation of Equipment* section earlier in this document)

Printer Problems

The local IRS SPEC Office provides assistance if the printer is broken. Your partner or Site Coordinator will have the contact information for the local IRS SPEC Office.

If a printer is broken, **do not throw it away**. Contact your local IRS SPEC office to arrange to return the equipment. If a printer is destroyed, such as in a fire or a storm, contact the local IRS SPEC office to make them aware of the destruction.

Continued on next page

Problem Reporting and Assistance, *continued*

Tax Law

A special hotline is available at 1-800-829-8482 for partners or volunteers with **tax law** questions. The assistors can only answer questions within the scope of the VITA and TCE programs.

Tax Preparation Software

The IRS furnishes tax preparation software for use at VITA and TCE sites. TaxSlayer, LLC provides to IRS the product TaxSlayer. Assistance is also purchased with the software. Users can call 1-800-421-6346 or email support@vita.taxslayerpro.com for assistance with:

- Installing the software or utilizing the web based product;
 - Completing the return preparation;
 - Transmitting the return;
 - Generating reports; and
 - Trouble shooting.
- If you are able to access the Internet and are having TaxSlayer issues, it is more than likely a TaxSlayer issue; the Depot does not service TaxSlayer problems.
-

Security

General

As the VITA and TCE programs continue to grow, continued vigilance is needed to ensure that all personal information provided is protected. Identity theft incidents are reported daily in the news. Help protect the programs by protecting the data you handle and store. **Security begins with you!**

Passwords

Passwords are not included in this package or with the computer shipment in the event a computer is misdirected or stolen during the shipment process. Each person scheduled to receive a computer(s) is notified of the passwords when we confirm the address information of the shipment. If the computer is redistributed to another individual, it is the responsibility of the person receiving the computer to provide the password. If they are not available, check with your sponsor's technology person or with your local IRS SPEC contact.

The Depot will not provide passwords over the phone. Do not open a Help Desk ticket for passwords!

Protection of Client's Privacy

A password is provided at the operating system level by IRS and your sponsor or partner is expected to set up a password for the tax preparation software. Although having two passwords can be cumbersome they provide additional protection for the data stored in the computer. Please assist further in protecting the privacy of those served by VITA or TCE.

- Do not share the password with anyone except those who are using the computers for VITA or TCE.
 - Do not write down the password and keep it with the computer or in the general vicinity of where the computer is stored or used. A number of computers were returned to the Depot with the password and login information taped to the machine itself. This defeats the purpose of a password.
 - Do not disable the password function.
 - Do not change the passwords provided.
 - Do not change the installed password at the operating system level.
 - Do use a unique login and passwords for the tax preparation software.
-

Continued on next page

Security, *continued*

Protection of Equipment

As part of the loan, you agree to provide protection for the equipment. This includes protection from damage and theft. Unfortunately, a few computers and printers are lost or stolen each year. The volunteers involved found the theft only took a few minutes – the volunteer ran back into the house to get something; the volunteer escorted someone to another room; the volunteer stepped away from the work area.

Stolen Equipment: If a computer or printer is stolen, notify local law enforcement immediately and file the appropriate reports. Notify your local IRS SPEC contact as soon as possible, but not more than 48 hours of the theft.

Please remember these rules to safeguard the equipment:

- Don't leave the computer or printer in an automobile where it is visible to passersby. When transporting equipment, place in the trunk or under cover in floor of vehicle.
- Don't store the computer or printer in an automobile. Use autos for transporting only.
- Don't leave the computer or printer unattended in a public location.
- Don't leave the computer or printer in a closet or cabinet that does not lock and where access is not limited.
- Don't leave the computer or printer visible through windows or doors in your home. This could encourage a theft.
- Don't expose the computer or printer to extreme weather (hot or cold).
- Keep the computer or printer away from hazards such as liquids, food, and smoke.

Damaged Equipment: Although this section focuses on theft, damaged equipment should be reported as soon as possible as well to the local IRS SPEC contact.

Alert

Thefts or losses of equipment where safeguarding rules are not followed will generally result in discontinuance of equipment loans.

Security, *continued*

Use of Wireless Technology

While the IRS **does not support** the use of wireless technology in the VITA and TCE programs, it is permitted. Partners are expected to exercise caution to ensure taxpayer return and personal information is properly safeguarded. The loss of confidentiality and integrity and the threat of denial of service attacks are risks typically associated with wireless communications.

Data Encryption

Windows 10 Professional can help protect private customer information by using its Encrypting File System (EFS). When you encrypt a file or folder, you are converting it to a format that can't be read by other people without the proper password. By selecting to encrypt certain files or folders on the computer, an additional layer of protection is added to the information. Access to the information is only available to the individual with the password, reducing the threat of unauthorized access. For more information, review the Microsoft help topic on this feature.

Even when encrypted, a file will lose its data encryption when copied to the external media drive, through a regular windows operation, except in situations where the media was formatted as New Technology File System (NTFS). NTFS supports file-level security, compression and auditing, but it has its own limitations such as it can only be read easily by the machine that formatted it. Since data must be shared between machines, it is not recommended at this time to format external media drives in this manner. However, users are cautioned to understand the risks associated with different media files and the type of backups created.

Disk Encryption

IRS added an additional security feature to the equipment it loans. The feature provides protection to any information stored on the hard disk making it virtually impossible for someone without the proper password to access the information on the computer hard drive – even if it is removed from the computer.

Security, continued

Recovery

A recovery key is not available, nor is data retrieval possible if the computer is locked due to encryption. Because of this it is extremely important to perform backup of data before shutting the computer down each day. As with all technology, system failure can occur at any time. By backing up, the chance of losing data is reduced.

Operation

Helpful Files

Two folders are located under the My Documents icon on the computer. The folders, VITA TCE Program Resources and Computer Operation Resources, contain information about the program and about the computers we loan.

Network Connection

Each computer is equipped with a network and phone connection port. This connection port enables computers to connect to a network (local or Internet). Please be careful when connecting computers and cables to eliminate damage to these ports.

Printer Cartridges

For the printers we loan, IRS will provide replacement cartridges. To determine if a replacement is available, contact your local IRS SPEC contact. We encourage recycling of the used cartridges. Most cartridges will be provided to you in a box with a shipment label, which can be used to ship the used cartridge to a recycler. We all benefit from recycling through reduced costs.

Location of Print Drivers

Print drivers for all the printers loaned by IRS and many other common printers may be found at:

- Go to “Settings/Printers and Faxes”
 - Select “Add a Printer” (on the left)
 - Select “Next”
 - Select “Next”
 - Select “Next”
 - Select “Have Disk”
 - At the “Have Disk” choice, you would browse to the location below “C:\I386\Drivers\Printers\” then Printer manufacturer.
-

Continued on next page

Operation, continued

Networking

More and more sites are finding that networking their computers together meets their needs in managing data and utilizing resources, such as printers, more efficiently. It may also add an additional security level when data is stored in a central server and not on individual computers. IRS does not discourage this (see caution in section on Use of Wireless Technology); however, we are not able to provide assistance in establishing a network.

Virus Software

IRS installs virus protection software on the loaned computers. The virus software is not pre-set to run weekly this year. Users should look at their exposure to viruses and determine the best time to run the software and/or pick up updates. Following are suggestions:

No Internet connection – Periodically run the installed virus software to ensure no viruses were introduced since last scan; scan disks before copying information to the computer.

Internet connection – Same as above but periodically download new virus definitions following the instructions provided. The frequency of which downloads should occur is dependent on the frequency of Internet activity. Instructions to Update Symantec AntiVirus:

Instructions to Update Symantec AntiVirus:

1. The computer must be connected to the internet then
Double click the “Symantec Antivirus” icon in the System Tray in the bottom right-hand corner of the desktop.
 2. The Symantec AntiVirus window opens.
 3. Click on “LiveUpdate”.
 4. On the LiveUpdate Options box, click “Next”-download will start.
 5. Click on “Finish” when it appears.
 6. Click “Exit”.
 7. A progress box will show “Updating Virus Protection....”.
 8. The progress box will close, but will not yet be finished.
 9. You will know that it is really finished when, after a while, the displayed date of the virus definitions changes to a more current date.
-

Continued on next page

Operation, *continued*

Virus Software

Virus infection is less likely for computers without access to the continued Internet; however, the computer can still be infected. Since the copy of the software is static on these computers, it will only identify viruses known at the time the software is loaded. This is still preferable to not having an anti-virus program at all.

Internet Service Provider Software

Internet Service Provider (ISP) software may be installed to program communications when accompanied by an anti-virus product. Frequent update of the anti-virus software is required and is the responsibility of the recipient. All costs associated with the use of an ISP or anti-virus product (not Provided by IRS) will be the responsibility of the recipient.

Note: Before installing new software to all computers used, please test the installation on one.

Peer-to-Peer File Sharing – Know the Risks

Peer-to-peer (P2P) file sharing is a popular way to exchange or “share” files. Any software or system allowing individual users of the Internet to connect to each other and trade files is considered P2P. This includes applications that allow users to immediately communicate with each other via instant messaging and those that allow multiple computers to pool their processing power and memory to create a super computer. Use of P2P applications introduce security risks:

- Exposes data/system to viruses/malicious code
- Places personal and/or sensitive information at risk of unauthorized access
- Imposes capacity constraints on computers and networks

Please ensure you understand the risks before installing programs on the computer.

Continued on next page

Operation, continued

Other Software

IRS does allow the recipient to load licensed software on the equipment when it is required to support volunteer electronic federal tax return preparation and filing. By loading software, the recipient confirms they have a valid license for the software and that it is used in accordance with the terms and conditions of the Software License Agreement. Copyright laws of all software and software documentation will be respected. The software must not interfere with federal electronic tax preparation.

Note: Before installing new software on all computers used, please test the installation on one.

Return of Equipment

Printers

As stated earlier, printers are governed by the local IRS SPEC Territory Office. Please contact them to determine whether the printer should be returned. If it is not returned each filing season, a [Property Loan Agreement, Form 13632](#), is required to show the continued loan of the equipment and provide IRS with the required information for inventory validation.

No printers or printer cables should be shipped to the Depot.

Laptops – Return by May 15

All laptops must be returned to be received at the Depot by May 15. Detailed information related to returning equipment after the filing season is included as part of this package in the exhibit section. Some minor modifications may be required to the “step-by-step” instructions based on changes made to the software after creation of this document.

Laptops – Data Deletion

IRS streamlined procedures for deleting data from IRS computers by pre-installing a data deletion program. The computers are pre-loaded with a data deletion program (Wipe Disk – Data and Operating System). Volunteers who use online versions of tax preparation software can return laptops to the Depot without disk wiping them because the software does not retain data on the laptop. Volunteers who use other versions of software (Desktop) and those who save taxpayer information such as lists containing PII (Personally Identifiable Information) etc. on the hard drive, are not exempt and are required to disk wipe before returning laptops to the Depot. Detailed instructions are included in the Exhibit section. **Only use this program when you are returning the equipment to the Depot.**

Laptops – Missing Boxes or Shipping Labels

To request a label and/or packaging material, send an email to: vitadepot@irs.gov. Include in the subject line: Mailing Labels. The request should include the address, telephone number and email address of the requester sender, the number of boxes needed, and number of computers in each box. One box holds up to three laptops. The Depot will generate the labels and mail them to the requester upon receipt of the email. Please also include information on packaging or boxes needed if the box used for the shipment is not re-useable and/or packing filler is needed.

Continued on next page

Return of Equipment, *continued*

Laptops – Packing for Shipment

When packing laptops for shipment, please ensure they are properly insulated with bubble wrap or other appropriate packing materials so they will not be damaged during shipment. Do not pack them using Styrofoam packing peanuts or paper. Use a strong box that has not been wet or damaged. The box should also be reinforced with strong packing tape so that the box doesn't come apart during shipment.

Laptops – One Last Check

Before returning the laptop to the Depot, please look through the bag to make sure all necessary items (power cords, mice, removable drives, etc.) are included and to remove any unneeded items. Please remove any disks, paper, and personal items before returning the laptop. Refer to Exhibit 5, *Checklist for Returning Laptops*, to verify that you have completed all the items before returning the laptops.

Laptops – Depot Address

Ship the laptops to the Depot using the shipping labels provided. The address is already included on the label but to confirm whether the correct label is used, the address for the Depot is:

**Internal Revenue Service
Attn: Brookhaven VITA Depot
1040 Waverly Avenue, MS 800
Holtsville, NY 11742**

Laptops – UPS Pickup

To schedule pickup of laptops, call UPS at 1-800-742-5877 or access their website at www.ups.com. You will not be charged for this service; all fees are charged to the IRS mail account. **Note: Record the bar code(s) and UPS tracking number(s) and provide them to your local SPEC Relationship Manager. If multiple boxes are being shipped, provide the bar codes and serial numbers for each box. The UPS tracking information and barcode/serial number for the laptops will assist with research in the event a shipment is lost.**

Exhibits

Exhibits

The following exhibits and forms are included:

Exhibit 1 – Property Loan Agreement, Form 13632

**Exhibit 2 – Procedures for Backing Up and Deleting Data
on IRS Computers**

Exhibit 3 – Packing Instructions

Exhibit 4 – Equipment Return Notice

Exhibit 5 – Checklist for Returning Laptops

Exhibit 1

Form **13632**
(July 2013)

Department of the Treasury - Internal Revenue Service

Property Loan Agreement

In support of the goals of the Internal Revenue Service (IRS) Stakeholder Partnerships, Education and Communication (SPEC) organization, the _____ piece(s) of equipment shown at the end of this agreement is loaned to

Name of recipient (*organization/individual*)

Telephone number

Street address

City

State

Zip Code

Email address

The recipient certifies that the equipment will be used for volunteer electronic tax return preparation and filing. It may also be used for related activities associated with supporting the volunteer program, such as:

- Training and educating volunteers and taxpayers about individuals' rights and responsibilities under the Internal Revenue Code;
- Reaching out to taxpayers to inform them of the services of the volunteer organization;
- Promoting activities to assist the volunteer organization in increasing its ability to deliver related tax matters or services without the direct involvement of SPEC; and
- Administering the activities of the volunteer operation as they relate to volunteer electronic tax return preparation and filing.

The equipment remains the property of the IRS. The equipment may not be used for commercial purposes. It may not be sold or otherwise disposed of. The IRS may terminate this Agreement and require the return of the equipment.

The recipient agrees to safeguard the equipment by providing appropriate physical security to prevent theft. Appropriate physical security is defined as being in the control of a volunteer at all times while in use and being in a controlled, limited access (preferably) locked location when not in use. The recipient also agrees to utilize system access security (password protection of information) while return data is present on the equipment. The recipient agrees to take reasonable care of the equipment and protect it from unnecessary abuse by themselves or others. Reasonable care includes protection of equipment from hazards such as liquids, food, smoke and unsafe handling of equipment when moving.

In addition, the recipient agrees to notify SPEC within 48 hours if the equipment is damaged, broken, lost or stolen. In the event of theft, the recipient is required to notify local law enforcement immediately and file the appropriate reports.

IRS will provide the operating system and tax preparation software along with any related support products. The recipient may load licensed software on the equipment required to support the volunteer electronic federal tax return preparation and filing program. The recipient also confirms they have a valid license for the software. Software required for operating peripheral devices like CD-ROMs, modems, and printers are acceptable and will be provided by the peripheral device owner. All software and software documentation may only be used in accordance with the terms and conditions of the Software License Agreements. Copyright laws of all software and software documentation will be respected. The related software loaded must not conflict with the primary purpose of federal electronic tax return preparation and must be removed if space limitations or operation efficiency dictate.

EXHIBIT 1

An Internet Service Provider's software may be installed on the equipment to facilitate program communications if accompanied by an anti-virus software product. Frequent update of the anti-virus software is required and is the responsibility of the recipient. All costs associated with the use of an ISP or anti-virus product will be the responsibility of the recipient. Prior to return of the equipment to IRS, the recipient will remove all non-IRS software. No additional hardware may be installed without the written consent of IRS.

Complete the Alternate Recipient Contact Information and Alternate Recipient Signature blocks if the equipment is assigned to someone other than the recipient shown above.

Barcode	Equipment Type	Serial Number	Alternate Recipient Contact Information <i>(Include Name, Address, Phone and Email)</i>	Alternate Recipient Signature	Date Returned IRS/Receiving Employee Signature

Ensure barcodes on equipment in your possession match barcodes on this Property Loan Agreement. Report discrepancies to your local SPEC Relationship Manager.

Recipient's signature _____ Date _____
 SPEC Official's signature _____ Date _____

SPEC Contact Address

Complete only those blocks that apply to your office

Name of contact		Telephone number	
Street address		City	State ZIP Code
SPEC office symbols	Mail stop	Area	Territory
			Post of Duty
			Email address

Privacy Act Notice: The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory.

Our legal right to ask for information is 5 U.S.C. 301.

We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs.

EXHIBIT 2

Procedures for Deleting Data on IRS Computers

The following steps must be taken in order to ensure the deletion of all files containing individual federal and state tax return information owned by the IRS.

The Data Deletion program should be used on IRS equipment only as the program removes all data on the computers (including the operating system). It is installed on all equipment delivered from the Depot.

VITA/TCE volunteers using online versions of tax preparation software are no longer required to follow disk-wiping procedures before returning IRS computers to the Depot. However, desktop users must continue using the disk-wiping procedures.

Deletion of Software on IRS Computers

A disk wipe utility was loaded on the computers when they were imaged. Do not use this program on non-IRS computers as it deletes all data and programs, including the operating system from the computer and writes over the drive to prevent recovery of data. The user must be signed on as the administrator.

VITA/TCE volunteers using online versions of tax preparation software are no longer required to follow disk-wiping procedures before returning IRS computers to the Depot. However, desktop users must continue using the disk-wiping procedures.

To delete data once all information has been backed up:

- Click on Start
- Select Programs
- Look for the program, "Wipe-Disk - Data and Operating System"
- Double click on the program, "Wipe-Disk - Data and Operating System". A box will appear with "Warning! All data will be wiped from disk."
- Type the following in each box to continue: "Delete My Data" (user is required to type in this statement twice to confirm this is that they want to do.)
- Type in the phrase "Delete My Data" in the two boxes only after all information has been backed up to disk or CD. Deletion may take anywhere from 15 minutes to 45 minutes per machine but does not require any additional user interaction.
- The program will start deleting the data and will show a progress bar.
- Once completed, turn the machine off.

Note: An error may be received and the screen may turn blue and say it is "dumping all memory". This is okay.

EXHIBIT 3

Packing Instructions

- 1) Ensure the box is sturdy and in good condition (no holes, tears or signs of water damage). **We request that you do not pack more than three computers in a box!**
- 2) Secure the computer in its carry bag or wrap in a plastic bag (a small trash bag works very well) if it did not come in its own computer bag. THIS IS VERY IMPORTANT as it protects the equipment from the packing material. If Styrofoam peanuts are used they can get into the computer and damage it if it is not sealed in a bag.
- 3) Ensure all components are returned with the equipment (e.g., power cord, battery, mouse, phone cord and network card/connecting cord). If a component was not provided with the computer, please document it on the packing list.
- 4) Wrap the bag with bubble wrap or place bubble wrap all around. Bubble wrap is preferred. If Styrofoam packing peanuts are used, fill the bottom of the box with 1-2 inches of foam packing peanuts. Do not use newspapers or anything that might allow the equipment to move inside the box. Paper will compact with movement during shipping and is not recommended as a filler.
- 5) Place the equipment in the box and add filler to any empty spaces. Allow for at least 2 inches of foam, packing peanuts or other materials all around (top, bottom and sides) the box. The computer bag may provide some of the packaging needed. Based on the size of the box, multiple computers may be returned in the same box. Make sure the box is packed tightly, not allowing any movement of the equipment within the box. A minimum of 2 inches of packing material (peanuts, computer bag, foam, etc.) must separate the equipment from the side of the box.
- 6) Include a sheet of paper with identifying information on where the equipment is being returned from in the event the outside label is damaged. Suggested format is shown in exhibit 4. A copy of the Property Loan Agreement or the Packing List you received with the shipment may also be included. If either of these is not used, the minimum information should be sender's name, contact information and bar codes of the equipment.
- 7) Refer to Exhibit 5, *Checklist for Returning Laptops*, to verify all actions have been taken.
- 8) Tape the box securely shut with shipping tape. Tape should be at least 2 inches wide. Do not use masking tape.
- 9) Write on the box "Fragile" and indicate the top of the box by writing "Top" with arrows on the sides to show which direction is up.
- 10) Affix the UPS mailing label with the Brookhaven Equipment Depot or local SPEC Territory address.
- 11) UPS will provide a receipt when they pick up the equipment. Keep this for your records.
- 12) Provide the UPS tracking number information to your SPEC Relationship Manager.

EXHIBIT 4

Equipment Return Notice

To: **Internal Revenue Service**
Attn: **Brookhaven Equipment Depot**
1040 Waverly Avenue, MS 800
Holtsville, NY 11742

From: **Your Name**
Address
City, State Zipcode
Phone Number
e-mail address

Description of equipment:

List the quantity and the bar codes of the equipment.

EXHIBIT 5

Checklist for Returning Laptops



Thank you for participating in the IRS loaned equipment program. Your hard work to serve American taxpayers is greatly appreciated.

Thank you for returning the loaned laptop to the IRS.

Please take a moment to verify you have:

- Disk wiped the laptop, if applicable. Refer to pages 17 and 22 of this publication for instructions.
- Removed all paperwork, removable disks, and personal items from the laptop bag.
- Packed all items that should be returned to the Depot in the laptop bag, including laptop, network cable, and external battery.
- Packed up to three (3) laptops in a sturdy box. If you do not have a sturdy box or packing material, email your request to the Depot at vitadepot@irs.gov. Please include the number of laptops being returned **(Do not pack more than three (3) laptops in a box)**.
- Recorded the bar code(s) and UPS tracking number and provided to your local SPEC relationship manager.
- Contacted UPS @ 1-800-742-5877 or www.ups.com to arrange for pickup.

www.irs.gov



Your online resource for volunteer and taxpayer assistance

The Volunteer Resource Center

(Keyword: Tax Volunteer)

- Hot topics for volunteers and partners
- Site Coordinator's Corner
- Volunteer Tax Alerts
- Volunteer Training Resources
- EITC Information for Partners
- e-file Materials and Outreach Products

Tax Information for Individuals

(Keyword: Individuals)

- 1040 Central (What's new this filing season)
- Where's My Refund
- EITC Assistant - Available in English and Spanish
- Tax Trails for answers to common tax questions
- Alternative Minimum Tax (AMT) Assistant
- Interactive Tax Assistant (ITA)

and much more!

Your direct link to tax information 24/7

www.irs.gov