

General Security Guidance (Rev. 11/18/2008)

Guidelines for setting passwords

1. Minimum length – eight for Windows, *TaxWise*TM, and *TrueCrypt*.
2. At least one upper letter and one number in the password.
3. *TaxWise 2008* requires one upper and one lower case letter plus one number or special character
4. Choose a password that is not dictionary words or names.

Password Protection:

Program computers must be protected at three levels.

- I. **Passwords at the operating system level.** To set a password, select ‘Start’, then ‘Settings’, then ‘Control Panel’, then ‘Users’.

Operating System: Log in as administrator, then go the control panel and click on ‘User Accounts.’ First of all, establish a password for the Administrator account if this has not been previously done. Make it a strong one with a mix of at least **eight** letters, numbers, and symbols. You must remember it since you cannot access Administrator functions without it. You may write it down only if you don’t keep it in the same location as the computer.

Then, either establish a new user or change the way an existing user logs on and off. Follow instructions on each screen, including naming the account, specifying the type of account, and setting a password. When finished, exit both the User Accounts and the Control Panel.

Then log off of the Administrator account and log on to the Username account to test the password, etc. Assuming all is well, you are done. Pass on this new password to the involved ERO/LC or Site Coordinator. It should not be written down at the site.

- II. **Passwords in *TaxWise*TM** **All user accounts in *TaxWise 2008* will require passwords.** Use the Admin user to assign passwords using Security Manager located in the *TaxWise*TM Utility. The first step is to establish a password for the Admin account, if not already established
 1. Log in to *TaxWise*TM as **Admin**.
 2. Open the **Tools** menu and choose **Utilities/Setup Options**.
 3. In the *TaxWise*TM **Utility** open the **Setup** menu and choose **Security Manager**.
 4. Click the **Users** tab.
 5. Select the Admin user name and click **Modify**.
 6. Enter a password in the Password box.
 7. Click **OK**.
 8. Click **OK** again on the **Security Manager** window to save your changes and close Security Manager.

9. Follow the same procedure using **Security Manager** to set passwords for other existing users.
10. **Security Manager** is also used to create New Users and a password will be required to complete the set-up process.

The next time you log in as Admin or any other user, you must use the password you assigned. For instructions to establish users please refer to IRS Publication #3189, Volunteer Administrator Guide, a copy of which is included on the *TaxWise*TM installation disk.

III. Passwords in TrueCrypt.

1. The password is setup during the initial install of TrueCrypt. (See the Encryption section of the extranet www.aarp.org/tavolunteers)

Firewalls: Computers that are connecting to the Internet must have a firewall. It is recommended that you have a firewall on your personal computer as well.

If you are running Windows XP Service Pack 2 (SP2) or XP Service Pack 3 (SP3), your firewall should be turned on automatically. You can check to make sure in the Security Center (Start, Control Panel, Security Center) (AARP Tax-Aide HP NX-6110s, 6310s and IRS Depot computers all have Windows XP Service Pack 2.)

If you are not running at least Windows XP-SP2, there are free firewalls available including Zone Alarm, which can be found at www.zonelabs.com. Grisoft AVG (see below) also has a firewall available.

Anti-Virus Software: Use the AARP Tax-Aide provided anti-virus and firewall software program to protect your computer and contents from viruses and hackers. Update this software at least weekly. AVG Internet Security Suite **v8.0** is the current version used by AARP Tax-Aide. The download link in AVG for our specific version can be found at <http://www.grisoft.com/doc/Downloads> under products. The license key can be obtained by contacting your supervisor or sending an e-mail to taxaidetech@aarp.org.

Updates to document are highlighted in yellow.