

Quality Site Requirement Alert (QSRA) - 2012-03
February 15, 2012

QSR #10 - Security, Privacy and Confidentiality: Follow all guidelines discussed in Publication 4299, *Privacy, Confidentiality, and Standards of Conduct – A Public Trust*

For the 2012 filing season, SPEC took steps to further strengthen the VITA/TCE program and mitigate risks, by

1. 'Requiring' the use of **unique** user names that are password protected, and
2. Limiting volunteer privileges to only those required to successfully perform their volunteer responsibilities in the tax preparation software.

Since making this decision, we received concerns from our VITA/TCE partners over the increase in volunteer burden to establish and manage **unique** user names for all volunteers.

Based on this, we have relaxed the policy for un-linked TaxWise desk-top users by changing “**required**” to “**strongly recommending**” for every volunteer to have unique user names.

You can make 'pen and ink' changes to the 2012 Site Coordinator's Training PowerPoint; Publication 3189, *Volunteer e-file Administrators Guide*; Publication 4299, *Privacy, Confidentiality, and Standards of Conduct – A Public Trust*; and Publication 1084, *IRS Volunteer Site Coordinator's Handbook*, to reflect this change.

After this filing season, we will work with partners and employees to develop a consistent method for identifying associated volunteers that prepared or made changes to every tax return.

For additional information, please review the QSR Guidance on [irs.gov](http://www.irs.gov/pub/irs-utl/2012_qsr_policy.pdf) under the following link: http://www.irs.gov/pub/irs-utl/2012_qsr_policy.pdf.

If you have any questions, please discuss them with your site coordinator, contact your local IRS SPEC relationship manager, or e-mail us at partner@irs.gov.

Thank you for volunteering to serve your community and for your dedication to providing top QUALITY service!