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Oct. 14, 2019

Form W-12 (Rev. October 2019) Department of the Treasury Internal Revenue Service	IRS Paid Preparer Tax Identification Number (PTIN) Application and Renewal			OMB No. 1545-2190
	▶ Go to www.irs.gov/FormW12 for instructions and the latest information.			
1 Name and PTIN (Print in ink or Type)	First name	Middle name	Last name	
	<input type="checkbox"/> Initial application			
	<input type="checkbox"/> Renewal application		(Enter PTIN: P <input type="text"/>)	
11 Data Security Responsibilities	As a paid tax return preparer, I am aware of my legal obligation to have a data security plan and to provide data and system security protections for all taxpayer information. Check the box to confirm you are aware of this responsibility. <input type="checkbox"/>			
Form W-12 (Rev. 10-2019)				

The IRS recently released the updated W-12 (PTIN Application Renewal) form and one of the questions that preparers will need to take note of is #11-Data Security Responsibilities which states: *“As a paid tax return preparer, I am aware of my legal obligation to have a data security plan and to provide data and system security protections for all taxpayer information. Check the box to confirm you are aware of this responsibility.”* Security responsibility and resources are outlined in IRS Publication 4557-Safeguarding Taxpayer Data and IRS Publication 5293-Data Security Resource Guide for Tax Professionals.

“Protecting taxpayer data is the law” according to IRS Publication 4557 which states that tax preparers must create and enact security plans to protect client data and online filers must comply with the “Security Six” and privacy standards set in IRS Publication 1345-Handbook for Authorized IRS e-File Providers of Individual Income Tax Returns. The Security Six refers to the use of anti-virus software, firewalls, multi-

factor authentication, backup software/services, drive encryption and virtual private

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with the FTC Safeguards Rule. Tax preparers must also learn to recognize phishing emails, utilize security software, and generally be able to work safely on the Internet as outlined in the guide. It is recommended that all firms assign a tax person to work with the firm's internal information technology personnel and an outsourced information security provider to get the firm in compliance with these IRS regulations.

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Technology

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