TaxSpeaker®
Excellence In Education

TaxSpeaker 2016 OFFICE SYSTEM SECURITY CHECKLIST	Complete ✓
1. Encrypt all hard drives on all machines with confidential data	
2. Turn off systems at night, weekends and vacation (n/a-servers)	
3. Reboot computers as you leave for appointments & lunch, logging back in when you return	
4. Require passwords to access the start screen on all smart phones, tablets and laptops	
5. Establish a password with 8 characters of letters, numbers and wildcard character, memorize it and do not share it; and utilize DashLane password software	
6. Install and update an antivirus/anti-phishing and firewall security suite program ***on all systems*** (We use & recommend BitDefender)	
7. Implement physical security standards: power down systems when leaving, locking up portable devices, securing server rooms	
8. Implement a “no-click” policy on email links	
9. Restrict remote access to data by all owners and employees, implementing a written office-wide policy and VPNs rather than remote log-in software	
10. Change default passwords and addresses on all devices including routers, computers, tablets, smart phones and software	
11. Practice invisible client interviews: clean desks, files locked away, and computers turned off; or perform all interviews in conference rooms without computer system access. Never allow a client unaccompanied in any room with a computer or file	
12. Establish written standards for work-at-home situations requiring secure rooms, no-access to computer policy except by staff, system shut down at all times when absent. See TaxSpeaker® Telecommuting policy	
13. Perform employee background checks similar to banking institutions	
14. Redact all client SSN’s, firm EFIN & personal PTIN on all documents	
15. Never provide a client or outsider with Wi-Fi access in your office	
16. Never, ever use public Wi-Fi including planes, airports, restaurants unless through a secure VPN or using encrypted email	
17. Accept client data only by portal upload, physical visit or surface delivery	
18. External mail boxes and drop off areas must be locked and secure	
19. Change Wi-Fi and all logins upon dismissal, retirement or job change of an employee	
20. Implement, educate and enforce a company-wide computer/internet use policy. See TaxSpeaker® Computer/Internet Use policy	