

Journey House Center for Family Learning and Youth Athletics Volunteer Income Tax Assistance (VITA Program)

CLIENT CONFIDENTIALITY AND COMPUTER ACCESS AGREEMENT

Confidential Information means any information that identified as personal, sensitive, or confidential such as personally-identifiable information, individually-identifiable health information, education records, and non-public information. Confidential information includes, but is not limited to, the following examples:

As a VITA volunteer, I agree to follow the policies, procedures and rules of conduct explained below.

- Social Security number
- Physical description
- Home address
- Home telephone number
- Ethnicity
- Gender
- Financial matters (ex. W2's, income verification, bank information)
- Medical and employment history
- Education information
- Driver's license number or Identification Card number

As a participant in the VITA Program, I agree to protect confidential information against unauthorized access, unauthorized use, loss, or damage. VITA Participants must adhere to the following:

- Treat all tax payers professionally, with courtesy and respect.
- Do not disclose, release, transfer, disseminate, or otherwise communicate all or any part of any record orally, in writing, electronically or any other means to any person or entity without consent of the taxpayer.
- Do not share or disclose personal authentication credentials, such as user-IDs and passwords or other forms of electronic authentication with other individuals with access to any information systems containing confidential information.
- Do not leave computer equipment portable storage devices unattended.
- Enable screen savers with authentication (Locking passwords) for all computer systems provided by Journey House.
- Use caution when accessing TaxSlayer, IRS website, WDOR website, email, and do not trust any unexpected emails. Never open an attachment without first verifying its type and sender. If in doubt, notify the immediate Site Coordinator, delete it, and/or contact the sender first.
- Position monitors and printers so that others cannot see or obtain confidential or sensitive data.
- Log Out, shut down, or lock the system when leaving your computer unattended at any time.
- Physical safeguard (keys, passwords, etc.) which are used to secure confidential information and should be changed occasionally.
- Take particular care at home to keep TaxSlayer system and sensitive data secure from unauthorized access.
- Do not sign in to any online systems after regular business hours or from any other place other than Journey House.
- Always verify the identity matches the paperwork before presenting the file to taxpayer.

- Maintain confidentiality, integrity, and securely dispose of unnecessary confidential information in an approved manner. Per the IRS, all documents must be shredded or burned. Journey House VITA Program chooses to utilize the shredding method to destroy documents.
- Protect confidentiality and security of electronic and printed information (paper) maintained in work areas.
- All confidential and private information that is no longer needed will be returned to the client or destroyed.
- Will either use a shredder to destroy confidential information or will place these materials into a locked container which is intended for destruction of confidential information.
- Promptly report any possible unauthorized access, use or loss of information or an information system to immediate site coordinator.
- Never send confidential information using non-secure applications such as IM, Chat programs, social media or regular email. Do not send sensitive information to email accounts other than Journey House or IRS accounts.

At any time that the above terms are not adhered to, you are subject to disciplinary action up to and including termination or removal from the program.

I understand that I must agree to all the terms listed above each year that I am employed/Volunteer with Journey House's VITA Program.

Signature	Date
Print Name	
Address	
Telephone	Email Address