AARP Tax-Aide
Vermont Technology
October 2017

Vermont Technology

- Windows Updates
- Windows 10
- On Line Inventory System
- Hot Spots
- Tax Slayer Order
- Equipment Repair/Replace
- Out Dated Hardware Replacement
- Districts
- Consumables
- IRS Printers

Vermont Technology

- Windows Updates
  - Antivirus is
    - Win 7 Microsoft Security Essentials
    - Win 10 Windows Defender
  - All Tax Aide Laptops are to have the latest Windows updates applied before the start of the tax season
    - Win 10 auto updates
    - Win 7 councilor initiated
    - You need broadband access to perform these updates
    - If you are not sure how to do this call me
    - This includes any "spare" machines you may have

Vermont Technology

- Windows 10
  - National has now putting in place a process to reimage or replace all Windows 7 machines well before the 2020 Win 7 support date
  - At the end of of the season I will start collecting machines to transition to Windows 10
    - Art Kaiser has agreed to collect Windows 7 machines down south and upgrade them to Win 10
    - Win 10 is to be the Tax Aide machine

On Line Inventory System (OIS)

- OIS is used to track Tax Aide equipment hardware
  - Data base is accessible from the portal
  - Stores information about the equipment
    - Tag number, serial numbers and other information about the hardware
    - Keeps track who is the custodian of the equipment
    - The Tax Aide Inventory Assistant (TIA) feeds data to the OIS
      - Each time the computer is booted the TIA contacts the OIS with updated location information
  - System is set up so District Coordinator can access the data base and update with custodian information as needed

Hot Spots

- Hot Spots
  - Tax Aide national provided broadband hot spot hardware
    - Use is predicated on cell tower coverage
    - Only uses the data portion of cell connectivity
  - Currently We have 15 hot spot devices
    - I have asked for another 13 units but not sure if or when will get them
    - National is having second thoughts about the purchase hot spots
    - Getting very expensive
    - But is the most secure way to get on the internet
  - Reminder
    - Tax Aide National does monitor the usage of these hot spots
    - They get regular data used (not content) reports from Verizon
    - If a hot spot is not used during the season National will want the device returned

TaxSlayer Orders

- I sent out spread sheet to DC's in late September requesting updates to the order
  - Received responses from all districts
  - The order will be submitted to Grant on (Nov 1) TBD
  - This distribution has no software associated with it so it is just the license information to use the TaxSlayer software
  - A few months ago I tried to access e-service and could not because the site was down for maintenance but actually down for changes
  - IRS e-services is changing to use MFA for login to e-services
    - This change will be rolled out in late October
    - At this time I can't access e-services to make any changes to the EFIN related information
  - Once this change is completed I will again be able to update EFIN information
    - I don't expect this change will impact the coming season

Equipment Repair/Replacement

- National has a procedure for replacing defective computers and printers
  - If you have an anomaly with your equipment
    - Call me first and then and together we will determine what the failure is
  - Printer replacement
    - If there is a printer failure Graceworkz must be called (by the custodian) and the failure reported to them
    - The tag number and serial is needed and provided to the service center
    - The service center will work with the user to determine if the problem is just the set up of the printer or other fault
    - If a replacement is warranted the replacement will be sent directly to the councilor via Fedex
  - Upon receipt of the replacement printer call me with the priner model, tag and serial numbers
  - The councilor must return the defective printer
  - A prepaid return label is provided with the new printer for the return of the failed unit
- If the failure is a computer, I will contact Graceworks and ask for a replacement machine
  - The replacement will be sent to me, I will configure it and then send it on to the councilor who will send to failed computer to me

Equipment Replacement Status

- **Out dated computer hardware replacement**
  - National is in the process of identifying under performing computers and replacing them
    - I have received the information about the replacements
  - We will be getting 13 additional computers to replace those machine whose performance is boarder line
  - I will be contacting the councilors who have these computers
  - Today I don't have any information as to exactly when this replacement process will begin

Districts

- Vermont Tax Aide Districts

	Row Labels	No of Sites	VMIS District ID	New District ID	VT Counties
VT1	VT1 JOHN GLASSERMAN	32		01	Chittenden/Grand Isle
VT1	VT1 TED SMITH	2		02	Franklin
VT1	VT1 ARMAND LEMIEUX	2		03	Orleans
VT1	VT1 KENNETH JOHNSTON	1		04	Essex
VT1	VT1 GEORGIA VALENTINE	7		05	Washington
VT1	VT1 KATHLEEN DUCLOS	2		06	Addison
VT1	VT1 CONNIE PHILLEO	2		07	Orange
VT1	VT1 PHIL STEPHAN	2		08	Rutland
VT1	VT1 CHERYL HEATER	2		09	Upper Windsor
VT1	VT1 VICKIE LUCIUS	6		10	Lower Windsor
VT1	VT1 BARTH VANDER ELS	3		11	Bennington
VT1	VT1 BOB BASHFORD	3		12	Windham

Security

Multi-Factor Authentication (MFA) Overview:

- **Taken from the TSO fact sheet**
- "As part of the IRS Commissioner's Security Summit effort, the IRS, state tax agencies and the tax industry have joined to combat identity theft to protect taxpayer data. It's critical that tax professionals remember they not only have an obligation but are legally required under federal law to protect taxpayer information. MFA is a requirement for ALL professional web-based software providers."
- MFA is a security system requiring users, such as volunteers, to confirm who they are through an authentication process, with information unknown by the user, prior to TaxSlayer allowing access to the Pro Online software.
- **New Subject – Wireless Technology**
  - At the end of the TSO fact sheet there is a discussion about wireless technology and what should be done if you experiences slow internet speeds
  - Call me first, I ask you to just run speedtest.net in your favorite browser
    - We need to be sure the slowness is to our connection to the Internet NOT to the TSO servers

Consumables

- Marty Kovacs to Order consumables
  - Art Kaiser will be the alternate contact for ordering consumables
  - Consumables is toner for the laser printers and projector bulbs
    - No inkjet printers are supported by AARP
  - Send me an email and specify the following information:
    - Printer make and model (not the toner part number)
    - Shipping address:
      - Name, address and phone number
    - Because toner is shipped via Fedex the address needs to be a street address with phone number
  - Toner usually ships the next business day and will arrive in 1 - 2 days

IRS Printers

Barcode	Name	Cert		SerialNumber	ModelName	Manufacturer
A002225631	**Connie Philleo**	13-Sep-13	In Use	1040130	OPTRA E312	Lexmark
A002583657	**Phil Stephen**	29-Mar-11	in Use	ABV4Y07767	MITA LASER	Kyocera Mita

Final Thoughts

- Questions?