



Wolters Kluwer

Cybersecurity for Tax Professionals

Course Instructions

Author: Robert Minniti

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Instructions to Participants

To assist the participant with navigating the learning process through to successful completion, this course has been produced with the following elements:

Overview of Topics / Table of Contents: In this electronic format you'll find a slide menu on the left side of the screen. This serves as your overview of topics for the program. You may navigate to any topic by clicking on the slide name.

Definition of Key Terms / Glossary: You'll find key terms defined for this program in the course information on the following page(s).

Index / Key Word Search: You can find information quickly in the PDF materials (slide handout plus any additional handouts) by using the search function built into your Adobe Reader.

Review Questions: Questions that test your understanding of the material are placed throughout the course. You'll see explanatory feedback pop up for each incorrect answer, and reinforcement feedback for the correct answer for every review question.

Final Exam: The final exam measures if you have gained the knowledge, skills, or abilities outlined in the learning objectives. You may submit your final exam at the end of the course. Exams are graded instantly. A minimum score of 70% is required to receive the certificate of completion. **You have one year from date of purchase to complete the course.**

Course Evaluation: Once you have successfully passed your online exam, please complete our online course evaluation. Your feedback helps Wolters Kluwer maintain its high quality standards!

About This Course

This section provides information that is important for understanding the course, such as course level and prerequisites. Please consider this information when filling out your evaluation after completing the course.

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Course Description

The IRS has recently updated its guidelines for data and cyber security placing new responsibility for the security of taxpayer's personal information on tax preparers. This course is designed for tax professionals who collect and store client's personal information, who would like to obtain an understanding of data and cybersecurity. You have probably heard of some of the more common types of cyber crimes such as ransomware, spyware, computer viruses, phishing, vishing, spoofing, data breaches, denial of service attacks, hacking, etc. This course is designed to familiarize tax professionals who are not information technology (IT) experts on data breach and cybersecurity risks and internal controls. We will review the IRS recommendations for securing taxpayer information. We will cover the material in a plain language, nontechnical manner. We will cover what you need to know, but not how to write the computer programs or code.

Learning Objectives

Upon successful completion of this course, participants should be able to:

- Identify cybersecurity risks
- Identify internal controls for cybersecurity
- Identify the IRS cybersecurity recommendations for tax professionals
- Recognize types of cyber frauds
- Identify how to prevent or detect cyber frauds

NASBA Field of Study

Taxes. Some state boards may count credits under different categories—check with your state board for more information.

Course Level

Basic. Program knowledge level most beneficial to CPAs new to a skill or an attribute. These individuals are often at the staff or entry level in organizations, although such programs may also benefit a seasoned professional with limited exposure to the area.

Prerequisites

None.

Advance Preparation

None.

Course Expiration

AICPA and NASBA Standards require all Self-Study courses to be completed and the final exam submitted within 1 year from the date of purchase as shown on your invoice. No

extensions are allowed under AICPA/NASBA rules.