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Experts explain IRS's data security plan template, how preparers should use it in preparation for 2023 tax season

Panelists discuss latest news in virtual roundtable

APPLETON, Wis. (Oct. 3, 2022) – Anyone renewing their preparer tax identification number (PTIN) for 2023 will be asked to attest to their data security responsibility and whether they are aware of their obligation to have a data security plan in place to provide protections for all taxpayer information.

Last month, the IRS released a template for tax preparers to use after many requests for more information following the announcement of the data security plan requirement in 2020.

Experts at the National Association of Tax Professionals and Drake Software, who both have served on the IRS Electronic Tax Administration Advisory Committee (ETAAC), convened last month to discuss the long-awaited IRS guidance, the pros and cons of the IRS's template and the risks of not having a data security plan.

“Being able to share my experience from serving on ETAAC to help tax preparers in advance of the coming season was rewarding, but I also believe it is crucial for preparers to understand the seriousness of this topic and how detrimental it could be to their firm and their clients if they don't have a data security plan in place,” Larry Gray, NATP's government liaison, said. Gray served on ETAAC, IRPAC, IRSAC and the IRS's Commissioner's Advisory Group working to amplify the importance of data security.

The group also discussed in the virtual roundtable the background of the IRS Security Summit and how the IRS came to release a sample written information security plan (WISP).

“This is such an important topic, and one that preparers will have to grapple with in the coming years, if they haven't already,” said Jared Ballew, director of government relations for Drake Software. “Data is now a currency and having a plan in place to protect their clients is critical for tax preparers as we prepare for the 2023 tax season.”

This discussion is [available now for tax preparers to watch](#) for free in preparation of the 2023 tax season. Tax preparers must renew their PTIN by Dec. 31 each year.

For more information or to speak with an expert on this topic, contact [Nancy Kasten](#) or [Samantha Strong](#).

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About NATP: The National Association of Tax Professionals (NATP) is the largest association dedicated to equipping tax professionals with the resources, connections and education they need to provide the highest level of service to their clients. 23,000 members rely on NATP to deliver professional connections, content expertise and advocacy that provides them with the support they need to best serve their clients. The NATP headquarters is located in Appleton, WI. To learn more, visit www.natptax.com.

About Drake Software: Drake Software, a private company founded in 1977, provides software solutions to over 70,000 tax and accounting firms that file more than 36 million tax returns every year. Known for its award-winning customer service team, Drake is also consistently recognized for excellence in quality, value, and reliability. As part of its commitment to innovation and customer success, the company has continued to expand product offerings, integrations, and customer-service efforts — more than doubling its customers over the past decade.

Looking for a tax expert? Tom O'Saben, EA, is the director of tax content and government relations at the National Association of Tax Professionals (NATP). Tom is available for phone or video interviews to discuss federal tax topics including tax law change and its implications, taxpayer issues, tax preparer regulation and more. To schedule an interview with O'Saben, contact nkasten@natptax.com.