

Tax Season Cybersecurity Checklist

Secure Accounts & Access

- ☐ Enable multi-factor authentication (MFA) on tax software, email, banking, payroll and investment accounts
- ☐ Use strong, unique passwords for every account
- ☐ Review and remove unused or inactive user accounts

Protect Devices & Networks

- ☐ Install all operating system, browser, and application updates
- ☐ Ensure antivirus and endpoint protection are active and up to date
- ☐ Avoid using public Wi-Fi for tax-related activity
- ☐ Use a secure, reliable internet connection when accessing financial or tax information

Handle Email, Links & Attachments Safely

- ☐ Be cautious with links in emails, even from legitimate senders
- ☐ When possible, navigate directly to financial or tax websites instead of clicking email links
- ☐ Avoid opening unexpected attachments containing sensitive information
- ☐ Watch for urgency, threats, or unusual requests for personal data

Secure Physical Mail & Paper Documents

- ☐ Retrieve tax-related mail promptly
- ☐ Store financial and tax documents in a secure location
- ☐ Avoid leaving sensitive paperwork unattended on desks, printers, or shared spaces
- ☐ Shred documents containing personal or financial information before disposal

Safeguard & Back Up Sensitive Data

- ☐ Use secure online portals or paperless delivery options when available
- ☐ Limit how long sensitive files are stored on devices or in email inboxes
- ☐ Back up tax documents and financial records regularly
- ☐ Ensure backups are protected from ransomware and unauthorized access

Reduce Risk Through Timing & Awareness

- ☐ Consider filing taxes early to reduce the risk of fraudulent filings
- ☐ Allow extra time to review communications carefully and avoid rushed decisions
- ☐ Monitor accounts for unusual or suspicious activity throughout tax season

Additional Steps for Businesses

- ☐ Remind employees to stay alert for tax-related phishing attempts
- ☐ Secure payroll, accounting, and HR systems
- ☐ Monitor systems for unusual logins or file access
- ☐ Review cybersecurity policies before peak tax activity



100 Citynet Drive, Bridgeport, WV 26330
Phone: 1.844.CITYNET / 304.848.5400
Website: www.citynet.net