

## IRS Loaned Equipment for VITA/TCE Partners

### Background

This Fact Sheet provides information to partners and volunteers to prevent loss or theft of partner and/or IRS owned equipment.

### VITA/TCE Partner Responsibilities

- Complete **Form 15272, VITA/ TCE Security Plan**.
- Safeguard **all** equipment. The security requirement for partner owned equipment is the same as IRS loaned equipment.
- Return any unused or broken IRS loaned equipment to the IRS
  - Laptops to the VITA Depot.
  - Printers to the local IRS SPEC office.
- Inform your local IRS SPEC office of any changes in responsible parties of IRS loaned equipment.
- Provide a plan to become self-sufficient and non-reliant on current IRS loaned equipment.

### Form 15272, VITA/TCE Security Plan

A security plan should be completed for each site. The plan should account for all equipment used at the site.

- IRS loaned equipment is covered under question 4 and 7 of this form.
- All equipment used at the site (IRS loaned, partner, site, and individually owned) needs to be accounted for in the security plan. A separate document listing the equipment can be attached to the security plan, such as:
  - A list of partner, site or individually owned equipment that may be used for insurance purposes.
  - Signed copy of Form 13632, Property Loan Agreement, that lists all assigned IRS loan equipment.

### Safeguarding Equipment

Theft or loss of IRS loaned equipment where safeguarding rules are not followed could result in discontinuance of loaned equipment.

- Ensure all computers or printers in an automobile are not visible to passersby. When transporting equipment, place in the trunk or under cover in the floor of the vehicle.
- Ensure computers or printers are not stored in an automobile. Use automobiles for transporting only.
- Ensure computers or printers are not left unattended in a public location.
- Ensure computers or printers are stored in a locked closet or cabinet where access is limited.

- Ensure computers or printers are not visible through windows or doors. This could encourage theft.
- Ensure computers or printers are not exposed to extreme weather (hot or cold) or hazardous environments.
- Ensure computers or printers are kept away from liquids, food, and smoke.
- Damaged Equipment: Although this section focuses on theft, damaged equipment should be reported as soon as possible as well to your local IRS SPEC relationship manager.
- Lost or stolen equipment needs to be reported immediately, but not later than the next business day after confirmation of the incident. Local law enforcement must be notified immediately, and a police report filed and sent to your local IRS SPEC relationship manager. Every effort should be made to avoid equipment being lost or stolen.

## Unused Equipment

- All unused or broken IRS loaned equipment will be returned to its appropriate location. Do not dispose or excess any broken or malfunctioning IRS loan asset yourself. Ensure that they are properly returned to the following locations:
  - Laptops to the VITA Depot
  - Printers to your local IRS SPEC office
- Your local IRS SPEC relationship manager and/or equipment point of contact needs to be notified in writing of any equipment being returned.
- Tracking numbers need to be provided to your local SPEC relationship manager or equipment point of contact for all IRS loaned equipment sent to the VITA Depot.
- Secure shipping boxes and return labels for all IRS provided laptops and printers to avoid any delays in returning equipment.
- Provide written notification to your local SPEC relationship manager or equipment point of contact when shipping equipment to the territory office.

## Property Loan Agreement (PLA) – Form 13632

- Your local SPEC relationship manager or equipment point of contact should send you a PLA within 2 weeks of receipt of loaned IRS equipment.
- The PLA documents the loan of equipment and communicates the conditions of the loan.
- Compare and verify the IRS loan equipment barcodes and serial numbers for each asset received against the provided PLA.
- All PLAs are to be sign and submitted to your local SPEC office within 20 days of receipt.
- Make any needed changes to the PLA, sign and return to your local SPEC office.

## IRS Laptop Problems

If an IRS loaned laptop has problems or issues, call IRS Computer Support at 1-866-743-5748, option 2.

Some examples include:

- Missing or broken components (e.g. mouse, drive, power cord, etc.)
- Inventory issues (Packing List/Property Loan Agreement do not match all computers listed or not received)
- Operating system (computer will not boot, screen is blank, etc.)
- Please contact your local SPEC relationship manager or equipment point of contact if there are any discrepancies.