



**2016 TOOLBOX CS, v.2016.1.1**  
**User Bulletin 8434: Security Enhancements**

**December 15, 2016**

---

This user bulletin applies to all ToolBox CS<sup>®</sup> users, and describes changes made to this release of ToolBox CS.

## **ENHANCEMENTS**

### **ToolBox CS login security**

At Thomson Reuters, the security of your data is a top priority—and we're taking steps to strengthen data security, protect your business, and comply with recent IRS security requirements.

As data security risks continue to grow for the tax and accounting profession and cybercriminals become more advanced in their methods, we will continue to communicate important information you need to keep your firm and clients safe. Below, we lay out the new IRS requirements that are applicable to tax software providers and professionals who use the software.

### **New IRS requirements**

For Tax Year 2016, the IRS—working in partnership with vendors and practitioners in the profession—is now requiring that all tax-related software for professionals be protected by a login and password.

- 1. Login requirements for tax-related professional software:** The IRS requires that any tax-related software for professionals needs to have a login with certain password requirements (regardless of whether the software is accessed via desktop or the cloud).
- 2. Password strength:** As defined by the IRS, a strong password will now contain a minimum of eight characters with at least one uppercase letter, lowercase letter, number, and special character.
- 3. Timeout period:** After 30 minutes of inactivity on the workstation, applications will time out and users will be required to re-authenticate using their credentials. You can then resume work on the pre-timeout screen. Any activity on that computer (in email, your browser, or other software such as Microsoft Excel<sup>®</sup>) will prevent your CS Professional Suite software from timing out. Operations within the software (such as long print jobs) will continue during the timeout period.
- 4. Multi-factor authentication:** It is strongly advised that you employ multi-factor authentication for additional security. Later this year, we will introduce Thomson Reuters Authenticator, our new multi-factor mobile app, which can help firms meet industry standard factors of authentication.

### **Multi-Factor Authentication**

In addition to the application login requirements, the IRS also recommends that vendors offer multi-factor authentication for their tax-related software. As a leader in data security, Thomson Reuters can offer even more advanced security options for firms that want to take advantage of this extra layer of security.

Later this year, we will introduce **Thomson Reuters Authenticator**, our new multi-factor mobile app, which can help firms meet all three industry standard factors of authentication:

1. Something you know—You **know** your login and password
2. Something you have—You **have** your smartphone, tablet, Apple® watch, or other device
3. Something you are—If you have Touch ID, you **are** your fingerprint

You've probably used multi-factor authentication in some form already, such as when you use your debit card or withdraw cash from an ATM. You **know** your PIN number, and you **have** your debit card. Used together, they protect your account and offer much stronger security than one factor alone. We strongly advise that you take these steps to strengthen the security of both your firm and your clients' data.

### **Creating login credentials for your CS Professional Suite applications**

The login credentials that your staff will use to sign in to your CS Professional Suite software are created and managed via the [My Accounts page on our website](#). In conjunction with this release, your firm administrator will receive an email with a link to upgrade your firm's existing CS Web accounts, which will enable your staff to sign in to your CS Professional Suite desktop software using their CS Web usernames and passwords.

These credentials enable your staff to sign in to 2016 UltraTax CS, Fixed Assets CS, Planner CS, and ToolBox CS. The following applications will include this sign-in feature with their December 2016 releases: Accounting CS, FileCabinet CS, Practice CS, and Workpapers CS.

For more information, see the [CS Professional Suite application security overview](#) in our Help & How-To Center.