

Request for Records Disposition Authority

Records Schedule Number **DAA-0058-2012-0006**
 Schedule Status **Approved**

Agency or Establishment **Internal Revenue Service**
 Record Group / Scheduling Group **Records of the Internal Revenue Service**
 Records Schedule applies to **Major Subdivision**
 Major Subdivision **Small Business/Self Employed**
 Minor Subdivision **Collection Policy, Campus Operations**
 Schedule Subject **Updates to Records Control Schedule 29, Item 69(5) Direct Debit
 Installment Agreements**

Internal agency concurrences will be provided **No**

Background Information **These records were previously approved under NARA job number NC1-58-85-10, Item 69(5) However, it has come to the attention of the Business Unit from General Counsel that these records should be maintained for 2 years following the final debit to the account in instances where recurring debits to a consumer's account are authorized These accounts could be opened for as long as 10 years, therefore, the business unit would like to increase the retention period to 12 years This schedule is intended to change the language to meet these retention requirements**

Item Count

Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items
1	0	1	0

GAO Approval

Outline of Records Schedule Items for DAA-0058-2012-0006

Sequence Number	
1	Direct Debit Installment Agreements (Form 433-D) and related documents Disposition Authority Number DAA-0058-2012-0006-0001

Records Schedule Items

Sequence Number					
1	<p>Direct Debit Installment Agreements (Form 433-D) and related documents</p> <p>Disposition Authority Number DAA-0058-2012-0006-0001</p> <p>Direct Debit Installment Agreements (Form 433-D) and related documents These records are used by Compliance function taxpayer contact personnel to set up an agreement between the IRS and the taxpayer. The completed form permits the taxpayer to pay delinquent taxes through installment payments.</p> <p>Final Disposition Temporary</p> <p>Item Status Active</p> <p>Is this item media neutral? Yes</p> <p>Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Manual Citation</th> <th style="width: 50%;">Manual Title</th> </tr> </thead> <tbody> <tr> <td>Records Control Schedule 29, Item 69(5)</td> <td>Records Control Schedule for Submissions Processing Campus Records</td> </tr> </tbody> </table> <p>GRS or Superseded Authority Citation NC1-58-85-10 Item 69(5)</p> <p>Disposition Instruction</p> <p>Transfer to Inactive Storage Retire every 60 days or when no longer needed, whichever is earlier</p> <p>Retention Period Destroy immediately after 12 years</p> <p>Additional Information</p> <p>GAO Approval Not Required</p>	Manual Citation	Manual Title	Records Control Schedule 29, Item 69(5)	Records Control Schedule for Submissions Processing Campus Records
Manual Citation	Manual Title				
Records Control Schedule 29, Item 69(5)	Records Control Schedule for Submissions Processing Campus Records				

Agency Certification

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed for disposal in this schedule are not now needed for the business of the agency or will not be needed after the retention periods specified

Signatory Information

Date	Action	By	Title	Organization
07/02/2012	Certify	Tracee Taylor	Senior Records Analyst	Real Estate and Facilities Management - Records and Information Management Program
12/14/2012	Submit for Concurrence	Jametta Davis	Appraiser	National Archives and Records Administration - Records Management Services
12/17/2012	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - Records Management Services
12/17/2012	Concur	Laurence Brewer	Director, National Records Management Program	National Archives and Records Administration - National Records Management Program
12/18/2012	Approve	Paul Wester	Chief Records Officer for the U S Government	National Archives and Records Administration - Office of the Chief Records Officer