

## Request for Records Disposition Authority

Records Schedule Number **DAA-0058-2013-0012**  
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 **Internal Revenue Service**  
Minor Subdivision **Appeals**  
Schedule Subject **Update to Appeals Customer Service (ACuServ) System**  
Internal agency concurrences will be provided **No**

### Background Information

### Item Count

Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items
<b>2</b>	<b>0</b>	<b>2</b>	<b>0</b>

### GAO Approval

## Outline of Records Schedule Items for DAA-0058-2013-0012

Sequence Number	
1	Appeals Customer Service (ACuServ) System
1 1	35a Inputs Disposition Authority Number DAA-0058-2013-0012-0001
1 2	35c Outputs Disposition Authority Number DAA-0058-2013-0012-0002

Records Schedule Items

Sequence Number					
1	<p><b>Appeals Customer Service (ACuServ) System</b> This Schedule seeks to update the disposition instructions for ACuServe Input and Output records, not adequately covered under GRS 20</p>				
1 1	<p><b>35a Inputs</b> Disposition Authority Number      <b>DAA-0058-2013-0012-0001</b></p> <p>Referrals originate from the Taxpayer Advocates Office, taxpayer, taxpayer's representative, Appeals Officer, District Counsel attorney, or potentially anybody who had been previously involved in the actual Appeals case that has closed, and who recognizes there is an account issue that requires resolution. Referrals can take the form of email, regular mail, fax, or telephone. Inputs include manually entered information about the taxpayer and his/her case, the IRS employee working the case, and some system-generated auditable information such as the login and logoff of users. All taxpayer data is obtained through contact with the taxpayer or from his/her representative. Once that information is received, the CSR or AARS can research other IRS systems to resolve the account issues.</p> <p>Final Disposition                      <b>Temporary</b></p> <p>Item Status                              <b>Active</b></p> <p>Is this item media neutral?        <b>Yes</b></p> <p>Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?      <b>No</b></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><b>RCS 10, item 35a</b></td> <td><b>Records Control Schedule 10 for Appeals</b></td> </tr> </tbody> </table> <p>GRS or Superseded Authority Citation      <b>Job No N1-058-07-8, item 35a</b></p> <p>Disposition Instruction</p> <p>Cutoff Instruction                      <b>Cut off at the end of the quarter in which the case/referral is closed</b></p> <p>Retention Period                      <b>Destroy no less than 1 year after cutoff, but not later than 2 years after cutoff</b></p> <p>Additional Information</p>	Manual Citation	Manual Title	<b>RCS 10, item 35a</b>	<b>Records Control Schedule 10 for Appeals</b>
Manual Citation	Manual Title				
<b>RCS 10, item 35a</b>	<b>Records Control Schedule 10 for Appeals</b>				

1 2

GAO Approval **Not Required**

**35c Outputs**

Disposition Authority Number **DAA-0058-2013-0012-0002**

**Electronic and paper outputs including follow-up reports, closure reports, action date reports, and reports to track trends in the sources of inquiries received**

Final Disposition **Temporary**

Item Status **Active**

Is this item media neutral? **Yes**

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? **No**

Manual Citation	Manual Title
<b>RCS 10, item 35c</b>	<b>Records Control Schedule 10 for Appeals</b>

GRS or Superseded Authority Citation **Job No N1-058-07-8, item 35c**

**Disposition Instruction**

Cutoff Instruction **Cut off at the end of the quarter in which the case/referral is closed**

Retention Period **Delete/Destroy no less than 1 year after cutoff, but not later than 2 years after cutoff**

**Additional Information**

GAO Approval **Not Required**

## 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
03/19/2013	Certify	Tracee Taylor	Senior Records Analyst	Real Estate and Facilities Management - Records and Information Management Program
07/16/2013	Submit for Concurrence	Jametta Davis	Appraiser	National Archives and Records Administration - Records Management Services
08/06/2013	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - Records Management Services
08/07/2013	Concur	Laurence Brewer	Director, National Records Management Program	National Archives and Records Administration - National Records Management Program
08/07/2013	Approve	David Ferrero	Archivist of the United States	Office of the Archivist - Office of the Archivist