

## Request for Records Disposition Authority

Records Schedule Number DAA-0058-2017-0003

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 Wage and Investment Division (W&I), Stakeholder Partnerships, Education and Communication (SPEC)

Schedule Subject Link and Learn Taxes System Data

Internal agency concurrences will be provided No

Background Information Link & Learn Taxes is a fully leveraged e-learning course developed by Stakeholder Partnerships, Education and Communication (SPEC) for the IRS Volunteer Return Preparation Program. The course is intended as a self-learning vehicle for IRS partners and volunteers worldwide.

### 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Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items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

0001

## Outline of Records Schedule Items for DAA-0058-2017-0003

Sequence Number

1

**Link and Learn Taxes System Data**

Disposition Authority Number: DAA-0058-2017-0003-0001

## Records Schedule Items

Sequence Number					
1	<p><b>Link and Learn Taxes System Data</b></p> <p>Disposition Authority Number      DAA-0058-2017-0003-0001</p> <p>The Link &amp; Learn Taxes system is a learning tool used by IRS partners. It also has a certification instrument (test) which the user/volunteer takes to demonstrate their proficiency in providing tax return preparation assistance to taxpayers. System users must register with the system by creating user-name, password, and e-mail address. This information is then used by the user when logging into the system and kept in their account information. The registry would be valid for a single tax year. Volunteers who are certified through the Link and Learn certification instrument will have the data accumulated and available to the affiliated volunteer organization, and a listing will be available by Area and Territory. Each Territory can obtain a report of the volunteers in their Territory who have been certified through testing. The testing instrument and volunteer registry update only need to be maintained for one tax year. Due to changing tax laws, forms, and volunteers; users need to re-certify every year by passing the certification instrument.</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?      Yes</p> <p>Do any of the records covered by this item exist as structured electronic data?                      Yes</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>RCS 29, Item 448</td> <td>IRS RCS for Tax Administration- Wage and Investment</td> </tr> </tbody> </table> <p><b>Disposition Instruction</b></p> <p>Cutoff Instruction                      Cutoff data at the end of the calendar year</p> <p>Retention Period                        Destroy 1 year(s) after cutoff</p> <p><b>Additional Information</b></p> <p>GAO Approval                            Required and Received</p>	Manual Citation	Manual Title	RCS 29, Item 448	IRS RCS for Tax Administration- Wage and Investment
Manual Citation	Manual Title				
RCS 29, Item 448	IRS RCS for Tax Administration- Wage and Investment				

## 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
08/15/2017	Certify	Tracee Taylor	IRS Records Officer	Privacy, Governmental Liaison and Disclosure - Records and Information Management
02/02/2018	Return for Revision	Andreea Vlaicu	Archives Specialist	National Archives and Records Administration - Records Management Operations Appraisal Team 1
07/27/2018	Submit For Certification	Tracee Taylor	IRS Records Officer	Privacy, Governmental Liaison and Disclosure - Records and Information Management
07/30/2018	Certify	Tracee Taylor	IRS Records Officer	Privacy, Governmental Liaison and Disclosure - Records and Information Management
09/25/2018	Submit for Concurrence	Andreea Vlaicu	Archives Specialist	National Archives and Records Administration - Records Management Operations Appraisal Team 1
10/02/2018	Concur	Rachel BanTonkin	Supervisory Archives Specialist	National Archives and Records Administration - ACR1
10/10/2018	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services
10/11/2018	Approve	David Ferriero	Archivist of the United States	Office of the Archivist - Office of the Archivist