

Request for Records Disposition Authority

Records Schedule Number DAA-0058-2017-0023
 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 Services and Enforcement
 Schedule Subject eWorkforce Management (eWFM) System
 Internal agency concurrences will be provided No

Background Information eWFM is a scheduling and forecasting tool used by the Joint Operations Center (JOC) to provide guidance and support for telephone operations, technology management, and automated inventory processing for Small Business/Self-Employed (SBSE) Campus Collection, SBSE Campus Examination, and W&I Accounts Management. The JOC Program Manager reports directly to the Director, Collection Quality & Technical Support. The JOC Liaison staff has three areas of responsibility: telephone operations, technology management, and tool development. The eWFM program falls under telephone operations. Since 1999, W&I Accounts Management, SBSE, and Compliance Services have used this application to schedule and track staffing required to answer scheduled calls. After scheduling the workload and the required staffing to answer those calls, the application also compares near real-time information from the Automated Call Distributor (ACD) to track each scheduled site's adherence to telephone manpower schedule.

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Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items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-0058-2017-0023

Sequence Number

1

eWorkforce Management System Data Disposition Authority Number: DAA-0058-2017-0023-0001
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Records Schedule Items

Sequence Number					
1	<p>eWorkforce Management System Data</p> <p>Disposition Authority Number DAA-0058-2017-0023-0001</p> <p>System data consists of IRS Telephone Customer/Collection Service Representative (CSR) Agent name, Agent ID number, Agent extension, Agent work schedules, Agent manager's name, Agent skills group, Agent Standard Employee Identification (SEID) and Agent historical data. This data is used to schedule telephone adherence schedules to meet forecast call demand to the IRS call centers.</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>IRS RCS 22, Item 57</td> <td>INTERNAL REVENUE SERVICE RECORDS CONTROL SCHEDULE (RCS) 22-TAX ADMINISTRATION - COMPLIANCE</td> </tr> </tbody> </table> <p>Disposition Instruction</p> <p>Cutoff Instruction Cutoff data at the end of the calendar year</p> <p>Retention Period Destroy 7 year(s) after cutoff</p> <p>Additional Information</p> <p>GAO Approval Not Required</p>	Manual Citation	Manual Title	IRS RCS 22, Item 57	INTERNAL REVENUE SERVICE RECORDS CONTROL SCHEDULE (RCS) 22-TAX ADMINISTRATION - COMPLIANCE
Manual Citation	Manual Title				
IRS RCS 22, Item 57	INTERNAL REVENUE SERVICE RECORDS CONTROL SCHEDULE (RCS) 22-TAX ADMINISTRATION - COMPLIANCE				

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
12/13/2017	Certify	Tracee Taylor	IRS Records Officer	Privacy, Governmental Liaison and Disclosure - Records and Information Management
03/29/2018	Submit for Concurrence	Rania Mahmoud	Appraisal Archivist	National Archives and Records Administration - Records Management Services
03/29/2018	Concur	Rachel BanTonkin	Supervisory Archives Specialist	National Archives and Records Administration - ACR1
04/04/2018	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services
04/05/2018	Approve	David Ferriero	Archivist of the United States	Office of the Archivist - Office of the Archivist