

Request for Records Disposition Authority

Records Schedule Number DAA-0058-2020-0002
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 (SB/SE)
Schedule Subject Form 8973, Certified Professional Employer Organization/Customer Reporting Agreement

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of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items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

GAO Approval

Outline of Records Schedule Items for DAA-0058-2020-0002

Sequence Number

1

Form 8973, Certified Professional Employer Organization/Customer Reporting Agreement

Disposition Authority Number: DAA-0058-2020-0002-0001

Records Schedule Items

Sequence Number						
1	<p>Form 8973, Certified Professional Employer Organization/Customer Reporting Agreement</p> <p>Disposition Authority Number DAA-0058-2020-0002-0001</p> <p>This form is used by a Certified Professional Employer Organization (CPEO) to notify the IRS that a service contract between the CPEO and a customer has started or ended. This form can also be used to correct a previously filed Form 8973. The initial form filing, and all subsequent form filings (including Forms 8973 correcting and/or ending a service contract) should be filed/associated with one another.</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>Document 12990, RCS 23</td> <td>IRS Records Control Schedules (RCS), RCS 23 for Tax Administration - Examination</td> </tr> </tbody> </table> <p>Disposition Instruction</p> <p>Cutoff Instruction Cut off at the end of the calendar year in which the service contract ended (as indicated in Part 1 of Form 8973), or CPEO status was revoked, whichever earlier.</p> <p>Retention Period Destroy 4 year(s) after cutoff.</p> <p>Additional Information</p> <p>GAO Approval Not Required</p>		Manual Citation	Manual Title	Document 12990, RCS 23	IRS Records Control Schedules (RCS), RCS 23 for Tax Administration - Examination
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Document 12990, RCS 23	IRS Records Control Schedules (RCS), RCS 23 for Tax Administration - Examination					

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
02/20/2020	Certify	Tracee Taylor	IRS Records Officer	Privacy, Governmental Liaison and Disclosure - Records and Information Management
07/10/2020	Submit for Concurrency	Esther Hidalgo	Archivist	National Archives and Records Administration - ACR1 AC Appraisal Team 1
08/06/2020	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services
08/11/2020	Concur	Laurence Brewer	Chief Records Officer	National Records and Archives Administration - National Records and Archives Administration
08/11/2020	Approve	David Ferriero	Archivist of the United States	Office of the Archivist - Office of the Archivist