

REQUEST FOR RECORDS DISPOSITION AUTHORITY (See Instructions on reverse)		LEAVE BLANK (NARA use only)	
		JOB NUMBER N1-058-07-7	
TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NWML) 8601 ADELPHI ROAD, COLLEGE PARK, MD 20740-6001		DATE RECEIVED 5/17/07	
1 FROM (Agency or establishment) Department of the Treasury		NOTIFICATION TO AGENCY	
2 MAJOR SUBDIVISION Internal Revenue Service		In accordance with the provisions of 44 U S C 3303a the disposition request, including amendments, is approved except for items that may be marked "disposition not approval" or "withdrawn" in column 10	
3 MINOR SUBDIVISION National Taxpayer Advocate			
4 NAME OF PERSON WITH WHOM TO CONFER Tracee Taylor	5 TELEPHONE 202-283-9291	DATE 5/17/07	ARCHIVIST OF THE UNITED STATES Allen W. [Signature]
5 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 on the attached <u>2</u> pages(s) are not now needed for the business of this agency or will not be needed after the retention periods specified, and that written concurrence from the General Accounting Office, under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies, [Redacted] is not required, [Redacted] is attached, or [Redacted] has been requested			
DATE 5/9/2007	SIGNATURE OF AGENCY REPRESENTATIVE [Signature] IRS Records Officer Daniel W. Bennett		TITLE IRS Records Officer National Office, OS:A:RE:SC Washington, DC 20224
7 ITEM NO	8 DESCRIPTION OF ITEM OF PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	IRM 1.15.9 Records Control Schedule for Taxpayer Advocate New Item 10. Taxpayer Advocate Service Customer Outreach System (TAS COS) See attached.		
SA 8/13/07 copies sent to Agency, NARA, NR			

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**IRM 1.15.9, New Item 10:
Taxpayer Advocate Service Customer Outreach System
(TAS COS)**

Description:

TAS COS is used to plan and record local and national outreach efforts. It is also used to track resources spent for these events to further improve TAS outreach strategies and budgeting.

Background:

The Taxpayer Advocate Service (TAS) is an independent organization within the IRS created by Congress to help taxpayers with Federal tax problems, particularly when resolution cannot be reached through regular IRS channels and TAS criteria are met. This criteria includes taxpayers facing significant economic burden or immediate threat of adverse action, taxpayers facing a delay of more than 30 days to resolve an issue, and taxpayers promised responses or resolution deadlines by the IRS that have not been met.

As reflected in the Restructuring and Reform Act of 1998 (RRA 98), TAS must ensure that taxpayers are aware of TAS and have access to its services. One way TAS accomplishes this is through local and national outreach. The TAS Customer Outreach System (TAS COS) is used to plan and record these outreach events and the resources spent on these efforts. This data is used for the TAS strategic plan, including planning and budgeting future outreach events. TAS COS upgrades an existing stand alone Access desktop application with a centralized web-based application

No taxpayer data is collected, shared or stored in TAS COS.

A. Inputs:

Information about outreach events is manually input into TAS COS by TAS users who are verified electronically from IRS Enterprise Directory services and who have been granted the appropriate permissions by the TAS COS Systems Administrator.

Disposition: Temporary Delete/destroy after input verification into TAS COS master files

B. Master Files:

Maintains data relevant to local and national outreach efforts, and resources spent. Outreach may include visits to government officials and their staff, tax organizations, and various local and state organizations. Each outreach effort is recorded in TAS COS and may include the following information: organizational or event titles, contact information, event dates, reason for outreach activity, specific concerns, and follow-up actions. Data also includes system user information to manage access and authorization, as well as audit trail information used to ensure integrity of event scheduling and completion, and resource allocations.

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Disposition: Temporary. Cut off at end of fiscal year. Delete 3 years, 3 months after cutoff.

C. Outputs:

Ad hoc screen shots and reports relating to outreach events, their status (e.g pending, completed, rejected or approved), and associated resources spent (e.g. monies and hours).

Disposition: Temporary Delete/destroy when superseded, obsolete, or when no longer needed.

D. System Documentation:

Code books, record layouts, user guides and manuals

Disposition: Temporary Delete/destroy when superseded, obsolete, or when no longer needed.