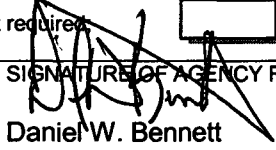


<b>REQUEST FOR RECORDS DISPOSITION AUTHORITY</b> <i>(See Instructions on reverse)</i>		<b>LEAVE BLANK (NARA use only)</b>	
<b>TO: NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NWML)</b> 8601 ADELPHI ROAD, COLLEGE PARK, MD 20740-6001		<b>JOB NUMBER</b> <p style="text-align: center;"><b>N1-58-09-32</b></p>	
<b>1. FROM (Agency or establishment)</b> Department of the Treasury		<b>DATE RECEIVED</b> <p style="text-align: center;"><b>6/1/09</b></p>	
<b>2. MAJOR SUBDIVISION</b> Internal Revenue Service		<b>NOTIFICATION TO AGENCY</b>  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request, including amendments, is approved except for items that may be marked "disposition not approval" or "withdrawn" in column 10.	
<b>3. MINOR SUBDIVISION</b> Transition Management Office (TMO)			
<b>4. NAME OF PERSON WITH WHOM TO CONFER</b>  Tracee Taylor (RIM Program Office) Mitchelle Hunter (TMO)	<b>5. TELEPHONE</b>  202-435-6308 202-283-3308	<b>DATE</b>  <b>11-9-09</b>	<b>ARCHIVIST OF THE UNITED STATES</b>  <i>Adrianne C. Thomas</i>
<b>5. AGENCY CERTIFICATION</b>  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, <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <span><input type="checkbox"/> is not required.</span> <span><input type="checkbox"/> is attached; or</span> <span><input type="checkbox"/> has been requested.</span> </div>			
<b>DATE</b>  <b>5/27/2009</b>	<b>SIGNATURE OF AGENCY REPRESENTATIVE</b>  <b>IRS Records Officer</b> Daniel W. Bennett		<b>TITLE</b> IRS Records Officer National Office, OS:A:RE:L 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 GRS OR SUPERSEDED JOB CITATION	10.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)
	<b>RCS 1.15.17, Records Control Schedule for Information Technology</b> <sup>27</sup> <b>New Item 26, Transition Management Repository</b>  *1.15.35, Item 68 (IRM 1.15.35 is a cross-walk of electronic systems to official IRS Records Control Schedules.)  (see attached)		

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1

**IRM 1.15.17, New Item 26**  
**Transition Management Repository (TMR)**

**Background:**

The Transition Management Office (TMO) developed the Transition Management Repository (TMR) as a web-based project management tool for IRS projects and receiving organizations to use for transitioning new or modified systems from the developing organization to IRS. The purpose of TMR is to manage transition data necessary (and required as part of the Enterprise Life Cycle (ELC) process) to move from the current to the new business environment. The transition management process helps receiving organizations consider the organizational requirements for supporting the future state such as evaluating four main readiness categories: people, process, assets, and financials. The data is entered through a web page (via TMR input screen tabs) and housed in a database.

The TMO is in the process of retiring the system. Master data files date from February 2008. All TMR data will be converted to template Transition Management Plan (TMP) Word files, and stored on TMO's SharePoint site. Users can view all Major and non-Major projects assigned to them by clicking on the project name to continue normal processing within the TMR to edit or view their document(s). In the new SharePoint environment, completion of the TMPs will be principally manual driven. Project staff will manually prepare/update the TMP using the Word Template.

**Description:**

The Transition Management Repository (TMR) is a web-based project management tool for IRS projects and receiving organizations to manage data necessary to move new or modified systems from the current to the new business environment. The system is planned for retirement in FY 2009. Previous users are directed to follow the disposition authority and retention for Transition Management Plans (TMPs) as specified below.

**a. Inputs:**

TMR receives electronic transfers of extracts from various IRS sources, including employee data from the Discovery Directory and specific project analysis from the Project Engineering Analysis and Reporting System (PEARS).

Records also include information obtained from the IRS Enterprise Architecture relating to organizations, processes, procedures, and user roles.

Disposition: Temporary. Delete after input verification into TMR master files. Recordkeeping copies of this data are appropriately scheduled under other IRS authorities for specific systems and/or sources providing input.

**b. System Data (Master Files):**

Contains project-specific data that describes the receiving organization, the current and future description of the project, and any gaps identified that may impact the transition of the project.

GRS 20

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Disposition: Temporary. Delete when superseded, obsolete or no longer needed, whichever is later.

**c. Outputs:**

The principle output is a Word document formatted as a Transition Management Plan (TMP) template. The transition management process uncovers gaps between receiving organization current environment and the future environment created by delivery of new or enhanced systems. The process results in a detailed plan for managing each gap to closure.

Other outputs include extract reports that provide various types of information based on the query.

1. Transition Management Plans (TMP).

Disposition: Temporary. Retain TMPs until obsolete or no longer needed. Destroy all TMPs no later than three years after final system shutdown.

*Note: Current MITS business practice is to retain TMPs for the last three system releases.*

2. All other reports.

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

**d. System Documentation:**

Includes the Computer Operators Handbook (COH), Transition Management Guide, and Transition Management User Guide.

Disposition: Temporary. Delete/destroy when superseded or 3 years after the system is terminated, whichever is later.

Exception to  
GRS 20  
Item 11(a)2