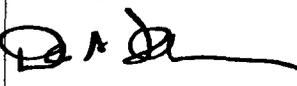
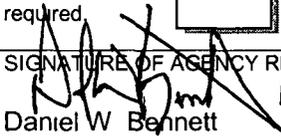


REQUEST FOR RECORDS DISPOSITION AUTHORITY (See Instructions on reverse)		LEAVE BLANK (NARA use only)	
TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NWML) 8601 ADELPHI ROAD, COLLEGE PARK, MD 20740-6001		JOB NUMBER N1-58-09-46	
1 FROM (Agency or establishment) Department of the Treasury		DATE RECEIVED 7/7/09	
2 MAJOR SUBDIVISION Internal Revenue Service		NOTIFICATION TO AGENCY	
3 MINOR SUBDIVISION		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request, including amendments, is approved except for items that may be marked "disposition not approval" or "withdrawn" in column 10	
4 NAME OF PERSON WITH WHOM TO CONFER Tracee Taylor (RIM Program Office)	5 TELEPHONE 202-435-6308	DATE 14 Feb 10	ARCHIVIST OF THE UNITED STATES 
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>3</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, <input type="checkbox"/> is not required, <input type="checkbox"/> is attached, or <input type="checkbox"/> has been requested			
DATE 7/1/2009	SIGNATURE OF AGENCY REPRESENTATIVE  Daniel W Bennett IRS Records Officer		TITLE 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7 ITEM NO	8 DESCRIPTION OF ITEM OF PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	<p>RCS 1.15.29 Submissions Processing Campus Records</p> <p>New Items</p> <p>Item 196, <u>Form 4442 Report – Account Referrals</u></p> <p>Item 424, <u>Workload Information Tracking System (WITS)</u></p> <p>* RCS 1.15.35 Tax Administration Electronic Systems</p> <p>Add pointer to Item 424 in RCS 1 15 29</p> <p>RCS 1 15 35 is a cross-walk of electronic systems to official IRS Records Control Schedules</p> <p>(see attached)</p>		

IRM 1.15.29 Submissions Processing Campus Records

Item 196, Form 4442 Report – Account Referrals

Item 424, Workload Information Tracking System (WITS)

Background:

The Workload Information Tracking System (WITS) is a Wage and Investment (W&I) system in the process of being retired. Master data files date from 2005 - 2009. IRS Campus employees assigned to Customer Service Sites started using a new data collection process (Web-based spreadsheet) with the data beginning weekending 3/28/09. The data for Fiscal Year 2009, has already migrated forward to the new system. The dates of WITS data migrated forward are 10/4/2008 to 03/28/09. Data is entered by each Site into a spreadsheet for the site and maintained on a shared network drive. The data from each Site is then consolidated into one spreadsheet and reported on the Joint Operations Center (JOC) Website.

1

Item 196. Form 4442 Reports – Account Referrals

Data from these spreadsheet reports provides statistics regarding taxpayer requests for information relating to his/her tax return, and IRS actions. Data from each Campus Site is consolidated into one spreadsheet, which contains the data for all Sites. The consolidated spreadsheet is published on the Joint Operations Center (JOC) Website.

Each spreadsheet has a weekending date. The data is entered into the spreadsheet at the beginning of each week. A dropdown box is provided so users can select the weekending for generation of reports.

a) Spreadsheet for each Campus Site.

Disposition: Temporary. Transmit weekly spreadsheet to JOC. Delete when no longer needed for operational purposes

b) Consolidated spreadsheet.

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

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

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Item 424. Workload Information Tracking System (WITS)

The Workload Information Tracking System (WITS) is an on-line system which provides statistics regarding the quality of information collected in response to taxpayer inquiries.

Note: This system is planned for retirement in Fiscal Year 2009. Previous users are now directed to follow a new data collection process and disposition instructions as specified in Item 196 of this Schedule for Form 4442 Reports – Account Referrals.

a. Inputs:

~~Customer referral data collected by Customer Service Representatives) is electronically transmitted from IRS Campuses using interactive screens on a daily and weekly basis.~~

Disposition: Temporary. Delete after input verification into WITS master files.

b. System Data (Master Files):

Data is statistical in nature - referrals or questions made by taxpayers that could not be resolved or answered immediately. WITS tracks the number of referrals received, the number of referrals closed or answered, and the number of aged referrals (those cases not closed or answered timely).

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

c. Outputs:

~~WITS provides users with timely reports and the ability to generate reports by selection of subsets. It governs two data types: Referral Inventory (INV) and Field Assistance (FA). Reports may be accessed on a daily, weekly or monthly basis and are accessible on a cumulative (summary) or non-cumulative level for Field Operation, Wage Investment and Small Business, Customer Service Centers and their call sites.~~

~~1. Referral Inventory - Form 4442 (Closed Problem Inquiry File) that is generated when a taxpayer's inquiry or question cannot be resolved or answered~~

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GRS 20

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

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immediately. WITS captured the number received, closed, and aged from each site.

2. Field Assistance – Form 4442 that is generated by an employee servicing a taxpayer at a Taxpayer Assistance Center (Walk-In office).

Disposition: Temporary. Destroy/Delete when no longer needed in current operation. (Job No. NC1-58-80-6, Item 192)

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.

*except to
GRS 20
Item 11*