
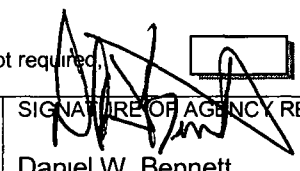


REQUEST FOR RECORDS DISPOSITION AUTHORITY (See Instructions on reverse)		LEAVE BLANK (NARA use only)	
		JOB NUMBER N1-058-09-51	
TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NWML) 8601 ADELPHI ROAD, COLLEGE PARK, MD 20740-6001		DATE RECEIVED 7/10/09	
1 FROM (Agency or establishment) Department of 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request, including amendments, is approved except for items that may be marked "disposition not approval" or "withdrawn" in column 10	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 Deputy Commissioner for Services and Enforcement (DCSE)			
4 NAME OF PERSON WITH WHOM TO CONFER Daniel W Bennett, IRS Records Officer Jynell P Spriggs Merlene Burnham		5 TELEPHONE 202-435-6337 202-927-4184 202-622-4003	DATE 10/10/12
		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>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, <input type="checkbox"/> is not required, <input type="checkbox"/> is attached, or <input type="checkbox"/> has been requested			
DATE 7/10/2009	SIGNATURE OF AGENCY REPRESENTATIVE  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7 ITEM NO	8 DESCRIPTION OF ITEM OF PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	<p>RCS 1.15.33 for Records Control Schedule for Legislative Affairs</p> <p>Future Updates:</p> <ul style="list-style-type: none"> • Adds new Item 12 for the <i>Legislative Analysis, Tracking and Implementation Services (LATIS) Taxpayer Assistance Blueprint (TAB) Application</i> • Item 12 Legislative Analysis, Tracking and Implementation Services (LATIS) Taxpayer Assistance Blueprint (TAB) Application <p>Sub-Items</p> <ul style="list-style-type: none"> • a Inputs b. Outputs c Data d Systems Documentation <p>RCS 1.15.35 Records Control Schedule for Tax Administration – Systems (Electronic)</p> <p>a.) Add new pointer to Item 12 in RCS 1.15 33</p> <p>The records are owned by the Deputy Commissioner for Services and Enforcement (DCSE) and processed by the Memphis Computing Center (ECC-MEM).</p> <p><i>See the attached</i></p>		

Background:

The IRS Commissioner has a requirement to currently manage, coordinate, and track significant actions and high level inquiries and documents across the IRS Business Units. A COTS product, i-Trak, was procured to fulfill the requirement. The i-Trak system was upgraded to the e-Trak Web-based COTS product in September 2009. With the initial introduction into operational service, the e-Trak Software will include four application modules: Whistleblower, LATIS, GARNISH, and Correspondence. These modules are consolidations that replace existing independent IRS legacy software. The IRS Taxpayer Assistance Blueprint (TAB) Module was not transferred to the upgraded system. All TAB records have been archived. The TAB Initiative was a short term project, unlike the Public Law and Tax Gap Modules. The initiatives were completed by the time the system was upgraded, so it was not necessary to transfer the TAB Module. The TAB records are stored on a file with the system administrator.

Legislative Analysis, Tracking and Implementation Services Taxpayer Assistance Blueprint Application

Description:

Taxpayer Assistance Blueprint (TAB) is a Legislative Analysis, Tracking and Implementation Services (LATIS) e-Trak Application used to track the IRS Taxpayer Assistance (TAB) Initiatives, components, required tasks, proposal status, and the associated Milestones. This is a set of Congressional mandates which require reporting to various sub-committees of Congress. These actions are needed to be taken in order to provide the subsequent quarterly reports on the status of the TAB initiatives to Congress.

A. Inputs:

The Taxpayer Assistance Blueprint (TAB) receives inputs manually from various sources including correspondence, memoranda, e-mail, reports and publications.

Disposition TEMPORARY Not Applicable. The Official Records of all inputs are appropriately scheduled under various items in Records Control Schedules 8, 9, and 33.

B. System Data:

Contents of the Taxpayer Assistance Blueprint (TAB) Application include, but are not limited, to the following: Proposed Actions, Individual Action Plans, Milestones, Actions needed to be taken to implement legislation that impacts the IRS Taxpayer Assistance Blueprint (TAB), and current status of each action. LATIS maintains the list of actions required of all organizations of the IRS. In this way, the actions may be tracked from initiation to completion, while allowing for updates, follow-up, and notification or inquiry if items are not addressed timely or otherwise are at risk.

Disposition PERMANENT. Cut off files at end of Taxpayer Assistance Blueprint Initiative. Transfer to the National Archives 20 years after cutoff.

fling instructions

Added to 40 years after cutoff per discussion w/ records office 1/9/2012 emc 1/9/12

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	<p>C Outputs.</p> <p>Outputs from the Taxpayer Assistance Blueprint (TAB) Application include a variety of reports Documentation generated from eTrak supported Applications including the Legislative Analysis, Tracking Implementation Services (LATIS) Applications consist of weekly and/or biweekly reports of activities, status, trends, and statistics Documentation also provides reports to the current status of service-wide actions/activities in supporting taxpayer assistance</p> <p><i>Disposition TEMPORARY Delete/Destroy when obsolete or no longer needed</i></p> <p>D System Documentation</p> <p>System Documentation for the Public Law Module consists of e-Trak codebooks, records layout, user guide, and other related materials</p> <p><i>Disposition PERMANENT Cut off files at end of Taxpayer Assistance Blueprint Initiative Transfer to the National Archives 20 years after cutoff</i></p>		<p>QAS 20.11a2</p> <p>Attended to "10 years after cutoff" per discussion w/ records office 1/19/2012</p> <p>00 gmc 1/19/2012</p>
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