REQUEST FOR RECORDS DISPOSITION AUTHORITY	JOB NUMBER N1-058-09-57
To NATIONAL ARCHIVES & RECORDS ADMINISTRATION 8601 ADELPHI ROAD COLLEGE PARK, MD 20740-6001	Date received 7/23/09
1 FROM (Agency or establishment) Department of Treasury	NOTIFICATION TO AGENCY
2 MAJOR SUBDIVISION Internal Revenue Service (IRS)	
3 MINOR SUBDIVISION Human Capital Office (HCO)	

4 NAME OF PERSON WITH WHOM TO CONFER	5 TELEPHONE NUMBER	DATE	ARCHIVIST OF THE UNITED STATES
Daniel W. Bennett John A Cholod	(202) 435-6337 (202) 283-0989	11-18-09	Adrienne C. Thomas

6 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 ___2__ page(s) are not needed now for the business for 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,

☒ is not requested ☐ is attached, or ☐ has been requested

DATE	SIGNATURE OF AGENCY REPRESENTATIVE	TITLE
7/22/2009	Daniel W Bennett IRS Records Officer	IRS Records Officer National Office, OS A RE SC Washington, DC 20224

7 ITEM NO	8 DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	RCS 1.15.38 for General Records Schedule for Civilian Personnel Records **Future Updates:** • **Adds new IRS Item (new Number 44) for *Benefits and Services Team Tracking System (BeSTTrac)*** • **Item 44 Benefits and Services Team Tracking System (BeSTTrac)** **Sub-Items** • **a. Inputs b. Outputs c. Data d. Systems Documentation** **RCS 1.15.35 for Tax Administration Electronic Systems** **a.) Add new pointer to Item 44 in RCS 1.15.38** **The records are owned by the Human Capital Office, Workforce Progression and Management (WPM) Branch and processed by the Enterprise Computing Center – Memphis.**		

	Background: *Benefits and Services Team Tracking System (BeSTTrac) is an intranet based application which provides a centralized database for entering and monitoring the status of different employee case types (i e , Retirement, Death, Pre-retirement Estimates, Post 56 Military, Disability Determinations, Change in Retirement Plan, Deposit into Retirement Plans, Open Season Issues, FEGLI and FEHB Determinations) BeSTTrac allows for the generation and downloading of detailed and summary reports Reports are used to manage cases (what has been done and when), inform management of caseload per specialist, provide information on the number of retirements per operating division, number of cases worked to BeST site management and personnel management, timeliness of processing cases, cycle time of processing cases, and age of cases BeSTTrac supports the Agency's responsibility to administer federal benefits to IRS employees under CFR, Title 5 Administrative Personnel, Chapter 1, Parts 792, 800-899 The BeSTTrac application production and development environment hardware physically resides at the ECC-MEM. The application is installed a Dell PowerEdge server running Windows 2003 operating system and Structured Query Language 2003 Database Management System (DBMS) installed*		
RCS/38, Item 44	**Benefits and Services Team Tracking System (BeSSTrac)** **Description:** Benefits and Services Team Tracking System (BeSTTrac) is an intranet based application which provides a centralized database for entering and monitoring the status of different employee case types (i e , Retirement, Death, Pre-retirement Estimates, Post 56 Military, Disability Determinations, Change in Retirement Plan, Deposit into Retirement Plans, Open Season Issues, FEGLI and FEHB Determinations) **A. Inputs:** Data for the Benefits and Services Team Tracking System (BeSTTrac) is extracted from the Treasury Integrated Management Information System (TIMIS) and used to populate BESTTrac employee profiles The sources of information are documents and applications submitted by employees and documents retrieved from employees Official Personnel Folder This information is entered into the BESTTrac system by Retirement Specialists or assistants or other personnel assigned to the Benefits and Services Team *Disposition: TEMPORARY Cut off upon retirement or separation of employee Destroy/Delete 75 years after cutoff.*	NEW	

B. System Data:

The Benefits and Services Team Tracking System (BeSTTrac) contains benefits cases opened by Benefits and Services Team personnel from 1997 to present Case information includes Employee Name, SSN, Case/Retirement/Action Type, Dates Opened/Closed, Retirement system, Due Date, Specialist Assigned, Reviewer, Modification history and Case history

Disposition TEMPORARY Cut off upon retirement or separation of employee Destroy/Delete 75 years after cutoff

C. Outputs:

The Benefits and Services Team Tracking System (BeSTTrac) allows a user to print out the Case Information and History Screen with the option to print the Employee Profile This information is used to populate a physical case file subject to IRS retention standards Users may also use Business Objects Reporting system to create reports from the data to manage inventory and identify trends The information is not shared with other systems Reports are used within the Benefits and Services Team to manage inventory Summary reports (with no identifying information) are used to report case closures, case open inventory, etc to Health Care Organization (HCO) management in regular and ad hoc reports

Disposition. TEMPORARY Delete/Destroy after 2 years or when no longer needed for administrative, investigative, legal, audit or other operational purposes after case is closed

D. Documentation

Exception to GRS 20 | 11a1

System Documentation for the Benefits and Services Team Tracking System (BeSTTrac) consists of codebooks, records layout, user guide, and other related materials

Disposition TEMPORARY Delete/destroy when superseded or 5 years after the system is terminated, whichever is later