

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 <b>N1-058-09-81</b>	
1. FROM (Agency or establishment) Department of the Treasury		DATE RECEIVED <b>8/18/09</b>	
2. MAJOR SUBDIVISION Internal Revenue Service		NOTIFICATION TO AGENCY	
3. MINOR SUBDIVISION Tax Advocate Service (TAS), Business Systems Planning		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request, including amendments, is approved except for items that may be marked "disposition not approval" or "withdrawn" in column 10.	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 Daniel W. Bennett, IRS Records Officer Nancy A. Hellmann Glenn M. Banks		5. TELEPHONE 202-435-6337 859-669-5539 804-916-3547 DATE ARCHIVIST OF THE UNITED STATES <i>LRCO9 [Signature]</i>	
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 <b>8/18/2009</b>		SIGNATURE OF AGENCY REPRESENTATIVE <i>[Signature]</i> Daniel W. Bennett IRS Records Officer 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 GRS OR SUPERSEDED JOB CITATION	10.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><b>RCS 1.15.9 for Records Control Schedule for Tax Advocate Service</b></p> <p>Future Updates:</p> <ul style="list-style-type: none"> <li>• Adds new Item 13 for the <i>Tax Advocate Management Information System (TAMIS)</i></li> </ul> <p>Item 13 Tax Advocate Management Information System (TAMIS) Sub-Items</p> <ul style="list-style-type: none"> <li>• a. Inputs b. Outputs c. Data d. Systems Documentation</li> </ul> <p><b>RCS 1.15.35 Records Control Schedule for Tax Administration – Systems (Electronic)</b></p> <p>a.) Add new pointer to Item 13 in RCS 1.15.9</p> <p>The records are owned by the Tax Advocate Service (TAS).</p> <p><i>See the attached</i></p>		

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**Background:**

The Taxpayer Advocate Management Information System (TAMIS) is the primary database/system that Taxpayer Advocate Service (TAS) employees use to record and manage all case activity involving the handling and resolution of taxpayer significant hardship cases and other tax problems that fall within the National Taxpayer Advocate's jurisdiction and legislative mandate (Internal Revenue Code Sections 7803 (c) (2) (A) (i) and 7811).

Taxpayer Advocate Management Information System (TAMIS) is the database of the Taxpayer Advocate Service (TAS) that is exclusively dedicated to the recordation, control and processing of TAS taxpayer cases and to the capturing and analysis of core tax issues, laws, policies and internal IRS functional processes that are the sources of taxpayer significant hardship and other critical problems.

TAMIS records and tracks TAS activity and performance in carrying out its statutory role of assisting taxpayers experiencing problems and hardships with the IRS. TAMIS is a critical data source for the National Taxpayer Advocate's Annual Report to Congress, for internal feedback reporting to the operating divisions and other functional areas and for proposing remedies to correct and cure inequitable tax legislation and internal IRS systemic processes that negatively impact the taxpaying public.

The system applications are computerized inventory control and report systems developed: 1) For the Taxpayer Advocate Service case worker. 2) To produce inventory and other MIS reports to support management. The Customer Feedback System (CFS) is now obsolete and has been removed from production.

**Tax Advocate Management Information System (TAMIS)**

IRM  
1.15.9,  
Item 13

NEW

**Description:**

The Tax Advocate Management Information System (TAMIS) is an automated, computerized application used to record, control, process, analyze, and report on Taxpayer Advocate Service (TAS) case inventories. It also maintains a data repository for report generation.

**A. Inputs:**

Tax Advocate Service (TAS) staff input information into the Tax Advocate Management Information System (TAMIS) derived from direct communication through the telephone, FAX, mail, e-mail, or walk-in/face-to-face contacts, and IR Form 911, Request for Taxpayer Assistance Order, or an E-911 (Electronic Form 911) from Accounts Management Services (AMS).

~~Disposition: TEMPORARY. Delete/Destroy all cached records after successful entry and verification.~~

ARS 20

\*Note - Staff should reference Records Control Schedule 31

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(IRM 1.15.31 for paper and electronic IR Forms 911 (NC1-058-83-6, Item 22).

**B. System Data:**

Contents of the Tax Advocate Management Information System (TAMIS) include, but are not limited, to the following: Taxpayer Information (Social Security Number or other Taxpayer Identification Number, name, Address; The Executor's/Power of Attorney's name, address, phone number; tax issue, etc.), Employee Information (Staff Employee Identification Number, Post of Duty, Address, Telephone Number, etc.), Audit Trail Information, and Case Management Information.

**1. Case Management Database**

*Disposition: TEMPORARY. Cut off at end of the Fiscal Year in which case is closed. Delete/destroy 3 years after cutoff.*

**2. Audit Log Database**

*Disposition: TEMPORARY. Cut off at end of the Fiscal Year in which case is closed. Delete/destroy 7 years after cutoff, or when no longer needed for operational purposes, whichever is later.*

**C. Outputs:**

Outputs from the Tax Advocate Management Information System (TAMIS) include case management data which can be transmitted or viewed on the desktop, and reports that can be printed daily. In addition, the Business Performance Management System (BPMS) via Business Objects software extracts key statistical measures from TAMIS on a monthly basis.

*Disposition: Disposition: TEMPORARY. Delete/destroy when no longer needed for operational purposes.*

**D. System Documentation**

System Documentation for the Tax Advocate Management Information System (TAMIS) consists of codebooks, records layout, user guide, and other related materials located in the Functional Specifications Package (FSP) for TAMIS.

*Disposition: TEMPORARY. Delete/destroy when superseded or 5 years after the system is terminated, whichever is sooner.*

*Exception to GRS 20.11*

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PREVIOUS EDITION NOT USABLE

STANDARD FORM 115 (REV. 3-91)  
Prescribed by NARA  
36 CFR 1228