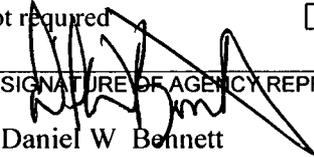


<b>REQUEST FOR RECORDS DISPOSITION AUTHORITY</b>		JOB NUMBER <b>N1-058-09-103</b>	
To: NATIONAL ARCHIVES & RECORDS ADMINISTRATION 8601 ADELPHI ROAD COLLEGE PARK, MD 20740-6001		Date received <b>9/14/09</b>	
1 FROM (Agency or establishment) Department of the Treasury		NOTIFICATION TO AGENCY  In accordance 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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10	
2 MAJOR SUBDIVISION Internal Revenue Service			
MINOR SUBDIVISION Small Business/Self-Employed (SBSE)			
NAME OF PERSON WITH WHOM TO CONFER Tracee Taylor (Records) Thomas Steadman (SBSE)		3 TELEPHONE NUMBER (202) 435-6308 (972) 308-1483	DATE <b>9/14/09</b>
4 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> 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,  <input checked="" type="checkbox"/> is not required <input type="checkbox"/> is attached, or <input type="checkbox"/> has been requested		ARCHIVIST OF THE UNITED STATES 	
DATE <b>9/9/2009</b>	SIGNATURE OF AGENCY REPRESENTATIVE  Daniel W. Bennett		TITLE IRS Records Officer National Office, OS:A.RE:L Washington, DC 20224
7 ITEM NO	8 DESCRIPTION OF ITEM AND PROPOSED DISPOSITION <b>IRM 1.15.23 Records Control Schedule for Tax Administration - Examination</b>  New Item 83: Report Generation Software (RGS)  <b>* IRM 1.15.35 Tax Administration Electronic Systems</b>  Add pointer to Item 83 in RCS 1.15.23 RCS 1.15.35 is a cross-walk of electronic systems to official IRS Records Control Schedules  See attached.	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)

**IRM 1.15.23, New Item 83**

**1**

**Report Generation Software (RGS)**

**Background:**

*Report Generation Software (RGS) is an Internal Revenue Service (IRS) application/system that has been categorized as a Major Application RGS currently resides at selected IRS Service Centers (SC) Campuses and Area Offices (AO) on Windows 2003 platform and has been deployed since 1988.*

*RGS is a comprehensive, integrated program used to automate the examination process. It provides inventory, computations, workpapers and correspondence for examiners as well as an electronic download of Return Transaction File (RTF) return data, electronic upload of assessment and closed case data to the Audit Information Management System (AIMS) and Integrated Data Retrieval System (IDRS), and electronic archiving of closed cases*

*RGS is a Graphical User Interface (GUI) based system that provides support for all types of examiners. Wage and Investment, Small Business/Self-Employed, Tax-Exempt & Government Entities, and Large and Mid-Sized Businesses W&I developed RGS/Batch as an enhancement to RGS to allow for automated processing of large volumes of 1040 cases, primarily Earned Income Tax Credit (EITC) inventory, through the examination process RGS/Batch provides an automated case processing environment that relieves tax examiners of the time-consuming, repetitive task of setting up case files and generating the taxpayer reports and letters in RGS for routine cases.*

*The business objectives for RGS include, improving the case product sent to the taxpayer, reducing computational errors, and reporting correct closing information to the states through Examination Operational Automation Database (EOAD).*

**Description:**

The RGS Data Store contains inventory, computations, workpapers and correspondence for tax examiners as well as Returns Transaction File (RTF) return data, assessment and closed case data.

**a. Inputs:**

Information can be manually entered into RGS by a user or downloaded from a server. The information is in the form of the tax return as originally filed. The data is entered/displayed in Return Setup.

Disposition: Temporary. *Note* - The Individual Master File (IMF)/Individual Transaction File (IRT) are scheduled records under IRM 1.15.29.

Information extracted from the IMF/IRT can be deleted/destroyed upon verification or when no longer needed. Delete/Destroy all cached records after successful entry and verification.

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

The RGS System maintains correspondence sent to the taxpayer, the examination report, case workpapers, case history document, and case closing record.

Disposition: Temporary. Cut off at close of case. Delete 15 years after cutoff.

**c. Outputs:**

Include numerous reports that can be printed to assist tax examiners and managers to monitor individual tax examiner inventories, weekly receipts, case updates, unit inventories, section inventories, and branch inventories.

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

**d. System Documentation:**

The RGS application was developed by third party contractors. As part of the development process, extensive documentation has been developed to cover all aspects of the application. All RGS component documentation is maintained by the Dallas

	<p>Development Site (DDS). Some of the documents that are maintained include implementation guide, server and maintenance guides, as well as system administration guides.</p> <p>Disposition: Temporary. Destroy/Delete when superseded or 5 years after the system is terminated, whichever is earlier.</p>		
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