
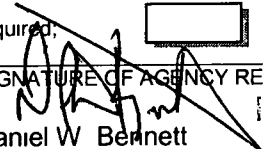


REQUEST FOR RECORDS DISPOSITION AUTHORITY (See Instructions on reverse)		LEAVE BLANK (NARA use only)		
		JOB NUMBER N1-058-09-110		
TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NWML) 8601 ADELPHI ROAD, COLLEGE PARK, MD 20740-6001		DATE RECEIVED 9/16/09		
1 FROM (Agency or establishment) Department 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request, including amendments, is approved except for items that may be marked "disposition not approval" or "withdrawn" in column 10		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 Wage and Investment, Customer Account Services, Electronic Products and Services, Operations Support, Product and Services Support Branch				
4 NAME OF PERSON WITH WHOM TO CONFER Daniel W Bennett, IRS Records Officer Brandy M Mainord Dana L Crockett		5 TELEPHONE 202-435-6337 512-460-8005 770-234-4347	DATE 1422 09	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 9/16/2009	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7 ITEM NO	8 DESCRIPTION OF ITEM OF PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)	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 1.15.19 for Records Control Schedule for the Enterprise Computing Center – Martinsburg (ECC - MTB)</p> <p>Future Updates:</p> <ul style="list-style-type: none"> • Adds new Item 84 for e-Help Support System (EHSS) <p>Item 84 e-Help Support System (URF) 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 84 in RCS 1.15.19</p> <p>The records are owned by the Wage and Investment, Customer Account Services, Electronic Products and Services, Operations Support, Product and Services Support Branch and processed by the Martinsburg Computing Center (ECC-MTB).</p> <p><i>See the attached</i></p>			

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

SAVE BLANK (NARA use only)

JOB NUMBER

N1-058-09-

Background:

Electronic Products and Services Support (EPSS) resides under Wage and Investment (W&I), Customer Account Services. The primary function of EPSS is to provide program management and strategic guidance to the e-Help Desks, which provided technical support assistance to IRS external customers.

The e-Help Desk was deployed in January 2003 as a technical support desk for external customers who use IRS electronic products. Today e-Help is recognized as a key e-government program for IRS modernization projects and has serviced over 1 million calls from tax professionals across the U.S. e-Help Desk customers include electronic return originators, enrolled agents, certified public accountants, e-services users, financial institutions, intermediate service providers, reporting agents, software developers, and transmitters. The e-Help Desk currently supports the following IRS programs: e-file, Modernized e-file, e-services, Income Verification Express Service (IVES), Electronic Federal Tax Payment System (EFTPS); and, Central Contractor Registration (CCR).

e-Help Support System (EHSS)

Description:

The e-Help Support System (EHSS) is a full service support network skilled in providing assistance to external customers who encounter problems using IRS electronic products. E-Help Desk assistors use the E-Help Support System (EHSS) application to document all contacts with third party electronic product users who request E-Help Desk assistance. Additionally, EHSS contains a knowledge database used to resolve the contacts. E-Help System is one of eight automated E-Services systems that support the IRS mission. E-Help Desk Sites include Andover, Austin, Cincinnati, Ogden, and Martinsburg. E-Help assistance and support is provided for the following IRS items: e-Services, Forms 1040 (e-File), Forms 940, 941, 944, Forms 1120, 1041, 1065, Forms 720, 2290, 8849, Electronic Federal Tax Payment System, Central Contractor Registration, as well as a variety of other related subject matters.

A. Inputs:

Assistors create e-cases and record the customer information, problem details, and resolution of the issue. To accurately record the contact, e-Help Support System (EHSS) relies on information contained within the Third Party Data Store (TPDS). TPDS is used to record and monitor the information about e-services users. This application system is part of e-services. With the TPDS Interactive Interface, an interactive system between TPDS and EHSS is created. Customer information is shared with EHSS within 5 seconds of any addition, deletion, or change in TPDS. With the implementation of the Third Party Data Store (TPDS) Interactive Interface, EHSS has access to accurate information on all contacts and fewer "Unregistered" cases will need to be created (exception: EFTPS and CCR customers will always be "Unregistered"). Assistors can now identify and authenticate callers on the call, and track the issue by customer. Since historical data can be researched, root cause analysis can also

IRM
1 15 19,
Item 84

NEW

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

LEAVE BLANK (NARA use only)

JOB NUMBER

N1-058-09-

be performed on customer issues. If you determine that a customer should have been registered in EHSS (i.e., registration confirmed or customer has an EFIN) and the caller is not found, resolve the issue, close the e-case, and assign the e-case to the EHSS Techs Provider Group. EHSS is updated with customer information from Filing Information Returns Electronically (FIRE). EHSS uses the Transmitter Control Code (TCC) to search and authenticate customers.

Disposition TEMPORARY Delete/destroy any cached transmission files after successful entry and verification into the e-Help Support System

B. System Data:

System data in the e-Help Support System (EHSS) contains EHSS contains the name of the employee assigned to the case, the employee log-in information and changes made by the employee (in six basic categories: Individual, Business, Self Employment, eServices, Information Returns Branch and Share), unique case number, Customer (Firm Name), Representative (Firm's designated contact), Customer Phone type and Number, Customer Email type and email Address, Representative Phone Number, Extension and Email Address (if different than the Firms), Customer EFIN and/or ETIN (if applicable), Role type, Forms and T/P Indicator, and Problem Information (Product, Problem Type, Summary, Description, e-Case Type, Priority, e-Case Status, Provider Group, Severity, Source, and staff assigned to)

Disposition TEMPORARY Archive closed case to off-line Data Store 3 years after the end of each processing year in which case was opened Delete/destroy 4 years after case was archived.

C. Outputs:

The e-Help Support System (EHSS) outputs include EHSS e-Help Reports (Weekly Combo, Aged e-Cases, and Products Report), Products by Problem Type Reports, End of Year Reports, e-Case History Reports, and Audit Reports

Disposition TEMPORARY Archive closed case to off-line Data Store 3 years after the end of each processing year in which case was opened Delete/destroy 4 years after case was archived.

D. System Documentation

System Documentation for the e-Help Support System (EHSS) consists of Project Plan, e-Help Assistant Guidelines, code listings, records layout, User Guide, and other related materials

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

GRS 20

ex computer
to CR 20
: then 11