

Background:

The Field Assistance Support Systems are used by IRS Wage & Investment at Taxpayer Assistance Centers (TAC) to assist taxpayers with return preparation, tax questions, resolving account and notice inquiries, and other customer service needs. The Field Assistance Support Systems include the Queuing Management System (QMATIC), Field Assistance Management Information System (FAMIS), and the Field Assistance Contact Recording System (FACR). These systems work together to ensure a highly skilled workforce, increased efficiency for managers, more accurate data, and enhanced customer satisfaction.

Field Assistance Support Systems

A. Inputs:

The QMATIC system intakes information from the taxpayer at a TAC, categorizes the information based on the type of service requested by the customer (i.e. return preparation, tax questions, forms, cash payments, non-cash payments, notices/letters, multilingual interpreter, W-7, Scheduled appointments, etc.) and places the customer in a holding queue for assistance. The system generates statistical data such as customer volume, wait time, and service time.

Disposition: TEMPORARY. Delete/Destroy once data has been entered into the master file or database and verified.

B. System Data

1 Field Assistance Management Information System (FAMIS) receives input data from QMATIC and populates the Form 5311, Field Activity Report to monitor the staff workload and time expenditures for customer assistance. Information in FAMIS includes direct time spent with customers, indirect time spent with customers (i.e. training, read time, leave, etc.), employee name, territory name, POD name, type of employee, type of assistance activity (i.e. phone calls, forms, electronic return preparation, tax law questions, etc.), length of time spent on activity and daily/weekly totals.

Disposition: TEMPORARY. Delete/Destroy 3 years after close of reporting year.

NEW

GRS 20.2

2 Field Assistance Contact Recording System (FACR) is an automated system that records the audio portion of a customer contact and synchronizes it with electronic information related to the customer

Disposition: TEMPORARY. Delete/Destroy 3 years after close of reporting year.

C. Outputs:

Reports generated for planning, training and to track employee performance

Disposition: TEMPORARY. Delete/Destroy when superseded or no longer needed.

D. System Documentation:

Owners Manual, User Manual, Data Dictionary, Software Design Description, Software Requirements, et al

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

GKS 205

exception to GKS 20.11

**RECOMMENDATION TO THE ARCHIVIST ON RECORDS
DISPOSITION REQUEST**

Job No N1-58-10-16
Item Count: 3

SUMMARY

The Department of the Treasury, Internal Revenue Service requests disposition authority for the Field Assistance Support Systems

The Field Assistance Support Systems are used to track employee work, productivity, and effectiveness. This is done through a combination of data entry fields and recorded calls. Fielded data are used by managers to track employee workload and phone calls are recorded for quality control purposes. These records do not document significant actions of Federal officials since the files are strictly used for administrative purposes and do not document substantive interactions with taxpayers or their accounts.

RECOMMENDATION

- 1 APPROVED FOR DISPOSAL The records described under all items of the schedule, except those that may be listed in blocks 2, 3, and 4 of this section, are disposable because they do not, or will not after the lapse of the period specified, have sufficient administrative, legal, research or other value to warrant their continued preservation by the Government
- 2 APPROVED FOR PERMANENT RETENTION The records described under the following item or items have been appraised by the National Archives and Records Administration (NARA) and are determined to have sufficient historical or other value to warrant their continued preservation by the United States Government. The agency will transfer these records to the National Archives as specified
- 3 DISPOSITION NOT APPROVED The records described under the following item or items are not approved for disposition
- 4 WITHDRAWN The records described under the following item or items have been withdrawn at the request of the agency and/or NARA

FEDERAL REGISTER NOTICE

Not required

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SIGNATURES	TITLE	SIGNATURE	DATE
Appraisal <i>JW 6/15/11</i>	Appraiser	<i>Amy Charles</i>	<i>2011/4/2011</i>
<i>mmh 6/16/11</i>	ACNR	<i>Laurence v. Brown</i>	<i>6-17-2011</i>
<i>for</i>	ACN	<i>Julie Reaves</i>	<i>6-17-2011</i>
CONCURRENCES			