**REQUEST FOR RECORDS DISPOSITION AUTHORITY**  
*(See Instructions on reverse)*

<table>
<thead>
<tr>
<th>TO</th>
<th>DATE RECEIVED</th>
<th>REASON FOR RECORDS DISPOSITION AUTHORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NWML) 8601 ADELPHI ROAD, COLLEGE PARK, MD 20740-6001</td>
<td>4/16/72</td>
<td>N1-58-12-1</td>
</tr>
</tbody>
</table>

**MAJOR SUBDIVISION**  
Internal Revenue Service (IRS)

**MINOR SUBDIVISION**  
TE/GE Business Systems Planning

**NAME OF PERSON WITH WHOM TO CONFER**  
Stephanie Welch  
(703)565-3120  
Sharon Lasley  
(513) 263-3961

**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 page(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, has been requested.

**DATE**  
4/11/72

**SIGNATURE OF AGENCY REPRESENTATIVE**  
Daniel W. Bennett

**DESCRIPTION OF ITEM OF PROPOSED DISPOSITION**

1.15.24 Records Control Schedule for Tax Exempt and Government Entities

**Updates:**
Add new item 94, Exempt Organization Entity System (EOE)

Add new:
A. Inputs  
B. System Data  
C. Outputs  
D. System Documentation
Background
The EOE system is used to track and remind Exempt Organizations (EO) with a Group Ruling when their Supplemental Group Ruling Information (SGRI) subordinate listing is due. A monthly extract creates a listing for those Group Ruling EO’s whose tax returns will become due six months later. The system sends these organizations a series of letters identifying information that is required from them and when it is needed. EOE tracks the dates the letters and any subsequent follow-ups were sent and the date the response (SGRI) was received.

A. Inputs
Information is input into the system electronically from the BMF and also manually via EOE users.

Disposition: TEMPORARY. Delete/Destroy when necessary data has been incorporated into a master file.

B. System Data
Information contained in the system consists of names, Employer Identification Number (EIN), addresses and current SGRI letter issuance and response dates for parent organizations granted group exemption.

Disposition: TEMPORARY.

1. Closed Cases – Cut off when case is closed. Delete/Destroy 30 days after cut off.

2. Open Cases over 180 days old – transfer to history table. Delete/Destroy 1 year after transfer.

C. Outputs
Ad hoc reports

Disposition: TEMPORARY. Delete/Destroy when no longer needed for administrative, legal, audit or other operational purposes.

D. System Documentation:

Disposition: TEMPORARY. Delete/Destroy when superseded or 5 years after the system is
**REQUEST FOR RECORDS DISPOSITION AUTHORITY**

*(See Instructions on reverse)*

**JOB NUMBER**

N1-58-12-

*terminated, whichever is sooner.*