

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 N1-58-12-16	
1 FROM (Agency or establishment) Department of the Treasury		DATE RECEIVED 5/21/12	
2 MAJOR SUBDIVISION Internal Revenue Service (IRS)		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request, including amendments, is approved except for items that may be marked "disposition not approval" or "withdrawn" in column 10	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			
4 NAME OF PERSON WITH WHOM TO CONFER Tracee Taylor (Records Office) Ken Baker (EQRS/NQRS Support Team)		5 TELEPHONE 202-435-6308 510-637-2166	DATE 27 NOV 12
6 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> 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, <input checked="" type="checkbox"/> is not required, <input type="checkbox"/> is attached, or <input type="checkbox"/> has been requested			
DATE 5/16/2012	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7 ITEM NO	8 DESCRIPTION OF ITEM OF PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	<p>Updates to the following two electronic system schedules:</p> <p>RCS 31 for Customer Service Item 10(2) Embedded Quality Review System (EQRS)</p> <p>RCS 21 for Strategic Planning Item 17 National Quality Review System (NQRS)</p> <p>See attached.</p>	<p>N1-58-06-8</p> <p>N1-58-06-8</p>	

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

DO NOT WRITE IN THESE SPACES
NEVER BLANK (NARA use only)

JOB NUMBER

N1-58-12-

RCS 31, Item 10(2)

Embedded Quality Review System (EQRS).

The EQRS is used by managers to capture evaluative data obtained from monitoring taxpayer phone calls, reviewing paper cases, and face-to-face contacts. Reports can be generated for planning and training purposes and also for evaluative purposes. Managers use the system to track employee performance and training needs. This component is scheduled as an item in Records Control Schedule 31 for Customer Service.

a. Inputs:

Includes all source documentation (Data Collection Instruments, transcripts, and/or notes, etc.) relating to reviews of contact performance by employees which is used to input data into EQRS.

Delete/Destroy 3 years after close of reporting year

b. Outputs:

1) Reports printed from EQRS

~~Destroy when superseded or no longer needed~~

2) Employee Specific Evaluative Data. Following feedback meeting(s) transfer to Supervisor's Employee Performance File and **destroy** all other non-record copies. Schedule with RCS 38 (1.15.38) Item 18

REVIEW annually

DESTROY superseded or obsolete documents.

DESTROY file relating to an employee within 1 year after separation or transfer.

c. EQRS Master Data Files:

One database record created for each managerial review

Delete/Destroy 5 years after close of reporting year.

d. System Documentation:

Codebooks, record layout, data dictionary, User Guide, Master Attribute Job Aids and other relevant documentation.

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

No change.

No change.

GRS 20.16

No change.

Update to description, 2-year increase in retention.

Update to disposition instructions.

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

DO NOT WRITE IN THESE SPACES (NARA use only)

JOB NUMBER

N1-58-12-

RCS 21, 2,
item 17

National Quality Review System (NQRS).

The NQRS is used by independent quality reviewers to capture non-evaluative national and local product review data obtained from monitoring taxpayer phone calls, reviewing paper cases, and face-to-face contacts. Reports can be generated for planning and tracking purposes. Management uses the system to track organizational performance against official business performance measures, and to identify opportunities for improvement. This component is scheduled as an item Records Control Schedule 21 for Strategic Planning.

~~a. Inputs:~~

~~Includes all source documentation (Data Collection Instruments, transcripts, and/or notes, etc.) relating to non-evaluative national and local product reviews.~~

~~Delete/Destroy after data input has been validated.~~

~~b. Outputs:~~

~~Various printed reports.~~

~~Destroy when superseded or no longer needed.~~

c. NQRS Master Data Files:

One database record created for each product review.

Delete/Destroy 7 years after close of reporting year.

d. System Documentation

Codebooks, record layout, data dictionary, User Guide, Master Attribute Job Aids and other relevant documentation.

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

~~No change.~~

GRS 20.2

~~Deletion of old sub-items b2 and b3.~~

GRS 20.16

Update to description, 1-year increase in retention.

Update to disposition instructions.