

REQUEST FOR RECORDS DISPOSITION AUTHORITY <i>(See Instructions on reverse)</i>		LEAVE BLANK (NARA use only)	
TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NWML) 8601 ADELPHI ROAD, COLLEGE PARK, MD 20740-6001		JOB NUMBER NI-058-09-1	
1 FROM (Agency or establishment) Department of Treasury		DATE RECEIVED 12/17/08	
2 MAJOR SUBDIVISION Internal Revenue Service (IRS)		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request, including amendments, is approved except for items that may be marked "disposition not approval" or "withdrawn" in column 10	
3 MINOR SUBDIVISION Taxpayer Advocate Service & Wage and Investment			
4 NAME OF PERSON WITH WHOM TO CONFER Daniel W Bennett, IRS Records Officer Annette Lloyd, TAS HQ Liaison for W&I	5 TELEPHONE (202) 283-9359 (859) 669-5599	DATE 5/4/09	ARCHIVIST OF THE UNITED STATES <i>Adrienne C. Thomas</i>
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 checked="" type="checkbox"/> is not required, <input type="checkbox"/> is attached, or <input type="checkbox"/> has been requested			
DATE December 10, 2008	SIGNATURE OF AGENCY REPRESENTATIVE <i>[Signature]</i> Daniel W Bennett IRS Records Officer		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7 ITEM NO	8 DESCRIPTION OF ITEM OF PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	Update to IRM 1.15.9 RCS/ 9 for Taxpayer Advocate Service Adds new Item 12 Internal Revenue Form 12412 Operations Assistance Request (OAR) Update to IRM 1.15.29 RCS/ 29 [Old RCS22, previously 206] for Submissions Processing Campus Records Adds new Item 110 Internal Revenue Form 12412 Operations Assistance Request (OAR) <i>See the attached.</i>		

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DATE _____
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The records covered by this schedule are created and/or accumulated in the various offices of the Taxpayer Advocate Service Business Unit and Wage and Investment, Submissions Processing Campuses, formerly Service Centers

RCS 9
Item 12

1.15.9

and

RCS 29
Item 110

1.15.29

Internal Revenue Form 12412 Operations Assistance Request (OAR)

The Taxpayer Advocate Service (TAS) uses the Operation Assistance Request (OAR) process to refer cases when TAS lacks either the statutory or delegated authority to resolve a taxpayer's problem. TAS utilizes IR Form 12412, *Operations Assistance Request (OAR)* to initiate the OAR process. In cases requiring an OAR, TAS completes Form 12412 and forwards the case to the Operating Division Liaison with an attached IR Form 3210 Transmittal. The Operating Division Liaison reviews the case, assigns it to the appropriate area, and then monitors the case through its conclusion. Every effort is made to expedite completion of OAR cases. Timeframes for the assigned area to complete the case are indicated on IR Form 12412. If resolution of a taxpayer's case cannot be completed within the requested timeframe or by a negotiated extension date, the employee immediately notifies his or her manager. The manager/employee then works with the TAS contact listed on the IR Form 12412 to arrive at an agreed upon timeframe for follow-up based on the facts and circumstances of the particular case. The manager/employee assigned the case discusses the findings and recommendations on the final disposition of the case with the appropriate TAS contact. The TAS contact is responsible for "communicating the final decision on the case to the taxpayer".

Forms are created and are maintained at each Submission Processing Campus (Service Center) and may be duplicated as tracking records in various TAS Offices

Description:

The Taxpayer Advocate Service (TAS) uses the Operation Assistance Request (OAR) process to refer cases to Submissions Processing functions when TAS lacks either the statutory or delegated authority to resolve a taxpayer's problem. TAS utilizes IR Form 12412, *Operations Assistance Request (OAR)* to initiate the OAR process.

TEMPORARY

Cut-off at end of processing year, DESTROY 1 year after processing year.

NEW