

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

TO: **GENERAL SERVICES ADMINISTRATION,
NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON, DC 20408**

1. FROM (AGENCY OR ESTABLISHMENT)

Department of the Treasury

2. MAJOR SUBDIVISION

Office of the Secretary

3. MINOR SUBDIVISION

Office of Tax Analysis

4. NAME OF PERSON WITH WHOM TO CONFER

Jack Best

Roy A. Wyscarver

5. TEL. EXT.

566-2010

566-5085

LEAVE BLANK

JOB NO

NCI-56-79-7

DATE RECEIVED **24 APR 1979**

NOTIFICATION TO AGENCY

In accordance with the provisions of 44 U.S.C. 3303a the disposal request, including amendments, is approved except for items that may be stamped "disposal not approved" or "withdrawn" in column 10.

5-31-79 *James B. Rhoads*
Date Archivist of the United States

6. CERTIFICATE OF AGENCY REPRESENTATIVE:

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposal of the agency's records; that the records proposed for disposal in this Request of 2 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified.

☐ **A Request for immediate disposal.**

☒ **B Request for disposal after a specified period of time or request for permanent retention.**

C. DATE <i>4-20-79</i>	D. SIGNATURE OF AGENCY REPRESENTATIVE <i>Sarah J. Allen</i>	E. TITLE Chief, Records Management Branch Office of Assistant Director (Paperwork Mgmt) Office of Administrative Programs
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7. ITEM NO.	8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9. SAMPLE OR JOB NO.	10. ACTION TAKEN
1.	<p><u>Individual Income Tax Model Control Stream</u></p> <p>Computer printouts of control stream instructions used to manipulate individual income tax model and data sample. Each set of instructions, or run, contains the inputs which simulate various tax policy programs and performs tax analysis.</p> <p>DISPOSITION: Disposable under GRS 20, I, 11. Cut off files annually, destroy when four years old.</p>	NCI-56-78-10 ITEM 1	
2.	<p><u>Individual Income Tax Model Data Sample</u></p> <p>Each data set consists of a three-part Statistics of Income subsample and a three-part Statistics of Income-Survey of Income and Education subsample. The SOI subsample of 50,000 records is drawn from a base year (1970, 1972, 1973, and subsequent odd years) SOI sample of individual tax returns (a). The Office of Tax Analysis adds correlated social security information, edits and corrects all records, and usually imputes itemized deductions for standard deductions. The base year subsample is extrapolated to simulate the population, economy, and personal income levels of the second even year (b) and the following odd year (c). For example, the 1973 SOI,</p>	NCI-56-78-10 ITEM 2	

*sent to Agency
NMF, NW R, NWB*

*6-4-79
MPS*

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	<p>received in 1975 from IRS, is extrapolated for 1976 and 1977. The extrapolated data samples can simulate the effect of proposed tax code revisions and perform various tax analysis.</p> <p>The Statistics of Income-Survey of Income and Education match file utilizes approximately ten percent of the data elements in the SIE. This SIE subsample is merged with the base year SOI subsample to create the SOI-SIE match file (d). The base year subsample is extrapolated to simulate the population, economy, and personal income levels of the second even year (e) and the following odd year (f) as indicated above.</p> <p>ACCUMULATION: 24 reels plus supporting documentation.</p> <p>ANTICIPATED ANNUAL VOLUME: 3 reels plus supporting documentation.</p> <p>DISPOSITION: (a) Base Year SOI Subsample: Permanent. Transfer the data and supporting documentation to the Machine Readable Archives Division, National Archives and Records Service in February of the third year following the year of creation. For example, the 1977 Base Year SOI would be transferred in February 1980.</p> <p>(b,c) Extrapolated SOI Subsamples: Disposable. Transfer the data and supporting documentation to the Center for Machine-Readable Records, Machine Readable Archives Division, National Archives and Records Service, in June of the third and fourth year following the year of creation. Review every five years. Destroy when reference activity ceases.</p> <p>(d) Base Year SOI-SIE-CPS Match Subsample: Permanent. Transfer the data and supporting documentation to the Machine Readable Archives Division, National Archives and Records Service, in April of the third year following the year of creation.</p>		

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	<p>(e,f) Extrapolated SOI-SIE-CPS Match Subsamples: Disposable. Transfer the data and supporting documentation to the Center for Machine Readable Records, Machine Readable Archives Division, National Archives and Records Service, in June of the third and fourth year following the year of creation. Review every five years. Destroy when refer- ence activity ceases.</p> <p>Note: This proposal will rescind Job # NC 1 56-78-10.</p>		