

NOTICE - SOME ITEMS SUPERSEDED OR OBSOLETE

Schedule Number: N1-058-10-008

Some items in this schedule are either obsolete or have been superseded by new NARA approved records schedules. This information is accurate as of: 2/27/2025

ACTIVE ITEMS

These items, unless subsequently superseded, may be used by the agency to disposition records. It is the responsibility of the user to verify the items are still active.

Item 2, 6, 8, 17, 18, 19, 21, 22, 23, 24, 27

SUPERSEDED AND OBSOLETE ITEMS

The remaining items on this schedule may no longer be used to disposition records. They are superseded, obsolete, filing instructions, non-records, or were lined off and not approved at the time of scheduling. References to more recent schedules are provided below as a courtesy. Some items listed here may have been previously annotated on the schedule itself.





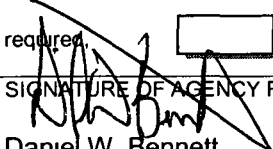
Item 4 superseded by DAA-GRS-2016-0016-0001 (GRS 5.1, item 010)

Item 10 superseded by DAA-GRS-2022-0009-0001 (GRS 5.2, item 010)

Items 20 superseded by DAA-GRS-2013-0008-0001 (GRS 1.2, item 020) and DAA-GRS-2013-0008-0006 (GRS 1.2, item 021)

Item 25 superseded by DAA-GRS-2017-0002-0001 (GRS 6.5, item 010)

NOTICE - SOME ITEMS SUPERSEDED OR OBSOLETE

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 N1-058-10-8	
1 FROM (Agency or establishment) Department of the Treasury		DATE RECEIVED 10/1/09	
2 MAJOR SUBDIVISION Internal Revenue Service		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request, including amendments, is approved except for items that may be marked "disposition not approval" or "withdrawn" in column 10	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 National Taxpayer Advocate			
4 NAME OF PERSON WITH WHOM TO CONFER Tracee Taylor (Records) Sandra Ramirez (Low Income Taxpayer Clinic, LITC) Alice Ho (TAS Quality Review Database) Dianne Henderson (TAS-all other records)		5 TELEPHONE 202-435-6308 904-665-1169 510-637-3010 251-341-5991	DATE 10/1/09
		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>16</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,  is not required,  is attached, or  has been requested			
DATE 9/28/2009		SIGNATURE OF AGENCY REPRESENTATIVE  Daniel W. Bennett	
		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)
	RCS 1.15.9 Records Control Schedule for Taxpayer Advocate This schedule seeks disposition authority approval of new Taxpayer Advocate items, as well as updates to items previously approved by NARA This schedule includes one electronic system, the Taxpayer Advocate Service Quality Review Database (TAS QRDB), to be published as Item 97 in RCS 1 15 9 * RCS 1.15.35 Tax Administration Electronic Systems Add pointer to Item 97 in RCS 1 15 9 RCS 1 15 35 is a cross-walk of electronic systems to official IRS Records Control Schedules. (see attached)		

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IRM 1.15.9, Records Control Schedule for Taxpayer Advocate**General Administrative Records**

1

1. Administrative Management and Organization Records.

NEW

a Records whether studies, analyses or correspondence, which established the policies, practices and programs for the management of the Taxpayer Advocate Service organization. Included are organizational changes, functional realignments and responsibilities, and long and short range planning documents

PERMANENT.

Cut off correspondence annually, studies and case files upon completion of study or at appropriate phase

Retire to Records Center 5 years after cutoff, or when no longer needed

Transfer to NARA 10 years after cutoff

WITHDRAWN

WITHDRAWN

b Records copies that document the history of the TAS organization

Correspondence and files of this type documentation may include analyses, coordinations, approvals and disapprovals, recommendations, plans and implementing instructions for the plans, and any background materials, which contribute to an understanding or provide an explanation for complete documents

PERMANENT.

Cut off correspondence annually, and studies and case files upon completion of study or at appropriate phase

Retire to Records Center 5 years after cutoff, or when no longer needed

Transfer to NARA 10 years after cutoff

WITHDRAWN

WITHDRAWN

c Reference or extra copies of records listed in "a" and "b" above

Destroy when 2 years old

2

2. Delegations of Authority Files.

NEW

Record copies documenting the delegations of authority to an individual or office in accordance with prescribed regulations and not included in the Internal Management Document System (These records are of a limited nature

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as opposed to delegation of authority records on a continuing basis, which are a part of the Internal Management Document System)

Destroy 1 year after close of the fiscal year in which delegation of authority was terminated

3. Equal Employment Opportunity Records.

a Copies of Complaint Case Files Duplicate case files or documents pertaining to case files retained in Official Discrimination Complaint Case Files

Destroy 1 year after resolution of case

b Preliminary and Background Files

1 Background records not filed in the Official Discrimination Complaint Case Files

Destroy 2 years after final resolution of case

2 Records documenting complaints that do not develop into Official Discrimination Complaint Cases

(Note: Refer to General Records Schedule 1, Item 25, for disposal instructions for Official Discrimination Complaint Case Files, Compliance Records, Employee Housing Requests, Employment Statistics Files, EEO General Files, and EEO Affirmative Action Plan)

Destroy 2 years after final resolution of case

4

4. General Administrative and Housekeeping Correspondence.

Routine correspondence, transmittals, facsimiles, and requisitions that relate to administrative, housekeeping and facilities management, and are not procedural in nature

Destroy when 2 years old

5

5. Incentive Awards Suggestion File.

Closed file of employee suggestions, evaluations, replies to the suggesters, and Incentive Awards Coordinators

Destroy when 3 years old

NEW

GRS 1.25 b,
c1, & c2

NEW

NEW

GRS 113

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6	6. Internal Management Issuances. Clearance documents (reference copies) with the supporting case file prepared and issued by TAS's staff Includes Internal Revenue Manual (IRM) issuances, transmittals, etc Note The Office of Servicewide Policy, Directives, and Electronic Research maintains the historical copies of the IRM issuances Cut off file when inactive or obsolete Retire to Records Center 2 years after cutoff Destroy 10 years after cutoff	NEW	
7	 7. Labor Management Relations Records. a Labor Management Relations General and Case Files These records include Letters of Understanding, Memoranda of Understanding, and Agreements negotiated with the National Treasury Employees Union, either nationally or locally They pertain to Taxpayer Advocate Service operations and changes, which impact upon bargaining unit employees 1 Office negotiating agreement Destroy 5 years after expiration of agreement 2 Other offices Destroy when superseded or obsolete b Labor Arbitration General and Case Files Correspondence, forms, and background papers relating to labor arbitration cases Destroy 5 years after final resolution of case 	NEW GRS 128 a1, 2, 1b	
8	8. Office Service Records. Records pertaining to internal service operations, acquisitions, allocations, and administration of space, building maintenance, safety and protection, printing and copying, building passes, telephone services, equipment and its inventory, furniture and equipment repairs and services, replacement and repairs of utilities Also includes studies and reports of supply and equipment needs Destroy when 2 years old	NEW	

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9	<p>9. Special Project or Study Files.</p> <p>Records relating to a specific project or study from inception to completion. Records include correspondence with Congress, commissions mandated by Congress, other Federal agencies, state and local governments, questionnaires, internal memorandums, final reports, surveys, test results, publications, and implementation plans</p> <p>PERMANENT. Retire to Records Center when 5 years old Transfer to NARA in 5-year blocks when 10 years old</p>	NEW	
10 ✓	<p>10. Transmittal Records.</p> <p>Requests for information and copies of replies which involve no administrative action, policy decision, special processing or research, requests for and transmittals of publications and other reference material, acknowledgements and transmittals of inquiries and requests transferred to another office for reply</p> <p>Destroy when 3 months old</p> <p>➤ Items 11-31 are reserved for future records series that are required</p> <p><u>National Taxpayer Advocate Office's Records</u></p>	WITHDRAWN	WITHDRAWN
11	<p>32. Annual Reports to Congress.</p> <p>These reports are mandated by Congress and IRC §7803(c)(2)(B)(i) and (ii). One report, which is due no later than June 30 each year, provides Congress with substantive analysis and statistical information of the objectives of the Office of the Taxpayer Advocate for the fiscal year. The second report, which is due each year by December 31, details the activities of the Office of the Taxpayer Advocate during the fiscal year. The report contains full and substantive analysis, as well as statistical information. It also contains TAS' initiatives, information on Taxpayer Assistance Orders under IRC §7811, a summary of at least 20 of the most serious problems encountered by taxpayers, a summary of the 10 most litigated issues for each category of taxpayers, including recommendations for mitigating such disputes, and recommendations for administrative and legislative action that may be appropriate to resolve problems encountered by taxpayers</p>	Supersedes N1-58-95-3, Item 9	

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	<p>a Record copy of Final Reports</p> <p>PERMANENT. Cut off at the end of the fiscal year Retire to Records Center 5 years after cutoff Transfer to NARA 10 years after cutoff, or when no longer needed for administrative, audit, legal, or other operational purposes, whichever is sooner</p> <p>b Working Papers</p> <p>Include all related documentation, background documentation, correspondence, contacts, IRM citations, data, test results and formulas used in preparing and pertaining to issues in the Final Report.</p> <p>PERMANENT. Cut off at the end of the fiscal year Retire to Records Center 5 years after cutoff Transfer to NARA 10 years after cutoff, or when no longer needed for administrative, audit, legal, or other operational purposes, whichever is sooner</p>	WITHDRAWN	WITHDRAWN
12	<p>33. Calendars and Schedules.</p> <p>These records document daily activities of the National Taxpayer Advocate and the Deputy National Taxpayer Advocate. They are maintained electronically and in hard copy formats</p> <p>a Paper copies of calendars or schedules of the National Taxpayer Advocate and the Deputy National Taxpayer Advocate</p> <p>PERMANENT. Cut off at the end of the fiscal year Retire to Records Center 5 years after cutoff Transfer to NARA in 5-year blocks when 10 years old</p> <p>b Electronic versions of all calendars</p> <p>Delete after verification of printed copy</p>	NEW	WITHDRAWN
13	<p>34. Executive Conferences and Meetings.</p> <p>These conferences or meetings involve senior-level discussions on program, policy, planning, and tax administration issues</p> <p>a Agendas, issue or briefing papers, handouts, final reports, minutes, or equivalent documentation</p>	NEW	

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PERMANENT.**Cut off** at the end of the fiscal year**Retire** to Records Center 5 years after cutoff**Transfer** to NARA in 5-year blocks when 10 years old

b Logistical documentation generated in preparation for each conference, i.e. correspondence with hotels and participants, notification packages, etc.

Destroy when 2 years old

WITHDRAWN

35. Reading Files.

a Copies of correspondence signed by the National Taxpayer Advocate and Deputy National Taxpayer Advocate that contain taxpayer information

PERMANENT.**Cut off** at the end of the fiscal year**Retire** to Records Center 5 years after cutoff**Transfer** to NARA in 5-year blocks when 10 years old, with access restricted by Section 6103 of the Internal Revenue Code

b Copies of correspondence signed by the National Taxpayer Advocate and Deputy National Taxpayer Advocate that do not contain taxpayer information

WITHDRAWN

WITHDRAWN

PERMANENT.**Cut off** at the end of the fiscal year**Retire** to Records Center 5 years after cutoff**Transfer** to NARA in 5-year blocks when 10 years old

c Reading Files maintained by all other staff members of the National Taxpayer Advocate and Deputy National Taxpayer Advocate

WITHDRAWN

Cut off at the end of the fiscal year**Destroy** 2 years after cutoff

15

36. Speech Files.

Copies of speeches delivered by the National Taxpayer Advocate on major initiatives impacting taxpayers, taxpayer advocacy issues, policies, and programs related to the Taxpayer Advocate organization

a Record copy of all speeches delivered by the National Taxpayer Advocate

NEW

NEW

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PERMANENT.**Cut off** at the end of the fiscal year**Transfer** to NARA in 5-year blocks when 10 years old

b Working copies, drafts, background information

Destroy when no longer needed for administrative, legal, audit, or other operational purposes**37. Subject Files.**

These files consist of all records relating to a specific issue that requires the attention of the National Taxpayer Advocate and Deputy National Taxpayer Advocate. Records include correspondence with other Federal agencies, state and local governments, private companies, organizations, institutions, internal memoranda, staff and contractor studies, reports, and related records.

a Subject Files maintained by the National Taxpayer Advocate and Deputy National Taxpayer Advocate

1 Files maintained on program or policy issues that contain taxpayer information

PERMANENT.**Cut off** at the end of the fiscal year**Retire** to Record Center 2 years after cutoff**Transfer** to NARA in 5-year blocks when 10 years old, with access restricted by Section 6103 of the Internal Revenue Code

2 Files on program and policy issues that do not contain taxpayer information

PERMANENT.**Cut off** at the end of the fiscal year**Retire** to Records Center 2 years after cutoff**Transfer** to NARA in 5-year blocks when 10 years old

3 Files containing records on routine administrative issues

Cut off at the end of the fiscal year**Destroy** 2 years after cutoff

b Subject Files maintained by the Immediate Staff of the National Taxpayer Advocate and Deputy National Taxpayer Advocate

1 Files containing records on program and policy issues that contain taxpayer information

WITHDRAWN

NEW

WITHDRAWN

WITHDRAWN

WITHDRAWN

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17	<p>PERMANENT. Cut off at the end of the fiscal year Retire to Records Center 2 years after cutoff Transfer to NARA in 5-year blocks when 10 years old, with access restricted by Section 6103 of the Internal Revenue Code</p> <p>2 Files on program and policy issues that do not contain taxpayer information</p> <p>PERMANENT. Cut off at the end of the fiscal year Retire to Records Center 2 years after cutoff Transfer to NARA in 5-year blocks when 10 years old</p> <p>3 Files containing records on routine administrative issues</p> <p>Cut off at the end of the fiscal year Destroy 2 years after cutoff</p> <p>c Subject Files maintained by all other staff members of the National Taxpayer Advocate and the Deputy National Taxpayer Advocate</p> <p>Cut off at the end of fiscal year Destroy 2 years after cutoff</p>	NEW	WITHDRAWN
	<p>38. Trip Files.</p> <p>These records include correspondence to the National Taxpayer Advocate and the Deputy National Taxpayer Advocate concerning field visits or other trips of official business, itineraries, pertinent biographic information, general logistic information, and thank-you letters written after completion of the trip</p> <p>Cut off at the end of the fiscal year Destroy 5 years after cutoff</p> <p>➤ Items 39-59 are reserved for future records series that are required</p> <p><u>Case Files, Program Records and Reports</u></p>		WITHDRAWN
18	<p>60. Form 911 – Application for Taxpayer Assistance Order (ATAO, replaces Form 5543).</p> <p>Form 911 is completed by or on behalf of taxpayers who are facing a hardship that results from the administration of IRS's tax laws</p>	Supersedes NC1-58-81-12, Item 1(1)	WITHDRAWN

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19	<p>Cut off at the end of the fiscal year in which the case was closed Retire to Records Center 1 year after cutoff Destroy 2 years after cutoff</p> <p>61. Correspondence Case Files.</p> <p>Case files of responses to correspondence that are received by Headquarters Taxpayer Advocate Service</p> <p><i>All taxpayer-related correspondence is sent to the appropriate Local Taxpayer Advocate (LTA) for action, including input to TAMIS, as applicable (N1-58-09-81)</i></p> <p>Cut off at the end of the fiscal year in which the case was closed Destroy 2 years after cutoff</p>	NEW	
20	<p>62. Low Income Taxpayer Clinic (LITC) Grant Files.</p> <p>Background:</p> <p><i>The Taxpayer Advocate Service (TAS) is an independent organization within the IRS whose employees assist taxpayers who are experiencing economic harm, who are seeking help in resolving tax problems that have not been resolved through normal channels, or who believe that an IRS system or procedure is not working as it should. The National Taxpayer Advocate, currently Nina Olson, heads the program. Each state and campus has at least one local Taxpayer Advocate, who is independent of the local IRS office and reports directly to the National Taxpayer Advocate. The goals of TAS are to protect individual and business taxpayer rights and to reduce taxpayer burden. This is accomplished in two ways:</i></p> <ul style="list-style-type: none"> <i>Ensuring that taxpayer problems which have not been resolved through normal channels, are promptly and fairly handled,</i> <i>Identifying issues that increase burden or create problems for taxpayers. Bringing those issues to the attention of IRS management and making legislative proposals where necessary.</i> <p><i>The Taxpayer Advocate Service's Low Income Taxpayer Clinic (LITC) grant program is a result of the IRS Restructuring and Reform Act of 1998. It is designed to help organizations provide free or nominal cost legal assistance to low income taxpayers in resolving tax disputes with the IRS and inform taxpayers for whom English is a second language about their taxpayer rights and responsibilities. LITCs are independent from the IRS.</i></p>	NEW	

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Most LITCs can provide representation before the IRS or in court on audits, tax collection disputes and other issues for free or for a nominal fee

Under the LTC grant program, the IRS awards matching grants of up to \$100,000 per year to qualifying organizations to develop, expand or maintain low-income taxpayer clinics. The LTC Program Office may award grants to qualifying organizations to fund one-year, two-year or three-year project periods. The program is in its eleventh year and continues to expand.

Decisions made by the IRS whether to make or not make an award are not subject to appeal.

Description:

Records include an application package for the Low Income Tax Clinic (LITC) grant program of clinics receiving grant awards for a specific calendar year. Applications are reviewed and a determination made as to whether to award or not award the applicant. The LTC Program Office may award grants to qualifying organizations to fund one-year, two-year or three-year project periods. Non-awarded files consist of the application and review documentation. Awarded files include the application and review documentation along with monitoring and reporting information. Each application package may include, but is not limited to, the following items:

- IR Form 13424 *IRS Low Income Taxpayer Clinic Application Information Sheet*
- SF 424 *Application for Federal Assistance*
- SF 424A *Budget Information – Non-Construction Programs*
- SF LLL *Disclosure of Lobbying Activities*
- Letter of academic accreditation for affiliated college, university or other institution of higher learning
- Tax Information Authorization Form
- Background/Civil Rights/Program Narratives
- Budget/Financial Plan
- Interim/Annual Reports
- IRS Determination Letter
- Supporting Documentation
- CD of all application package documents

a Rejected grant applications

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21	<p>Cut off at end of calendar year in which application is rejected Destroy 3 year after cutoff</p> <p>b Accepted grant applications</p> <p>Cut off at end of calendar year in which grant program period ends Retire to Records Center 1 year after cut off Destroy 6 years, 3 months after cutoff</p> <p>63. National Taxpayer Advocate Case Files (Blue Case File, Document Number 11469).</p> <p>Taxpayer case files that are developed in response to correspondence, fax, and e-mail requests to the attention of the National Taxpayer Advocate</p> <p><i>Case-related matter is sent to the appropriate Local Taxpayer Advocate (LTA) for action, including input to TAMIS (N1-058-09-81)</i></p> <p>Cut off at the end of the fiscal year in which the case was closed Retire to Records Center 2 years after cutoff Destroy 5 years after cutoff</p>	NEW	
	<p>64. Senate Finance Committee Records and Case Files.</p> <p>Records include closed case files that were identified during Senate Finance Committee Hearings and required further contact with the taxpayers</p> <p><i>Case-related matter is sent to the appropriate Local Taxpayer Advocate (LTA) for action, including input to TAMIS (N1-58-09-81) or e-Trak (for Legislative Affairs inquiries, to be scheduled)</i></p> <p>Cut off at the end of the fiscal year in which the case was closed Retire to Records Center 2 years after cutoff Destroy 5 years after cutoff</p>		
23	<p>65. Sensitive Case Files.</p> <p>Cases initially addressed to TIGTA, and then forwarded to the IRS Commissioner's Complaint Processing and Analysis Group (CCPAG), and Employee Conduct and Compliance Office (ECCO) for an internal investigation</p> <p><i>Case-related matter is sent to Area office for investigation</i></p>	NEW	

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	<p>and resolution, and input to e-Trak (as applicable, to be scheduled)</p> <p>Cut off at end of the Fiscal Year in which case is closed Delete/Destroy 3 years after cutoff</p>		
24	<p>66. Small Business Regulatory Enforcement Fairness Act (SBREFA) Cases.</p> <p>Taxpayer cases or files developed in response to correspondence, fax, and e-mail requests to the attention of the National Taxpayer Advocate</p> <p><i>Case-related matter is sent to the appropriate Local Taxpayer Advocate (LTA) for action, including input to TAMIS (N1-58-09-81)</i></p> <p>Cut off at the end of the fiscal year in which the case was closed Retire to Records Center 2 years after cutoff Destroy 5 years after cutoff</p>	NEW	
25	<p>67. Customer Satisfaction Survey Reports (January 2001 to Present).</p> <p>a Electronic database</p> <p>Cut off at the end of the fiscal year in which the report was released Delete 3 years after cutoff</p> <p>b Quarterly and annual survey reports (paper and electronic formats)</p> <p>Cut off at the end of the fiscal year in which the report was released Destroy 3 years after cutoff</p>	NEW	
26	<p>68. National and Area Advocacy Project Reports (1982 to Present).</p> <p>These reports are developed and written by advocacy analysts, Local Taxpayer Advocates, and Area Taxpayer Advocates. They contain research, data, histories contacts, formulas, citations, documentation, and test results. TAS refers to these reports to make recommendations for changing policies and procedures within the IRS that reduce taxpayer burden, protect taxpayer rights, and improve customer service</p> <p>a Record copy</p>	Supersedes N1-58-95-3, Item 8	

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	<p>PERMANENT. Cut off at the end of the fiscal year in which the report was prepared Retire to Records Center 5 years after cutoff Transfer to NARA 20 years after cutoff, or when no longer needed for administrative, audit, legal, or other operational purposes, whichever is sooner</p> <p>b Working papers</p> <p>Destroy when 5 years old, or when no longer needed for administrative, audit, legal or other operational purposes, whichever is sooner</p> <ul style="list-style-type: none"> ➤ Item 70 Quarterly Narrative Reports (Job No NC1-58-81-12, Item 1[4]) ➤ Item 71 Form 5391 (Job No NC1-58-81-12, Item 1[5]) ➤ Item 72 Statistical Reports (Job No NC1-58-81-12, Item 1[6]) ➤ Item 73 Form 12412 (Job No N1-58-09-1) ➤ Items 69, 74-93 are reserved for future records series that are required <p><u>Information Systems/Electronic Systems</u></p> <ul style="list-style-type: none"> ➤ Item 94 Taxpayer Advocate Management Information System (TAMIS) (Job No N1-58-09-81) ➤ Item 95 Systemic Advocacy Management system (SAMS) (Job No N1-58-08-3) ➤ Item 96 Taxpayer Advocate Service Customer Outreach System (TAS COS) (Job No N1-58-07-7) 		<p>WITHDRAWN</p> <p>WITHDRAWN</p>
27	<p>97. Taxpayer Advocate Service Quality Review Database (TAS QRDB)</p> <p>Background:</p> <p><i>The Taxpayer Advocate Service (TAS) uses balanced measures to assess program effectiveness and service delivery TAS measures quality, a business results measure, by reviewing a statistically valid sample of closed cases against prescribed quality standards The casework quality index is the result of the review of these standards TAS uses these results to identify and correct identified system or process problems, determine training needs, and identify best practices</i></p> <p><i>The QRDB</i></p>	NEW	

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TAS Quality Review Program (TARP) employees enter the results of each individual case review into the TAS QRDB, an Access database from which TAS generates management reports for all TAS offices nationwide. Review results are also extracted and forwarded to the IRS Business Performance Management System (BPMS) Project Office to load into the TAS quality model on the BPMS at the Detroit Data Center.

The Taxpayer Advocate office in each local office/campus, area office, operating division, and National Office has a copy of the QRDB that contains the review results (e.g., checksheet, comments, and closure/sample size information) for the particular office. The National Office's QRDB contains results from all the offices within the nation.

Description:

The Taxpayer Advocate Service Quality Review Database (TAS QRDB) is an Access database used exclusively to record, control, analyze and report on Taxpayer Advocate Service case quality.

~~a. Inputs:~~

~~Taxpayer Advocate Review Program (TARP) staff input results from reviews of closed case files into the QRDB.~~

~~**Destroy/Delete** upon capture and verification into the electronic system.~~

~~*Note: Closed case files are returned to the originating office after successful entry and validation.*~~

b. Quality Review Database (QRDB) Master Files:

Data files include basic case information, and a breakdown of timeliness, communication and accuracy data from all closed case reviews nationwide.

Cut off at the end of the fiscal year in which the case is closed.

Destroy/Delete 3 years after cutoff.

~~c. Outputs:~~

~~1 Quality rate reports which can be viewed on the desktop or printed as needed~~

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<p>Destroy/Delete when no longer needed for operational purposes.</p> <p>2. Business Performance Management System (BPMS) extracts which are forwarded electronically to the BPMS Program Office for loading into the TAS quality model on the BPMS at the Detroit Data Center</p> <p>Cut off at the end of the fiscal year in which the data is forwarded.</p> <p>Delete 3 years after cutoff</p> <p>d. System Documentation:</p> <p>QRDB documentation consists of a User/Administrator Guide</p> <p>Destroy/Delete when superseded or 5 years after the system is terminated, whichever is sooner</p>		GRS 20 5 GRS 20 5 exception to GRS 20.1/	

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NSN 7450-00-634-4064
 PREVIOUS EDITION NOT USABLE

STANDARD FORM 115 (REV. 3-91)
 Prescribed by NARA
 36 CFR 1228