

REQUEST FOR RECORDS DISPOSITION AUTHORITY

(See instructions on reverse)

LEAVE BLANK (NARA use only)

JOB NUMBER: *NI-058-97-3*

TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NIR)
WASHINGTON, DC 20408

DATE RECEIVED: *7/1/97*

1 FROM (Agency or establishment)
Department of the Treasury

NOTIFICATION TO AGENCY

2 MAJOR SUBDIVISION
Internal Revenue Service

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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10

3 MINOR SUBDIVISION
Communications Division

4 NAME OF PERSON WITH WHOM TO CONFER
Sandra J. Myers

5 TELEPHONE
535-3936

DATE
3-13-98

ARCHIVIST OF THE UNITED STATES

[Signature]

6 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, is not required, is attached, or has been requested.

DATE
6/30/97

SIGNATURE OF AGENCY REPRESENTATIVE
Sandra J. Myers Jr.
Bonnie x DeCaroline

TITLE **IRS Records Officer**

| 7 ITEM NO. | 8 DESCRIPTION OF ITEM AND PROPOSED DISPOSITION | 9 GRS OR SUPERSEDED JOB CITATION | 10 ACTION TAKEN (NARA USE ONLY) |
|------------------|---|--|---------------------------------------|
| | <p>Records Control Schedule 205 for Servicewide Communications</p> <p>The records covered by this schedule are created and/or accumulated by the Communications Division in the National Office and field offices. This division was formerly known as Public Affairs</p> <p>The Communications Division handles all media requests for tax information in the form of news releases, data books, and filing season information, etc</p> | | |

Revised 8/18/97

Records Control Schedule 205 for Servicewide Communications

| Item | Description of Records | Authorized Disposition |
|------|---|--|
| 1. | <p><u>IRS News Releases</u> (1990 to Present) sent to national or local media (Job No. N1-58-80-11). <i>Arranged chronologically.</i></p> <p>A. Record copy of all news releases issued by Headquarters.</p> <p style="padding-left: 40px;">(1) News releases created through 1996.</p> <p style="padding-left: 40px;">(2) Headquarters news releases created 1997 and beyond</p> <p>Current Volume 5 c f Annual Accumulation less than 5 c f</p> <p>B. Record copy of news releases issued by the Field.</p> <p style="padding-left: 40px;">(1) Field news releases created through 1996</p> <p style="padding-left: 40px;">(2) Field news releases 1997 and beyond.</p> | <p>PERMANENT. Upon approval of this schedule, transfer to NARA.</p> <p>PERMANENT. Cutoff at the end of the calendar year. Retire in 2-year blocks to the Washington National Records Center when the oldest record is 2 years old. Transfer to NARA in 4-year blocks when the newest record is 4 years old.</p> <p>PERMANENT. Upon approval of this schedule, transfer to NARA.</p> <p>PERMANENT. Cutoff at the end of the calendar year. Retire to the Federal Records Center in 5-year blocks when oldest record is 5 years old. Transfer to NARA in 5 year blocks when newest record is 10 years old.</p> |

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| Item No. | Description of Records | Authorized Disposition |
|----------|---|--|
| | C. Records determined during archival processing to lack sufficient archival value to warrant permanent retention by NARA. | Destroy immediately. |
| | D. All supporting documentation collected by Headquarters or the Field during the development of news releases. | Destroy when 2 years old. |
| 2. | IRS Newsletters. Organizational news of interest to IRS employees. (Job No. NC1-58-90-11). Arranged chronologically. | PERMANENT. Cutoff at the end of the calendar year. Retire in 2-year blocks to Federal Records Center when oldest record is 2 years old. Transfer to NARA in 4-year blocks when the newest record is 4 years old. |
| | A. Record copy of all newsletters issued by Headquarters. | |
| | Current volume 5 c f Annual accumulation less than 5 c f | |
| | B. Record copy of all newsletters issued by the Field. | PERMANENT. Cutoff at the end of the calendar year. Retire to the Federal Records Center in 5-year blocks when oldest record is 5 years old. Transfer to NARA in 5-year blocks when newest record in 10 years old. |
| | C. Records determined during archival processing to lack sufficient archival value to warrant permanent retention by NARA. | Destroy immediately. |

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|----------|---|---|
| | D. All supporting documentation collected by Headquarters or the Field during the development of newsletters. | Destroy when 2 years old. |
| 3. | Fact Sheets (1973-Present). Informational distributed internally by Headquarters to field Public Affairs Officers and externally to news media, regarding new, technical or revised administration policies and procedures. <i>Arranged chronologically.</i> | PERMANENT. Upon approval of this schedule, transfer to NARA. |
| | A Fact Sheets created through 1996. | PERMANENT. Cutoff at the end of the calendar year. Retire in 2-year blocks to the Federal Records Center when oldest record is 2 years old. Transfer to NARA in 4-year blocks when the newest record is 4 years old. |
| | B. Fact Sheets created in 1997 and beyond. | |
| | Current Volume less than 1 c f Annual Accumulation less than 1 c f | |
| 4. | Data Books (Publication 55B) (formerly known as the Commissioner's Annual Report). Fiscal year statistical tables, organizational information, and lists of IRS officials and offices (Job No. NC1-58-80-11/17A). <i>Arranged chronologically.</i> | |

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|---|--|--|
| A. Record Copy. | | PERMANENT. Transfer to NARA one copy of Data Book upon issuance. |
| B. Supporting documentation collected during the development of the Data Book. | | Destroy when 2 years old. |
| 5. | <u>Speech Files</u> (1987-present). Record copy of speeches which deal with administration issues, the overall planning and direction of the IRS, and specific policies and programs. <i>Arranged chronologically.</i> | |
| A. Record copy of speeches delivered by the Commissioner and Deputy Commissioner. | | |
| (1) Speeches 1987 through 1992. | | PERMANENT. Upon approval of this schedule, transfer to NARA. |
| (2) Speeches 1993 to present. (N1-058-96-4/9A) | | PERMANENT. Cutoff at the end of the calendar year. Retire to the Washington National Records Center when 5 years old. Transfer to NARA in 5-year blocks when 10 years old. |
| Volume: 1 c.f. Annual Accumulation: less than .5 c.f. | | |

| Item No. | Description of Records | Authorized Disposition |
|----------|--|--|
| | B. Record copy of speeches delivered by Regional Commissioners, District Directors, or Service Center Directors. | PERMANENT. Cutoff at the end of the calendar year. Retire to the Federal Records Center when 5 years old. Transfer to NARA in 5-year blocks when newest record is 10 years old. |
| | C. Records determined during archival processing to lack sufficient archival value to warrant permanent retention by NARA. | Destroy immediately. |
| | D Incoming requests, tracking documents, related correspondence, working copies, drafts, and background information collected during the development of all speeches. | Destroy when 2 years old or when no longer needed, whichever is sooner. |
| 6. | <u>Still Pictures</u> (1862 - Present). | |
| | A. Black-and-white and color prints. | |
| | (1) Black-and-white and color portrait prints of senior IRS officials including, but not limited to, the Commissioner, Deputy Commissioner, Chief Counsel, Assistant Commissioners, Regional Commissioners, District Directors, and Service Center Directors | |

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| Item No. | Description of Records | Authorized Disposition |
|-------------|---|---|
| | Current Volume ca 700 images or 3 c f Annual Accumulation less than 1 c f | |
| | (a) Prints through 1996. | PERMANENT. Upon approval of this schedule, transfer to NARA. |
| | (b) Prints 1997 and beyond | PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA in 5-year blocks when oldest print is 5 years old. |
| | (2) Black-and-white and color prints of important IRS events and functions that document the mission of the agency. They include, but are not limited to, swearing-in ceremonies, press conferences, executive conferences, speeches, visits of political and foreign officials, visits to field offices, facilities and resource development processes, and tax forms processing. | |
| | Current Volume ca 2,000 images. or 6 c f Annual Accumulation less than 1 c f | |
| | (a) Prints through 1996. | PERMANENT. Upon approval of this schedule, transfer to NARA. |
| | (b) Prints 1997 and beyond. | PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA in 5-year blocks when the oldest print is 5 years old. |

| Item No. | Description of Records | Authorized Disposition |
|-------------|--|--|
| | B. Black-and-white Negatives | |
| | (1) Black-and-white portrait negatives of senior IRS officials including, but not limited to, the Commissioner, Deputy Commissioner, Chief Counsel, Assistant Commissioners, Regional Commissioners, District Directors, and Service Center Directors | |
| | Current Volume ca 1,000 negatives or less than 1 c f Annual Accumulation less than 1 c f | |
| | (a) Negatives through 1996. | PERMANENT. Upon approval of this schedule, transfer to NARA. |
| | (b) Negatives 1997 and beyond. | PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA in 5-year blocks when the oldest negative is 5 years old. |
| | (2) Black-and-white negatives of important IRS events and functions that document the mission of the agency. They include, but are not limited to, swearing-in ceremonies, press conferences, executive conferences, speeches, visits of political and foreign officials, visits to field offices, facilities and resource development processes, and tax form processing. | |

| Item No. | Description of Records | Authorized Disposition |
|----------|--|--|
| | <p>Current Volume ca 4,000 negatives or l c f Annual Accumulation less than l c f</p> <p>(a) Black-and-white negatives through 1996.</p> <p>(b) Black-and-white negatives 1997 and beyond.</p> | <p>PERMANENT. Upon approval of this schedule, transfer to NARA.</p> <p>PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA in 5-year blocks when the oldest negative is 5 years old.</p> |
| | <p>C. Color Negatives.</p> <p>(1) Color portrait negatives of senior IRS officials, including, but not limited to, the Commissioner, Deputy Commissioner, Chief Counsel, Assistant Commissioners, Regional Commissioners, District Directors, and Service Center Directors.</p> <p>Current Volume ca 2,000 negatives or less than l c f Annual Accumulation less than l c f</p> <p>(a) Color negatives through 1996.</p> <p>(b) Color negatives 1997 and beyond.</p> | <p>PERMANENT. Upon approval of this schedule, transfer to NARA</p> <p>PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA in 5-year blocks when the oldest negative is 5 years old.</p> |

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|-------------|--|---|
| | <p>(2) Color negatives of important IRS events and functions that document the mission of the agency. They include, but are not limited to, swearing-in ceremonies, press conferences, executive conferences, speeches, visits of political and foreign officials, visits to field offices, facilities and resource development processes, and tax forms processing.</p> | |
| | <p>Current Volume ca 10,000 images or 1 c f Annual Accumulation less than 1 c f</p> | |
| | <p>(a) Color negatives through 1996</p> | <p>PERMANENT. Upon approval of this schedule, transfer to NARA.</p> |
| | <p>(b) Color negatives 1997 and beyond.</p> | <p>PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA in 5-year blocks when the oldest negative is 5 years old.</p> |
| | <p>D. Slides and Filmstrips.</p> | |
| | <p>(1) Portrait slides of senior IRS officials including, but not limited to, the Commissioner, Deputy Commissioner, Chief Counsel, Assistant Commissioners, Regional Commissioners, District Directors, Service Center Directors. Current Volume less than 1 c f Annual Accumulation less than 1 c f</p> | |

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| Item No. | Description of Records | Authorized Disposition |
|----------|---|---|
| | (a) Slides and filmstrips through 1996 | PERMANENT. Upon approval of this schedule, transfer to NARA. |
| | (b) Slides and filmstrips 1997 and beyond. | PERMANENT. Cutoff at the end of the calendar year Transfer to NARA in 5-year blocks when the oldest slide or filmstrip is 5 years old. |
| | (2) Slides and filmstrips and accompanying audio recordings and/or scripts of important IRS events and functions that document the mission of the agency. They include, but are not limited to, swearing-in ceremonies, press conferences, executive conferences, speeches, visits of political and foreign officials, visits to field offices, facilities and resource development processes, and tax forms processing | |
| | Current Volume ca 400 images or less than 1 c f Annual Accumulation less than 1 c f | |
| | (a) Slides and filmstrips through 1996. | PERMANENT. Upon approval of this schedule, transfer to NARA. |

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| | (b) Slides and filmstrips 1997 and beyond. | PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA in 5-year blocks when the oldest slide or filmstrip is 5 years old. |
| | E. Indexes, log books, and/or work orders for photo assignments that provide descriptive access to A, B, C, and/or D above. | PERMANENT. Transfer documentation with corresponding images listed in A, B, C, and/or D above. |
| | Current Volume less than 1 c f Annual Accumulation less than 1 c f | |
| | F. Prints, Negatives, Slides, and Filmstrips not covered in A, B, C, or D above including, but not limited to, black-and-white and color prints, negatives, slides, and filmstrips of lower-level IRS employees and routine award ceremonies, retirement ceremonies, social events, campaigns common to most Government agencies (e.g., CFC or Savings Bonds campaigns), and other routine activities. | Destroy when no longer needed. |
| 7. | Audiovisual Records (1993 to Present). A. Agency-sponsored television and radio public service announcements (PSA) and production files. <i>Arranged chronologically.</i> The type of media includes a combination of the following: video and audio tapes, | |

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| | cassettes, Compact Discs and/or hard copy. | |
| | Current Volume 4 c f Annual Accumulation less than 1 c f | |
| | (1) Public Service Announcements created through 1996 with related production files.* | PERMANENT. Upon approval of this schedule, transfer to NARA.* |
| | (2) Public Service Announcements created in 1997 and beyond with related production files.* | PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA when 2 years old.* |
| | B. Agency-sponsored video and audio cassettes intended for public distribution, including instructional and taxpayer educational material. Records also include stock file footage and B-roll (background footage) of service center activities. <i>Arranged chronologically.</i> | |
| | Current Volume 32 c f Annual Accumulation 2 c f | |
| | (1) Cassettes created through 1996 with related production files.* | PERMANENT. Upon approval of this schedule, transfer to NARA.* |
| | (2) Cassettes created 1997 and beyond with related production file.* | PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA when 2 years old.* |

*Audiovisual records will be transferred in accordance with 36 CFR 1228.184(c)(d)(e).

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| | C. Videotapes of sessions held by IRS officials at executive conferences or meetings. | Destroy when 2 years old. |
| 8. | <u>Training Videotapes</u> (1990 to present). Videotaped training classes for IRS employees produced by the IRS TV studio. | |
| | A. Videotapes of training sessions relating to the implementation of tax administration policy and procedures. | |
| | (1) Videotapes with related production file, if any, created through 1996 * | PERMANENT. Upon approval of this schedule, transfer to NARA.* |
| | (2) Videotapes with related production file, if any, created in 1997 and beyond.* | PERMANENT. Cutoff at the end of the calendar year. Transfer to NARA when 2 years old.* |
| | B. All other videotapes of administrative training classes. | Destroy when no longer needed. |
| 9. | <u>External Publications</u> (1989 to Present). Brochures, book marks, pamphlets containing information available to the general public on important and/or new tax information. | |

Current Volume 57 c f
 Annual Accumulation 3 c f

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| No. | | |
| | A. External publications issued by Headquarters. | PERMANENT. Upon approval of this schedule, transfer to NARA. |
| | (1) External publications through 1996. | PERMANENT. Cutoff at the end of the calendar year. Retire to Washington National Records Center in 2-year blocks when the oldest record is 2 years old. |
| | (2) External publications 1997 and beyond. | Transfer to NARA in 4-year blocks when newest record is 4 years old. |
| | B. External publications issued by the Field. | PERMANENT. Upon approval of this schedule, transfer to NARA. |
| | (1) External publications through 1996. | PERMANENT. Cutoff at the end of the calendar year. Retire to the Federal Records Center in 5-year blocks when the oldest records is 5 years old. |
| | (2) External publications 1997 and beyond. | Transfer to NARA in 5-year blocks when the newest record is 10 years old |

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| | C. Records determined during archival processing to lack sufficient archival value to warrant permanent retention by NARA. | Destroy immediately. |
| | D. Background files consisting of production files, background information and clearance information. | Destroy when 2 years old. |
| 10. | <u>Internal Publications</u> (1993 to Present). Information available to IRS managers and employees Nationwide on a variety of topics that document changes in tax administration and the structure of the IRS in booklet, brochure, or pamphlet format. <i>Arranged chronologically.</i> Current Volume 3 c f Annual Accumulation less than 1 c f | |
| | A. Record copy of Headquarters-issued internal publications. | |
| | (1) Headquarters-issued internal publications through 1996. | PERMANENT. Upon approval of this schedule, transfer to NARA. |

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|----------|---|--|
| | (2) Headquarters-issued internal publications 1997 and beyond. | PERMANENT. Cutoff at the end of the calendar year. Retire to the Washington National Records Center in 2-year blocks when the oldest record is 2 years old. Transfer to NARA in 4-year blocks when the newest record is 4 years old. |
| | B Internal publications issued by the Field | |
| | (1) Internal publications issued by the field through 1996 | PERMANENT. Upon approval of this schedule, transfer to NARA. |
| | (2) Internal publications issued by the field 1997 and beyond | PERMANENT. Cutoff at the end of the calendar year. Retire to the Federal Records Center in 5-year blocks when the oldest record is 5 years old. Transfer to NARA in 5-year blocks when newest record is 10 years old. |
| | C. Records determined during archival processing to lack sufficient archival value to warrant permanent retention by NARA. | Destroy immediately. |
| | D. Background files consisting of production files, background information and clearance information. | Destroy when 2 years old. |

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| 11. | <p><u>Internal Communications System.</u> Records consisting of an electronic bulletin board which is a news service available to all Public Affairs Officers. Information can be downloaded and news items used in local newsletters and news releases.</p> | |
| | <p>A. Input Documentation. Electronic transmission of news releases, bulletins, statistical reports, filing season information, changes in the tax law, and etc.</p> | <p>Delete electronic version when no longer needed for administrative, legal, audit, or other operational purposes.</p> |
| | <p>B. Output Documentation. Hard copy printouts created for short-term administrative purposes by the field Public Affairs Officers.</p> | <p>Destroy when no longer needed for administrative, legal, audit, or other operational purposes.</p> |