



Real Estate and Facilities Management IRS Records and Information Management (RIM) Program

RACO West – Customer Perspectives on ARCIS

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IRS RIM Program Perspectives on ARCIS

Current IRS records and information management profile

Staff assigned to the RIM Program help IRS employees.....

- Know their records management responsibilities
- Plan their records through periodic Inventories and Files Plans
- **Programs can't manage records if they don't know what they have**
- Maintain their program and administrative records compliantly
- Understand the IRS Records Control Schedules and apply them
- Schedule records that don't have an approved disposition
- Implement Records Legal Holds (Freezes)
- Preserve records before disposal (i.e. disaster mitigation)

IRS RIM Program Perspectives on ARCIS

Current IRS records and information management profile

Staff assigned to the RIM Program also help IRS employees.....

- Retire records out of IRS space to off-site storage
- Transfer records into IRS files and storage
- Retrieve records as needed, when needed
- Return records back to storage as necessary
- Dispose of records after official retention period has elapsed
- Transfer permanent records to the National Archives
- Track quantity of services requests to NARA FRCS
- Reconcile Monthly Invoices received from NARA for services

IRS RIM Program Perspectives on ARCIS

IRS Records and Information Management Organization

- 8 Central Office Staff who oversee all Records and Information Management Program functions
- 24 Area Records Managers geographically dispersed who coordinate records activities with the various Business Units
 - Area Records Managers, among their other duties, facilitate all FRC services requests for administrative and program records
- 8 Files Activities in each Service Center processing IRS tax returns and associated records (e.g. 1099, voucher, W-2)
 - Files Activity services all new tax returns for a period after processing and coordinates all FRC services requests for IRS tax forms generated through tax return, voucher filings, and accounts (payments and refunds)

IRS RIM Program Perspectives on ARCIS

Records Management Activity Profile

- Tax return and associated records volume = 6.3 million c.f.
- Program and administrative records volume = 500 K c.f.
- IRS has 58,000 accessions in Federal Records Centers
- IRS makes 6.5 million requests for tax returns each year
- IRS refiles or attaches 6.2 million tax returns each year
- FRCs accession 800,000 new boxes of tax returns each year
- FRCs dispose of 800,000 boxes of tax returns each year
- IRS makes 10,000 requests for program records each year
- FRCs accession 50,000 new boxes of program records each year
- FRCs dispose of 50,000 boxes of program records each year
- The total expenditures for storage and services = 36 million
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IRS RIM Program Perspectives on ARCIS

Expected benefits from ARCIS

- ✓ Automation reduces time spent daily on requesting services
- ✓ Asset Management allows ARMs to authorize users
- ✓ Automation reduces monthly accounting of services
- ✓ Asset Management facilitates accurate Invoice reconciliation
- ✓ Automation reduces 40 Files FTE used for manual batching
- ✓ Reduced cycle time for all services, notably retirements
- ✓ Improved data management on holdings
- ✓ Facilitates more accurate management decision-making
- ✓ Ensures FRC is keeping accurate holdings information
- ✓ Protect records from unauthorized disclosure
- ✓ Improves tracking for special searches, expedited requesting

IRS RIM Program Perspectives on ARCIS

Additional expected benefits from ARCIS

- ✓ Control retirement of tax returns (eased SFs 135 process)
- ✓ Improved cycle times and tracking of special projects (GAO)
- ✓ Coordinate destruction notices received for
tax return and administrative/policy/program records
- ✓ Monitor storage of tax return records for campus
- ✓ Improved routing and tracking of returned records for refile
- ✓ Improved control over tax return shipping and receipt
- ✓ Improved quality of reporting and records oversight

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