

.06 IRS Report - Local Office Manager Responsibilities

Local Office Management is responsible for ensuring that processing of the IRS reports is maintained in the highest possible degree of security. This includes the following:

- Restricting access to information to only those personnel who have a need to know the information.
- Maintaining the [CR530](#) and [CR550](#) reports in a secure area in the local office.
- Notifying [Office of Budget, Contracts and Reporting](#) via e-mail of receipt of the reports.
- Monitoring completion of the reports within 30 days.

NOTE The 30 days includes sending information requests AND completing the eligibility determination.

- Ensuring all appropriate office personnel are trained (both formally and informally) on a regular basis regarding security requirements of the IRS reports.
- Submitting User Affirmation Statements (J129) to Data Security on an annual basis; and as needed, when newly appointed primary and secondary staff are assigned. (See [IRS - Data Security](#))
- Ensuring the reports ARE NOT copied and placed in the [case file\(g\)](#).
- Returning the completed IRS reports to the Office of Budget, Contracts and Reporting when all eligibility actions are final, as follows:
 - Sealing the envelopes used to return the reports
 - Clearly marking the envelopes CONFIDENTIAL, IRS TAX INFORMATION
 - Sending completed reports to the [Office of Budget, Contracts and Reporting](#).