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Balanced Measure Review Report  
FOIA/PA Performance Measures - Office: Governmental Liaison & Disclosure Division

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DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
WASHINGTON, D.C. 20224

SMALL BUSINESS/SELF-EMPLOYED DIVISION

October 28, 2008

This letter responds to your Freedom of Information Act (FOIA) request of September 25, 2008, received in our office on October 9, 2008.

You asked for a copy of each Balanced Measures Review Report issued since January 1, 2007, each Balanced Measure Review Process Report from January 1, 2007 to the present, and a copy of the monthly FOIA Performance Measures Reports from January 1, 2007, to the present.

We are enclosing a copy of the requested records consisting of 39 pages. This is a full grant of your request.

If you have any questions please call Disclosure Tax Law Specialist Valerie Barta, ID # 245581, at 512-499-5211, or write to: Internal Revenue Service, Mail Stop 7000 AUS, 300 E. 8th Street, Austin, Texas 78701. Please refer to case number 50-2009-00043.

Sincerely,

*Mahlon E. Blagg*

Mahlon E. Blagg  
Acting Chief, Disclosure

Enclosure



DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
WASHINGTON, D.C. 20224

SMALL BUSINESS/SELF EMPLOYED DIVISION

September 14, 2007

MEMORANDUM FOR GOVERNMENTAL LIAISON AND DISCLOSURE AREA  
MANAGERS

FROM: Joseph R. Aceto /s/ Joseph R. Aceto  
Director, Governmental Liaison and Disclosure

SUBJECT: Balanced Measures Review Team (BMRT) – Observations  
and Recommendations

In July 2007, the BMRT examined a sample of 358 closed FOIA and Privacy Act cases for compliance with established standards of accuracy, completeness, and timeliness. The team met previously in January 2007 and reviewed 266 cases, and those findings are included in the report that follows.

I'm pleased to say that through you and your staffs' hard work and dedication to improvement, we are making positive progress. The concepts we discussed at the Disclosure Summit are clearly at work here, and as we continue to work closely together and apply our collective expertise to tackling and improving quality, I look forward to seeing even more progress in the future.

The chart below reflects the percentage of cases where the standard was met in each of the three areas examined for the past five reviews:

Standard	July 2005	January 2006	July 2006	January 2007	July 2007
Accuracy	88%	91%	93%	89%	91%
Completeness	92%	95%	95%	95%	96%
Timeliness	87%	95%	95%	91%	97%

The BMRT found positive progress in many areas, and identified some aspects within each of the standards that require additional focus in order to improve overall compliance.

**Accuracy Standard** statistics for the last three reviews, by aspect, are as follows:

Accuracy Standard	July 2006	January 2007	July 2007
<b>OVERALL RATING</b>	92.63%	89.18%	91.47%
The request was properly controlled on the inventory system	90.38%	93.61%	94.13%
The caseworker recognized that the request met or did not meet the FOIA/PA validity requirements	96.79%	95.40%	96.35%
The caseworker recognized that any authorization/POA was valid	92.42%	95.65%	94.90%
Proper determination made on releasability	94.41%	83.87%	89.89%
The appropriate closing code was used	92.42%	89.06%	92.46%
All correspondence, including the response, was clearly and professionally written and technically accurate	89.50%	81.23%	82.86%

#### **Accuracy Findings:**

- In the vast majority of cases reviewed, Disclosure staff continues to properly control requests and correctly determine that requests and accompanying authorizations are valid.
- We're doing well in three aspects of this standard, but we need to work a bit more on the other three. For example, in July 2007, the most common reasons for rating cases "not met" in this standard were that caseworkers did not conduct a search for responsive records, or their search was inadequate. In some cases, requesters were told documents did not exist or could not be located when there was no evidence in the file that any search for records took place. Most commonly, these cases involved microfilm or retention records that would have been available if requested. In many of these cases it was unclear whether the search did not occur or the search simply was not documented. Ten of 30 (33%) of the cases rated "not met" in January and 79% (22 of 28) of the cases rated "not met" in July contained errors relating to record searches.
- Another area in which we can improve is to focus on the proper use of closing codes. There were 27 documented instances where the closing code was incorrect. The most common errors that the team observed are:
  - Four cases closed as "N," no record, that should have been "C," closed prior to initial determination
  - Four cases closed as "G," grant, that should have been "P," partial
  - Three cases closed as "I," imperfect, that should have been "R," routine agency procedure
  - Four cases closed as "I," imperfect, that should have been "N," no record

- Approximately 17% of all correspondence reviewed in January and July had significant spelling and grammatical errors or was technically inaccurate. Some type of grammatical error was noted in 25 letters. The technical inaccuracies noted in the letters issued occurred when IRM procedures were not followed. Although there was no trend, some examples of the technical errors are:
  - Requester was advised that he had 30 days to perfect his request. In fact the requester has 35 days per IRM 1.3.13.5.3.
  - Items cited as requested on reply letter did not correspond to those on the actual request.
  - Response also did not address all requested items.
- Fifteen letters reviewed included local pattern language that was not reviewed or approved by the Pattern Letters Team. There were also instances where pattern letter templates were used incorrectly. For example, not all required blanks were filled in, or there was information about requested items pertaining to a previous case that was not removed.

**Completeness Standard** statistics for the last three reviews, by aspect, are as follows:

Completeness Standard	July 2006	January 2007	July 2007
<b>OVERALL RATING</b>	95.03%	94.66%	96.10%
The case file documents all case activities	97.65%	94.68%	93.80%
The response included the total number of pages responsive, denied in full, denied in part, and granted in full	94.36%	99.21%	96.88%
The response addressed all requested items	97.72%	96.76%	97.17%
Provided Notice 393 when documents have been partially or fully withheld, or no responsive records located	86.59%	91.30%	95.71%
The requester was kept apprised of the status of the request throughout the process	94.25%	87.88%	99.26%
Explained assertion or waiver of fees when needed	94.74%	85.71%	95.52%

#### **Completeness Findings:**

- It's great to see that Disclosure caseworkers continue to provide a complete response to FOIA requests, as evidenced by the sustained high percentage in this standard. The overall rating is 96%, and significant improvements were noted in two aspects: the proper issuance of Notice 393, and notifying the requester about the status of the request.

- Where can we do a little better? Case history notes do not reflect all actions taken when compared to the documentation in the file. The error rate for this aspect was 6% of all cases reviewed in July. There were several instances where documents such as copies of extension letters were in the file, but there was no corresponding entry in the case notes indicating that an extension letter was sent.

**Timeliness Standard** statistics for the last three reviews, by aspect, are as follows:

Timeliness Standard	July 2006	January 2007	July 2007
<b>OVERALL RATING</b>	95.25%	91.38%	96.72%
Significant activity on the request began within a reasonable time frame	93.18%	92.75%	94.38%
Days in process are appropriate based on the complexity of the request	96.74%	84.41%	97.17%
Time charged performing case activities was commensurate with case difficulty	98.23%	90.87%	98.31%
The response or Letter 1522 was sent within the statutory 20 business day time limit	95.27%	96.91%	99.14%
A response or additional extension letter was sent within the time stipulated in Letter 1522 or any additional extension	89.04%	98.00%	92.77%
Case notes were updated at least every 30 days, unless the case was closed within the initial 30-day time frame	90.14%	88.24%	91.46%

#### **Timeliness Findings:**

- Timeliness continues to improve with an overall rating of close to 97% in the most recent review. This marks excellent progress, which was also noted in the Treasury Inspector General for Tax Administration (TIGTA) annual review. Executive Order 13392 mandated use of a different standard, termed backlog, to measure the timeliness of FOIA inventory. The Order defines backlog as any case that is over the 20 business days allowed for processing by statute. Since the IRS is required to report to Treasury on a monthly basis using this standard, it is imperative that we continue our emphasis on timely case processing within the 20-day timeframe.
- We made significant progress between January and July. For example, more than 15% of the cases reviewed in January were in-process for an excessive amount of time, based on an analysis of records requested and the other documentation in the case file. In July, this improved to less than 3%. The BMRT attributed the improvement in the July review to targeted efforts designed to address the Treasury backlog. However, 6% of all cases reviewed still did not

have significant activity taken within a reasonable time, which could negatively impact our ability to meet Treasury backlog reduction requirements.

- Where cases were open longer than the initial statutory time frame, approximately 8% did not meet the requirement that open cases be reviewed and appropriate action taken at least once every 30 days.

**Guidance and Direction for Continued Improvement by Area Managers, Disclosure Managers, and Caseworkers:**

Disclosure Managers must continue to be actively involved in processing activities through closed and in-process case reviews, workload reviews, and other activities to ensure that cases meet established quality standards.

I. The following actions will help improve **Accuracy**:

***1. Disclosure Managers should:***

- Confirm that search actions and determinations are based on a correct interpretation of the request and the underlying facts, an accurate review of IDRS information, and proper application of IRM guidance. HQ Disclosure is currently revising existing IDRS training for delivery in the first quarter of FY 08 to help address any inconsistencies regarding adequacy of search.
- Ensure that staff carefully analyzes requests to understand what is actually requested. Search efforts must include an attempt to secure reasonably described records. Case history notes must document all search efforts.
- Review a sample of “no records” responses to ensure that an adequate search for records took place.
- Verify that requests are not closed as imperfect when the threshold for charging fees is not reached, simply because the request contains no agreement to pay fees (see IRM 11.3.13.5.3(3)). Closing cases improperly in this manner leaves Disclosure vulnerable to adverse appeals decisions and possible litigation. A recent Disclosure Technical Update provided training to all Disclosure employees about the application of fees.
- Ensure that requests for transcripts on retention are processed in accordance with IRM 11.3.13.6.3(12) and the June 30, 2006 Disclosure Dispatch article entitled “FOIA: Guidance on Processing Requests for Specific Transcripts.” These requests were not always handled correctly, and there were several instances where no search was done.

**2. Disclosure Managers should:**

- Review closing codes with their staff during periodic group meetings and ensure that staff members who close cases are aware of the appropriate uses for each code. Reference materials such as IRM 11.3.13.8.2 and the February 2006 edition of the Disclosure Dispatch, which contains a closing code guide, can serve as supplements to the discussion.
- Note: Headquarters Disclosure will make closing codes a topic for a future Disclosure Technical Update to further assist the field.

**3. Caseworkers should:**

- Prepare correspondence that is professional, free of errors, and free of statements that do not pertain to the records request. They must also document their interpretation of legal guidance regarding release of records and follow current IRS policy as stated in IRM 11.3.13.
- Use spelling and grammar checks on all correspondence before issuance.
- Perform a careful review of the correspondence to ensure that it contains no errors, prior to review and signing.
- Send correspondence to the Disclosure Manager for final review, prior to sending out.
- Clearly identify, in case file documentation, who signed the correspondence. If the signer is someone other than the Disclosure Manager, documentation in the letter or case file must explain that person's authority to sign. This may include a case history note or an indication on the typed signature line that the signer is "Acting" Disclosure Officer. The word "Acting" may be handwritten. Where Senior Specialists have delegated authority to sign, they must sign under their own authority, not as the Disclosure Manager. As recently discussed at the Disclosure Summit, and reinforced by HQ Disclosure written guidance, a copy of all correspondence sent to the requester must be retained in the case file.
- Reflect correct technical determinations that are fully documented in case histories, in the response letters. Follow IRM procedures relating to special issues or items.



#### **4. Caseworkers should:**

- Use Pattern Letter templates whenever possible to ensure consistency, accuracy, and professionalism in our products.
- Note: Caseworkers may not routinely use their own locally developed pattern responses without prior approval from the Pattern Letters Team.
- Review pattern correspondence to confirm that all fill-in items contain correct information and that all prompts enclosed by carets are replaced with case specific information.
- Note: As agreed during the Disclosure Summit, Disclosure Managers are reviewing all letters until such time as they determine their reviews are not adding value.

#### **5. Disclosure Managers should:**

- Comply with the provisions of IRM 11.3.13.8(9) that require a Senior Specialist or a Disclosure Manager to review all cases that are not full grants, unless the authority to sign denials and partial denials is delegated to a remotely-located Specialist.

### **II. The following actions will help improve **Completeness**:**

#### **1. Disclosure Managers should:**

- Emphasize to their staffs that case notes must reflect all significant case related activities.
- Address the issue of complete case notes during staff meetings and case reviews, to ensure that all employees are properly documenting actions; this will clarify the audit trail and support time charged on cases.

### **III. The following actions will help improve **Timeliness**:**

#### **1. Area Managers should:**

- Reinforce the need for timely actions on newly assigned cases, particularly imperfect requests that do not require a search, and requests for transcripts of account that are not available via RAIVS. All case, workload, and operational reviews must address the early recognition of imperfect requests

and requests where no responsive records exist. These factors should be included in all reviews of Disclosure Offices and documented as necessary. Appropriate initial actions will help to meet the Treasury backlog reduction requirement.

- Note: The Senior Disclosure Specialist Task Team is currently developing check-sheets to help caseworkers determine the validity of a request and appropriate steps to initiate the search for records and/or response to the request. This will facilitate initial timely actions by caseworkers on all assigned cases.

**Summary:**

Keep up the good work. We are building on a very strong and sound base of high quality in the Disclosure organization. These actions are simple steps that each person throughout our organization can daily apply to improve quality even more.

I expect each GLD Area Manager and Disclosure Manager to actively work to implement this guidance.

As we discussed at the Disclosure Summit, it will take all of us working together to ensure these recommendations become a regular part of our daily work. Thank you for your continued dedication to delivering a quality Disclosure program and for your efforts to put these good business practices into place. My thanks also go to the Balanced Measures Review Team for their dedication to excellence in assessing the quality of our work products.

If you have any questions, please contact the Chief, Disclosure, Albert D. Adams, Jr., at (202) 283-2203.



DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
WASHINGTON, D.C. 20224

SMALL BUSINESS/SELF EMPLOYED DIVISION

MEMORANDUM FOR GOVERNMENTAL LIAISON AND DISCLOSURE AREA  
MANAGERS

FROM: Joseph R. Aceto /s/ *Joseph R. Aceto*  
Director, Governmental Liaison and Disclosure

SUBJECT: Balanced Measures Review Team (BMRT) – Report and  
Recommendations

In January 2008, the BMRT examined a sample of 372 closed FOIA and Privacy Act cases for compliance with established standards of accuracy, completeness, and timeliness. I am gratified to see that the results of this latest BMRT review demonstrate that we have sustained the positive progress noted in the prior review. It is apparent that you and your staffs have continued to work hard and focus on balancing quality and productivity.

Nonetheless, the report indicates there are some areas where we can do better. Consider this another opportunity for incremental improvement, as we work to improve the consistency of our responses in service to our customers and standardize our work processes while striving to meeting the statutory obligations of the FOIA. Please note that this is the final BMRT report since we plan to implement the Disclosure Quality Measurement System (DQMS) by August 1, 2008.

While there has been a great deal of focus on the timeliness standard in working to reduce our backlog of FOIA cases, a quality case must also meet the accuracy and completeness standards. We meet these standards by fully responding to requests for records and ensuring technical accuracy in every interaction with our customers

The chart below reflects the percentage of cases where the standard was met in each of the three areas examined for the past five reviews:

Standard	January 2006	July 2006	January 2007	July 2007	January 2008
Accuracy	91%	93%	89%	91%	91%
Completeness	95%	95%	95%	96%	96%
Timeliness	95%	95%	91%	97%	96%

As noted in the attached report, the BMRT found positive progress in many areas, and identified some aspects within each of the standards where additional focus will improve overall performance. Specifically:

- I encourage you to take prompt substantive action upon initial receipt of each new request to ensure quality customer service and to efficiently manage your inventory.
- Carefully proofread letters and consistently use the approved pattern letters. The letters are not optional for use. They are designed to ensure our customers get high quality responses every time, no matter where they file their FOIA request.
- A focus on technical accuracy should complement our increased emphasis on responding to FOIA requests within the statutory time frame. Requests that are imperfect for lack of valid authorization to receive records, failure to make an adequate fee commitment, or failure to clearly identify the records desired cannot not be processed under the FOIA and should be closed within the statutory period in support of our FOIA<20 initiative.
- You have made great progress in achieving the backlog reduction. This year, more than ever, we are being asked to deliver both timely and top quality responses to our customers.

I ask that you review the findings of the attached BMRT report, implement the recommendations, and build on the progress we have achieved. I expect every Area Manager and Disclosure Manager to include the quality standards in every case review. It is important that all Disclosure staff understand that all three quality aspects must be met on each case to produce satisfied customers and comply with the FOIA and disclosure procedures.

If you have any questions concerning this report, please contact Mahlon Blagg, Acting Chief Disclosure at (405) 297-4049.

**Balanced Measure Review Report  
January 2008 Results**

The BMRT met during in January and reviewed 372 cases in accordance with the FOIA/PA QR check sheet standards. Each case was measured against the three standards of a quality case: Accuracy, Timeliness, and Completeness. The findings are reported below.

**Accuracy Standard** statistics for the last three reviews, by aspect, are as follows:

Accuracy Standard	January 2007	July 2007	January 2008
<b>OVERALL RATING</b>	89%	91%	91%
The request was properly controlled on the inventory system	94%	94%	96%
The caseworker recognized that the request met or did not meet the FOIA/PA validity requirements	95%	96%	98%
The caseworker recognized that any authorization/POA was valid	96%	95%	87%
Proper determination made on releasability	84%	90%	91%
The appropriate closing code was used	89%	92%	94%
All correspondence, including the response, was clearly and professionally written and technically accurate	81%	83%	82%

**Accuracy Findings:**

The rating exceeded 90% in four of the Accuracy elements.

- Disclosure caseworkers correctly determined whether a FOIA request was valid 98% of the time, the best we have achieved in recent reviews. This is significant because proper validity determinations form the basis for all work that follows. Three other aspects of this standard were highly rated: inventory control, making proper determinations on release, and using correct closing codes. Since last year's review identified the correct use of closing codes as an element for improvement, there has been steady progress in this area.
- Caseworkers need to pay particular attention to ensuring powers of attorney and authorizations (POA) are valid. The accuracy rate for this standard decreased to 87% for the following reasons:
  - In five of the 14 cases rated "not met," the elements of the POA did not allow disclosure of some or all of the requested information.
  - Two cases for Trust Fund Recovery Penalty (TFRP) files had powers of attorney that did not include a specific reference to the TFRP. Remember that a TFRP is a separate individual tax matter that must be specifically identified on the power of attorney or authorization.
  - The POA had stamped taxpayer signatures.

- The POA contained signatures of an individual who did not demonstrate material interest in the requested corporate returns.
- A copy of the POA did not accompany the request and the caseworker did not document any attempts to verify the requester's status.
- The POA was signed by an unenrolled preparer who was not identified as the preparer of the return.
- Corporate tax information was disclosed in a transferee situation although the POA covered only individual tax information.

Verifying the validity of every POA is a priority to avoid unauthorized disclosure of information not specifically authorized by the taxpayer for release.

- The case review results demonstrated a continuing need to improve the accuracy, tone, and grammar of correspondence. Errors were less likely to occur when pattern letters were used. Approximately 18% of all the correspondence reviewed had spelling or grammatical errors or was technically inaccurate. This is a duplicate finding from the last review. Specifically:
  - Sixty-eight responses reviewed were not clearly or professionally written or contained technical errors.
  - Eleven responses did not use pattern letter wording or included inappropriate changes to a pattern letter.
  - Twenty responses had grammatical, spelling, or punctuation errors.
  - Thirty-three cases did not use pattern letter correspondence when required.
- Although no specific trends were identified, the team found technical errors in 20 letters. Consider the following examples:
  - The requester was notified that regulations allow for a \$5,000 penalty for making frivolous FOIA requests when in fact there is no such penalty.
  - The caseworker did not address the request for an expedited response.
  - A requester provided his SSN. The caseworker searched for requested BMF records using the provided SSN, formatted as an EIN. This could result in the release of information of an unrelated business taxpayer.
  - A requester was erroneously notified that the IRS does not accept copied signatures.

The following recommended actions will help improve **Accuracy**:

***When reviewing correspondence for signature or conducting case reviews, Disclosure Managers should ensure:***

- Requests made on behalf of a taxpayer are accompanied by a Form 2848, 8821, or other valid authorization that covers all types of tax and periods requested.
- Correspondence has no grammatical or spelling errors, is appropriate in tone, and pattern language is used where appropriate.

- Any deviations from pattern letter language are approved.
- A Senior Specialist or Disclosure Manager reviews cases that are not full grants as required by IRM 11.3.13.8(9).
- Ensure employees are trained in the efficient and effective use of pattern letters.

***Disclosure Caseworkers should:***

- Match POAs or other authorizations to the request to verify the requester authorized the release of records.
- Ensure correspondence is consistent, accurate, and professional. It must be free of statements that do not pertain to the records requested.

To achieve these objectives, caseworkers must:

- Use required pattern letters whenever possible.
- Use spell check and grammar check on all correspondence before issuance.
- Carefully proofread correspondence prior to signature and correct errors.
- Check that all the fill-in items are correct.
- Replace all prompts enclosed by carets with case specific information.
- Forward cases requiring review or deviation from pattern language to Disclosure Manager or delegated Senior Specialist for approval prior to mailing.
- Recommend pattern letter changes to the Headquarters Disclosure Manager where needed rather than modifying standard language.
- Document any interpretation of legal guidance regarding release of records.

**Completeness Standard** statistics for the last three reviews, by aspect, are as follows:

Completeness Standard	January 2007	July 2007	January 2008
<b>OVERALL RATING</b>	95%	96%	96%
The case file documents all case activities	95%	94%	95%
The response included the total number of pages responsive, denied in full, denied in part, and granted in full	99%	97%	97%
The response addressed all requested items	97%	97%	99%
Provided Notice 393 when documents have been partially or fully withheld, or no responsive records located	91%	96%	93%
The requester was kept apprised of the status of the request throughout the process	88%	99%	100%
Explained assertion or waiver of fees when needed	86%	96%	87%

### **Completeness Findings:**

- An excellent finding was that Disclosure caseworkers kept requesters apprised of the status of their FOIA requests throughout the process in 100% of the cases reviewed. In addition, caseworkers are properly documenting mail and phone contacts with requesters.
- In six cases, caseworkers either failed to provide Notice 393 on a “No Records” response or inappropriately provided the Notice on “Full Grants.”
- In several cases, history notes included information that was not pertinent to case processing. For example, one case included a discussion of why the taxpayer was audited based on review of the examination documents. E-DIMS case histories should document Disclosure case-related activity and contain no extraneous information or editorial comments. Stick to the facts when writing notes!
- Explanation of fee waivers and fee charges continues to be an area requiring improvement. There was a 9% decline in meeting this element since the last review. For example, caseworkers failed to explain how fees were determined on aggregated requests and failed to address fee waivers requested in their response when no fees are due.

The following recommended actions will help improve **Completeness**:

#### ***Disclosure Managers should:***

- Address the content of case notes in staff meetings and case reviews to ensure they reflect significant case related activities and include no extraneous information.
- Review Notice 393 requirements from IRM 11.3.13.8.2 with staff.

#### ***Disclosure Caseworkers should:***

- Ensure correspondence properly explains the assertion of fees when necessary.
- Identify and address requests for fee waivers, including an explanation when no fees are due (use the approved pattern letter language for this purpose).
- Include only documentation that is relevant to case activities in history notes.



**Timeliness Standard** statistics for the last three reviews, by aspect, are as follows:

Timeliness Standard	January 2007	July 2007	January 2008
<b>OVERALL RATING</b>	91%	97%	96%
Significant activity on the request began within a reasonable time frame	93%	94%	92%
Days in process appropriate based on the complexity of the request	84%	97%	94%
Time charged performing case activities was commensurate with case difficulty	91%	98%	98%
The response or Letter 1522 was sent within the statutory 20 business day time limit	97%	99%	99%
A response or additional extension letter was sent within the time stipulated in Letter 1522 or any additional extension	98%	93%	98%
Case notes were updated at least every 30 days, unless the case was closed within the initial 30-day time frame	88%	91%	97%

#### **Timeliness Findings:**

- The overall timeliness rating remains very high. This reflects a high level of customer service and has resulted in a continual reduction of the FOIA backlog in positive reports to Treasury.
- There was a significant increase in compliance with the requirement to review open cases and take appropriate action at least once every 30 days.
- A consistent excellent rating of 98% was achieved on the element "Time charged was commensurate with case complexity and difficulty."
- Approximately 8% of the cases reviewed did not have significant activity taken within ten calendar days of receipt. However, the majority of these requests were still closed by the statutory due date. While generally meeting our statutory obligation, the customer could have received a more expeditious response.
- In cases that did not meet the standard:
  - E-DIMS history notes did not indicate any reason for the delay.
  - Some delays were due to the case being assigned while the caseworker was on leave or in training.
  - In one instance the delay was explained as being due to holidays. However no holiday occurred between the date of receipt and initial action (July 27-Aug 14).
- In 5% of the cases reviewed, the days in process were excessive based on an analysis of information in the file. For example: delayed responses to requests for transcripts or in situations where the caseworker quickly determined there were no responsive documents but did not immediately issue a final response.

The following actions will help improve **Timeliness**:

***Disclosure Managers should:***

- Ensure that caseworkers understand the need for significant activity within ten calendar days of receipt on newly assigned cases. Case reviews should include a comment about timeliness of initial action.
- If possible, avoid assigning cases to caseworkers who will be out of the office for an extended period.

***Disclosure Caseworkers should:***

- Take substantive appropriate action on first analysis, paying particular attention to cases that can be closed immediately. These include:
  - Imperfect requests that do not require a search
  - Requests for information available under routine established procedures. Extension letters are inappropriate in these situations since the cases are not being processed under the FOIA.

**Summary:**

This BRMT review found excellent or sustained quality results in three areas:

- Determining the validity of requests.
- Charging technical case time commensurate with the complexity of the request.
- Keeping requesters apprised of the status of their request 100% of the time, with all requester contacts documented in the cases reviewed.

Noted areas of improvement since the last review include the proper reporting of disposition codes and steady progress in reducing the FOIA backlog.

Recommendations for improvement are concentrated in three areas:

- Ensuring the validity of POAs before processing requests for tax records.
- The need to review correspondence for accuracy, tone and grammar as well as increased routine use of the approved pattern letters.
- Taking appropriate initial action on cases upon first analysis and properly documenting any reason for delay.

Quality FOIA case processing is building on a strong and sound base of quality throughout the Disclosure organization. The recommended actions focus on the basics with attention to detail. They are simple steps that Disclosure staff can apply daily to achieve a higher, consistent level of quality in responding to FOIA requests.

Friday, November 9 2007

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	1	41	1,956	64	2,062	86.0	46.0	26.0	20.0	26.0	43.0	115.6	91.4	27.1	89.8
Receipts	5	244	17,304	287	17,840	—	—	—	—	—	—	—	—	—	—
Imperfects	2	26	3,300	61	3,389	6.0	7.5	10.0	19.0	10.0	6.0	10.3	17.0	26.6	17.1
Transfers	0	10	183	1	194	0.0	12.5	15.0	25.0	14.5	0.0	25.2	33.4	25.0	32.7
Grants	0	155	6,474	173	6,802	0.0	15.0	25.0	29.0	25.0	0.0	29.8	38.0	34.4	37.7
Partial Denials	1	21	2,248	15	2,285	7.0	40.0	61.0	46.0	60.0	7.0	71.7	89.5	64.1	89.1
Full Denials	1	7	233	0	241	29.0	52.0	29.0	0.0	29.0	29.0	89.7	66.3	0.0	66.6
No Records	0	15	3,321	52	3,388	0.0	29.0	21.0	22.0	21.0	0.0	60.2	34.0	33.1	34.1
Withdrawn	0	9	237	6	252	0.0	10.0	58.0	70.5	52.5	0.0	13.1	151.9	89.3	144.9
Closed prior to Init Detr	1	22	936	15	974	117.0	26.5	16.0	22.0	17.0	117.0	79.0	62.4	33.7	62.4
Total Closures	6	266	17,626	333	18,231	12.0	16.0	23.0	28.0	23.0	30.0	37.8	42.2	34.8	42.0
Ending Inventory	0	19	1,634	18	1,671	0.0	54.0	17.0	13.0	17.0	0.0	127.4	78.2	37.6	78.2
Annual Report Data					14,648					27.0					47.9

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	1,358	\$232,088.58	Commercial 184	Units 18,594	Disclosure 62,442	(b)(1) 0	26 USC 6103 1,925
Cases Collected	1,065	\$194,540.58	Media 7	Tax Periods 115,455	Other Functions 2,779	(b)(2) 81	5 USC 7114 2
Cases Outstanding	323	\$ 47,815.04	Ed. Inst. 15	Pages Reviewed 1,861,511		(b)(3) 2,000	18 USC 701 47
			Scientific 0	Released 1,306,741		(b)(4) 42	Rule 6(e) FR 11
			Government 7			(b)(5) 495	31 USC 5319 44
			Other 1,562			(b)(6) 497	26 USC 6105 7
Fee Waivers Req'd	64		Total 1,775			(b)(7) 14	41 USC 253b 3
Granted	4					(b)(7)(A) 463	Other 0
Denied	58					(b)(7)(B) 4	
Partial	2					(b)(7)(C) 786	
						(b)(7)(D) 49	
						(b)(7)(E) 950	
						(b)(7)(F) 13	
						(b)(8) 0	
						(b)(9) 0	

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	16	1,762	30	1,808	0.0	69.0	45.0	21.0	45.0	0.0	152.8	102.5	28.3	101.6
Receipts	0	14	1,420	17	1,451	—	—	—	—	—	—	—	—	—	—
Imperfects	0	2	249	4	255	0.0	3.0	9.0	14.5	9.0	0.0	3.0	16.0	13.3	15.8
Transfers	0	2	17	0	19	0.0	12.5	33.0	0.0	27.0	0.0	12.5	28.6	0.0	24.3
Grants	0	8	478	11	497	0.0	20.5	27.0	17.0	27.0	0.0	20.5	38.8	24.5	38.1
Partial Denials	0	4	162	0	166	0.0	14.0	63.0	0.0	62.5	0.0	20.8	69.9	0.0	67.9
Full Denials	0	0	12	0	12	0.0	0.0	58.0	0.0	58.0	0.0	0.0	67.0	0.0	53.6
No Records	0	0	293	3	296	0.0	0.0	23.0	44.0	23.0	0.0	0.0	32.7	57.3	32.7
Withdrawn	0	1	19	0	20	0.0	3.0	47.0	0.0	47.0	0.0	3.0	134.5	0.0	116.3
Closed prior to Init Detr	0	0	50	1	51	0.0	0.0	20.5	44.0	21.0	0.0	0.0	30.5	44.0	29.6
Total Closures	0	17	1,319	20	1,356	0.0	14.0	26.0	22.0	26.0	0.0	16.5	37.6	33.2	37.2
Ending Inventory	0	13	1,863	27	1,903	0.0	146.0	48.0	48.0	48.0	0.0	201.8	102.0	44.2	101.8
Annual Report Data					1,082					28.0					42.5

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	88	\$ 11,292.12	Commercial 3	Units 1,355	Disclosure 4,691	(b)(1) 0	26 USC 6103 146
Cases Collected	78	\$ 13,151.96	Media 0	Tax Periods 7,576	Other Functions 57	(b)(2) 2	5 USC 7114 0
Cases Outstanding	12	\$ 728.30	Ed. Inst. 0	Pages Reviewed 144,322		(b)(3) 153	18 USC 701 7
			Scientific 0	Released 86,084		(b)(4) 2	Rule 6(e) FR 0
			Government 2			(b)(5) 35	31 USC 5319 6
			Other 98			(b)(6) 39	26 USC 6105 0
Fee Waivers Req'd	5		Total 103			(b)(7) 3	41 USC 253b 0
Granted	0					(b)(7)(A) 36	Other 0
Denied	5					(b)(7)(B) 1	
Partial	0					(b)(7)(C) 61	
						(b)(7)(D) 4	
						(b)(7)(E) 67	
						(b)(7)(F) 1	
						(b)(8) 0	
						(b)(9) 0	

Thursday, August 23 2007

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	13	1,863	27	1,903	0.0	147.0	49.0	49.0	49.0	0.0	202.8	103.0	45.1	102.8
Receipts	1	26	1,429	20	1,476	—	—	—	—	—	—	—	—	—	—
Imperfects	1	1	229	7	238	3.0	5.0	7.0	42.0	7.0	3.0	5.0	15.5	41.3	16.1
Transfers	0	1	13	0	14	0.0	30.0	16.0	0.0	16.0	0.0	30.0	30.9	0.0	27.0
Grants	0	12	478	12	502	0.0	22.0	26.0	27.0	26.0	0.0	27.1	37.9	36.0	37.6
Partial Denials	0	1	139	0	140	0.0	465.0	78.0	0.0	78.0	0.0	465.0	111.4	0.0	112.3
Full Denials	0	0	17	0	17	0.0	0.0	23.0	0.0	23.0	0.0	0.0	96.1	0.0	81.7
No Records	0	1	269	8	278	0.0	10.0	17.0	6.0	16.5	0.0	10.0	29.1	26.6	28.9
Withdrawn	0	0	18	0	18	0.0	0.0	33.0	0.0	33.0	0.0	0.0	58.3	0.0	50.0
Closed prior to Init Detr	0	0	77	0	77	0.0	0.0	11.0	0.0	11.0	0.0	0.0	51.4	0.0	49.5
Total Closures	1	16	1,302	31	1,350	3.0	22.0	21.0	26.0	21.0	3.0	52.2	40.9	30.7	40.8
Ending Inventory	0	23	1,990	16	2,029	0.0	23.0	33.0	23.0	33.0	0.0	108.0	96.4	45.4	96.1
Annual Report Data					1,098					25.0					46.2

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	105	\$ 22,332.80	Commercial 12	Units 1,408	Disclosure 4,688	(b)(1) 0	26 USC 6103 120
Cases Collected	87	\$ 17,121.70	Media 0	Tax Periods 10,736	Other Functions 192	(b)(2) 3	5 USC 7114 0
Cases Outstanding	19	\$ 5,609.60	Ed. Inst. 0	Pages Reviewed 127,734		(b)(3) 125	18 USC 701 3
			Scientific 0	Released 112,633		(b)(4) 4	Rule 6(e) FR 1
			Government 0			(b)(5) 38	31 USC 5319 2
			Other 109			(b)(6) 34	26 USC 6105 0
Fee Waivers Req'd	3		Total 121			(b)(7) 0	41 USC 253b 1
Granted	0					(b)(7)(A) 23	Other 0
Denied	3					(b)(7)(B) 0	
Partial	0					(b)(7)(C) 43	
						(b)(7)(D) 0	
						(b)(7)(E) 53	
						(b)(7)(F) 0	
						(b)(8) 0	
						(b)(9) 0	

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	23	1,525	16	1,564	0.0	24.0	24.0	24.0	24.0	0.0	109.0	109.4	49.2	108.7
Receipts	0	40	1,230	24	1,294	—	—	—	—	—	—	—	—	—	—
Imperfects	0	2	183	7	192	0.0	5.5	7.0	6.0	6.0	0.0	5.5	12.0	13.7	11.9
Transfers	0	3	15	0	18	0.0	8.0	6.0	0.0	7.5	0.0	9.7	8.1	0.0	7.6
Grants	0	11	465	6	482	0.0	5.0	20.0	24.0	19.5	0.0	33.2	28.2	32.5	28.3
Partial Denials	0	0	154	0	154	0.0	0.0	52.0	0.0	52.0	0.0	0.0	80.4	0.0	78.9
Full Denials	0	1	31	0	32	0.0	52.0	21.0	0.0	21.0	0.0	52.0	56.1	0.0	52.7
No Records	0	1	214	1	216	0.0	11.0	18.0	37.0	18.0	0.0	11.0	27.0	37.0	26.9
Withdrawn	0	3	44	2	49	0.0	7.0	76.0	106.0	75.0	0.0	7.3	132.6	106.0	121.4
Closed prior to Init Detr	0	1	62	0	63	0.0	43.0	18.5	0.0	19.0	0.0	43.0	32.8	0.0	31.9
Total Closures	0	22	1,211	18	1,251	0.0	7.0	20.0	16.0	19.0	0.0	24.2	36.1	31.6	35.8
Ending Inventory	0	41	1,544	22	1,607	0.0	8.0	30.0	18.0	30.0	0.0	67.5	107.8	37.4	105.8
Annual Report Data					1,041					22.0					40.6

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	127	\$ 42,320.85	Commercial	38	Units 1,244	Disclosure 4,116	(b)(1) 0 26 USC 6103 139
Cases Collected	69	\$ 20,276.96	Media	0	Tax Periods 9,575	Other Functions 192	(b)(2) 4 5 USC 7114 0
Cases Outstanding	60	\$ 22,053.89	Ed. Inst.	0	Pages Reviewed 136,504		(b)(3) 146 18 USC 701 5
			Scientific	0	Released 108,152		(b)(4) 5 Rule 6(e) FR 0
			Government	0			(b)(5) 37 31 USC 5319 3
			Other	109			(b)(6) 35 26 USC 6105 0
Fee Waivers Req'd	8		Total	147			(b)(7) 1 41 USC 253b 0
Granted	1						(b)(7)(A) 40 Other 1
Denied	7						(b)(7)(B) 1
Partial	0						(b)(7)(C) 54
							(b)(7)(D) 0
							(b)(7)(E) 77
							(b)(7)(F) 0
							(b)(8) 0
							(b)(9) 0

Monday, May 14 2007

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
						MEDIAN					MEAN				
Beginning Inventory	0	41	1,975	22	2,038	0.0	9.0	44.0	19.0	42.0	0.0	68.5	103.7	38.4	102.3
Receipts	0	11	1,615	18	1,644	—	—	—	—	—	—	—	—	—	—
Imperfects	0	8	275	4	287	0.0	12.0	12.0	13.0	12.0	0.0	10.8	19.7	17.5	19.3
Transfers	0	1	8	0	9	0.0	133.0	14.5	0.0	15.0	0.0	133.0	14.6	0.0	22.7
Grants	0	14	542	9	565	0.0	14.0	24.0	25.0	24.0	0.0	14.6	34.2	30.0	33.6
Partial Denials	0	3	154	0	157	0.0	21.0	56.0	0.0	56.0	0.0	19.3	76.3	0.0	74.3
Full Denials	0	0	11	0	11	0.0	0.0	27.0	0.0	27.0	0.0	0.0	41.3	0.0	32.4
No Records	0	2	314	5	321	0.0	25.0	15.0	62.0	15.0	0.0	25.0	26.2	67.4	26.8
Withdrawn	0	0	28	0	28	0.0	0.0	48.5	0.0	48.5	0.0	0.0	86.4	0.0	78.1
Closed prior to Init Detr	0	5	92	1	98	0.0	20.0	12.0	8.0	12.0	0.0	19.2	31.2	8.0	30.0
Total Closures	0	33	1,499	19	1,551	0.0	14.0	21.0	25.0	20.0	0.0	19.0	34.9	36.1	34.5
Ending Inventory	0	19	2,091	21	2,131	0.0	84.0	41.0	27.0	41.0	0.0	163.5	104.4	34.8	104.2
Annual Report Data					1,244					22.0					37.2

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	100	\$ 12,798.66	Commercial	10	Units 1,599	Disclosure 4,069	(b)(1) 0 26 USC 6103 129
Cases Collected	48	\$ 13,411.60	Media	0	Tax Periods 10,964	Other Functions 137	(b)(2) 3 5 USC 7114 0
Cases Outstanding	55	\$ 6,799.86	Ed. Inst.	0	Pages Reviewed 106,727		(b)(3) 135 18 USC 701 5
			Scientific	0	Released 91,980		(b)(4) 3 Rule 6(e) FR 1
			Government	0			(b)(5) 33 31 USC 5319 1
			Other	117			(b)(6) 31 26 USC 6105 2
Fee Waivers Req'd	1		Total	127			(b)(7) 2 41 USC 253b 0
Granted	0						(b)(7)(A) 34 Other 0
Denied	1						(b)(7)(B) 0
Partial	0						(b)(7)(C) 66
							(b)(7)(D) 1
							(b)(7)(E) 61
							(b)(7)(F) 1
							(b)(8) 0
							(b)(9) 0

Friday, June 8 2007

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	19	2,091	21	2,131	0.0	85.0	42.0	28.0	42.0	0.0	164.5	105.4	35.8	105.2
Receipts	1	21	1,531	24	1,577	—	—	—	—	—	—	—	—	—	—
Imperfects	0	0	283	5	288	0.0	0.0	9.0	41.0	10.0	0.0	0.0	18.0	31.8	18.1
Transfers	0	1	11	0	12	0.0	20.0	25.0	0.0	22.5	0.0	20.0	61.2	0.0	49.5
Grants	0	17	619	5	641	0.0	22.0	28.0	43.0	28.0	0.0	26.0	48.9	42.4	48.2
Partial Denials	1	5	231	3	240	7.0	92.0	74.0	46.0	74.5	7.0	82.8	112.4	57.0	110.6
Full Denials	0	1	18	0	19	0.0	380.0	35.5	0.0	51.0	0.0	380.0	91.5	0.0	96.5
No Records	0	2	266	3	271	0.0	253.0	23.0	4.0	23.0	0.0	253.0	38.6	11.7	39.8
Withdrawn	0	0	29	1	30	0.0	0.0	521.0	231.0	518.0	0.0	0.0	422.8	231.0	390.3
Closed prior to Init Detr	0	4	80	0	84	0.0	92.0	13.5	0.0	14.0	0.0	92.0	98.4	0.0	95.8
Total Closures	1	30	1,599	17	1,647	7.0	44.0	26.0	42.0	27.0	7.0	71.0	59.7	47.5	59.7
Ending Inventory	0	10	2,023	28	2,061	0.0	30.0	34.0	18.5	34.0	0.0	167.6	93.0	24.8	92.4
Annual Report Data					1,347					28.0					68.6

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	131	\$ 20,557.34	Commercial 13	Units 1,658	Disclosure 5,710	(b)(1) 0	26 USC 6103 196
Cases Collected	58	\$ 13,735.73	Media 0	Tax Periods 8,611	Other Functions 729	(b)(2) 10	5 USC 7114 0
Cases Outstanding	77	\$ 8,397.01	Ed. Inst. 3	Pages Reviewed 195,558		(b)(3) 203	18 USC 701 6
			Scientific 0	Released 156,460		(b)(4) 4	Rule 6(e) FR 1
			Government 0			(b)(5) 58	31 USC 5319 1
			Other 154			(b)(6) 54	26 USC 6105 0
Fee Waivers Req'd	0		Total 170			(b)(7) 4	41 USC 253b 1
Granted	0					(b)(7)(A) 52	Other 0
Denied	0					(b)(7)(B) 0	
Partial	0					(b)(7)(C) 95	
						(b)(7)(D) 6	
						(b)(7)(E) 94	
						(b)(7)(F) 1	
						(b)(8) 0	
						(b)(9) 0	



Tuesday, July 10 2007

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	10	2,024	27	2,061	0.0	31.0	35.0	21.0	35.0	0.0	168.6	94.0	26.4	93.4
Receipts	1	2	1,370	14	1,387	—	—	—	—	—	—	—	—	—	—
Imperfects	0	1	383	0	384	0.0	27.0	13.0	0.0	13.0	0.0	27.0	19.9	0.0	19.8
Transfers	0	0	16	0	16	0.0	0.0	2.5	0.0	2.5	0.0	0.0	25.4	0.0	21.4
Grants	0	2	569	15	586	0.0	13.5	27.0	28.0	28.0	0.0	13.5	43.5	32.1	43.0
Partial Denials	0	1	212	1	214	0.0	137.0	68.0	42.0	68.0	0.0	137.0	102.0	42.0	101.4
Full Denials	0	0	8	0	8	0.0	0.0	30.0	0.0	30.0	0.0	0.0	127.3	0.0	92.5
No Records	0	2	334	3	339	0.0	30.5	25.5	43.0	26.0	0.0	30.5	36.6	45.0	36.6
Withdrawn	0	1	17	0	18	0.0	53.0	58.0	0.0	55.5	0.0	53.0	108.9	0.0	95.2
Closed prior to Init Detr	0	0	76	1	77	0.0	0.0	38.0	22.0	36.0	0.0	0.0	49.0	22.0	47.4
Total Closures	1	7	1,704	20	1,732	15.0	27.0	26.0	30.0	26.0	15.0	43.6	44.0	34.1	43.8
Ending Inventory	0	5	1,690	21	1,716	0.0	296.0	38.0	18.0	38.0	0.0	269.3	103.8	33.5	103.4
Annual Report Data					1,332					28.0					51.0

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	106	\$ 20,695.13	Commercial	13	Units 1,789	Disclosure 4,936	(b)(1) 1 26 USC 6103 171
Cases Collected	50	\$ 13,964.33	Media	0	Tax Periods 11,185	Other Functions 185	(b)(2) 10 5 USC 7114 0
Cases Outstanding	61	\$ 7,580.80	Ed. Inst.	1	Pages Reviewed 287,794		(b)(3) 178 18 USC 701 4
			Scientific	0	Released 114,630		(b)(4) 3 Rule 6(e) FR 0
			Government	0			(b)(5) 37 31 USC 5319 4
			Other	121			(b)(6) 50 26 USC 6105 1
Fee Waivers Req'd	1		Total	135			(b)(7) 1 41 USC 253b 0
Granted	0						(b)(7)(A) 40 Other 0
Denied	1						(b)(7)(B) 1
Partial	0						(b)(7)(C) 83
							(b)(7)(D) 8
							(b)(7)(E) 91
							(b)(7)(F) 1
							(b)(8) 1
							(b)(9) 0

Wednesday, August 1 2007

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	5	1,686	21	1,712	0.0	297.0	39.0	19.0	39.0	0.0	324.2	105.0	34.5	104.7
Receipts	0	13	1,529	14	1,556	—	—	—	—	—	—	—	—	—	—
Imperfects	0	0	258	0	258	0.0	0.0	8.0	0.0	8.0	0.0	0.0	12.2	0.0	12.1
Transfers	0	0	19	0	19	0.0	0.0	26.0	0.0	26.0	0.0	0.0	38.0	0.0	32.8
Grants	0	9	558	20	587	0.0	2.0	28.0	31.5	28.0	0.0	2.6	40.4	37.7	39.7
Partial Denials	0	1	197	2	200	0.0	29.0	53.0	115.0	54.0	0.0	29.0	67.5	115.0	67.4
Full Denials	0	1	15	0	16	0.0	6.0	29.0	0.0	28.5	0.0	6.0	61.9	0.0	51.9
No Records	0	0	194	0	194	0.0	0.0	15.5	0.0	15.5	0.0	0.0	28.3	0.0	27.9
Withdrawn	0	0	24	0	24	0.0	0.0	56.0	0.0	56.0	0.0	0.0	170.5	0.0	151.5
Closed prior to Init Detr	0	1	95	1	97	0.0	8.0	13.0	30.0	13.0	0.0	8.0	56.0	30.0	54.7
Total Closures	0	12	1,406	23	1,441	0.0	3.0	23.0	34.0	23.0	0.0	5.5	40.0	44.1	39.8
Ending Inventory	0	6	1,809	12	1,827	0.0	209.0	34.0	12.5	34.0	0.0	258.0	96.8	19.9	96.8
Annual Report Data					1,164					28.0					45.9

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	104	\$ 13,278.53	Commercial	3	Units 1,507	(b)(1)	26 USC 6103 168
Cases Collected	24	\$ 4,498.00	Media	0	Tax Periods 7,915	(b)(2)	5 USC 7114 1
Cases Outstanding	82	\$ 8,980.93	Ed. Inst.	1	Pages Reviewed 121,318	(b)(3)	18 USC 701 5
			Scientific	0	Released 99,658	(b)(4)	Rule 6(e) FR 1
			Government	1		(b)(5)	31 USC 5319 8
			Other	148		(b)(6)	26 USC 6105 0
Fee Waivers Req'd	6		Total	153		(b)(7)	41 USC 253b 0
Granted	0					(b)(7)(A)	Other 0
Denied	6					(b)(7)(B)	
Partial	0					(b)(7)(C)	
						(b)(7)(D)	
						(b)(7)(E)	
						(b)(7)(F)	
						(b)(8)	
						(b)(9)	

Tuesday, September 4 2007

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
						MEDIAN					MEAN				
Beginning Inventory	0	6	1,795	12	1,813	0.0	210.0	35.0	13.5	35.0	0.0	302.0	98.0	20.8	98.1
Receipts	0	43	1,481	28	1,552	—	—	—	—	—	—	—	—	—	—
Imperfects	0	3	353	4	360	0.0	10.0	8.0	6.5	7.5	0.0	13.0	19.3	9.0	19.1
Transfers	0	0	22	0	22	0.0	0.0	10.5	0.0	10.5	0.0	0.0	63.2	0.0	55.6
Grants	0	17	661	12	690	0.0	16.0	24.0	24.0	24.0	0.0	17.8	38.8	23.7	38.0
Partial Denials	0	0	264	2	266	0.0	0.0	60.5	63.5	60.5	0.0	0.0	93.3	63.5	92.4
Full Denials	0	0	20	0	20	0.0	0.0	16.0	0.0	16.0	0.0	0.0	24.6	0.0	21.3
No Records	0	1	345	1	347	0.0	93.0	17.0	43.0	18.0	0.0	93.0	40.0	43.0	40.0
Withdrawn	0	2	10	0	12	0.0	10.5	79.5	0.0	67.5	0.0	10.5	193.0	0.0	139.4
Closed prior to Init Detr	0	1	97	2	100	0.0	9.0	14.0	15.0	14.0	0.0	9.0	62.1	15.0	60.1
Total Closures	0	24	1,838	21	1,883	0.0	11.5	21.0	23.0	21.0	0.0	19.3	44.5	24.8	44.0
Ending Inventory	0	25	1,438	19	1,482	0.0	24.0	29.5	8.0	28.5	0.0	89.2	99.6	10.7	98.2
Annual Report Data					1,501					24.0					49.6

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	126	\$ 17,903.60	Commercial 17	Units 1,911	Disclosure 6,529	(b)(1) 0	26 USC 6103 217
Cases Collected	41	\$ 6,111.40	Media 3	Tax Periods 10,919	Other Functions 231	(b)(2) 2	5 USC 7114 0
Cases Outstanding	85	\$ 12,654.60	Ed. Inst. 0	Pages Reviewed 190,618		(b)(3) 223	18 USC 701 3
			Scientific 0	Released 125,899		(b)(4) 4	Rule 6(e) FR 0
			Government 0			(b)(5) 52	31 USC 5319 4
			Other 150			(b)(6) 53	26 USC 6105 1
Fee Waivers Req'd	3		Total 170			(b)(7) 0	41 USC 253b 0
Granted	0					(b)(7)(A) 35	Other 0
Denied	3					(b)(7)(B) 0	
Partial	0					(b)(7)(C) 80	
						(b)(7)(D) 7	
						(b)(7)(E) 103	
						(b)(7)(F) 2	
						(b)(8) 0	
						(b)(9) 0	

Monday, October 1 2007

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	1	26	1,435	19	1,481	5.0	25.0	31.0	9.0	30.0	2.5	90.2	101.0	12.2	99.6
Receipts	0	19	1,646	24	1,689	—	—	—	—	—	—	—	—	—	—
Imperfects	0	0	314	3	317	0.0	0.0	9.5	14.0	10.0	0.0	0.0	15.3	16.3	15.2
Transfers	0	1	13	0	14	0.0	4.0	18.0	0.0	15.5	0.0	4.0	19.7	0.0	16.3
Grants	0	16	499	18	533	0.0	14.5	19.0	18.5	19.0	0.0	19.8	31.6	19.4	30.8
Partial Denials	0	4	211	2	217	0.0	32.0	55.0	25.0	52.0	0.0	35.0	102.3	25.0	99.9
Full Denials	1	1	12	0	14	29.0	29.0	27.0	0.0	28.5	29.0	29.0	48.8	0.0	42.9
No Records	0	1	248	3	252	0.0	29.0	21.0	10.0	21.0	0.0	29.0	46.1	13.0	45.5
Withdrawn	0	1	9	0	10	0.0	5.0	78.0	0.0	55.0	0.0	5.0	66.1	0.0	50.0
Closed prior to Init Detr	0	1	71	0	72	0.0	43.0	16.0	0.0	16.0	0.0	43.0	50.4	0.0	48.9
Total Closures	1	26	1,441	27	1,495	29.0	27.0	19.0	20.0	19.0	29.0	22.9	41.3	19.4	40.6
Ending Inventory	0	19	1,640	16	1,675	0.0	54.0	17.5	12.5	18.0	0.0	121.0	78.2	16.9	78.0
Annual Report Data					1,164					23.0					47.7

Fees	#	\$	Fee Category		Closed Cases		Hours Applied		Exemptions		(b)(3) Statutes	
Cases Billed	145	\$ 23,187.88	Commercial	25	Units	1,530	Disclosure	5,655	(b)(1)	0	26 USC 6103	174
			Media	1	Tax Periods	10,108	Other Functions	200	(b)(2)	8	5 USC 7114	0
Cases Collected	46	\$ 9,294.28	Ed. Inst.	7	Pages Reviewed	146,501			(b)(3)	180	18 USC 701	3
Cases Outstanding	102	\$ 14,233.80	Scientific	0	Released	118,614			(b)(4)	3	Rule 6(e) FR	2
			Government	1			(b)(5)	62	31 USC 5319	4		
			Other	146					(b)(6)	36	26 USC 6105	0
Fee Waivers Req'd	7		Total	180					(b)(7)	1	41 USC 253b	1
Granted	0								(b)(7)(A)	40	Other	0
Denied	5								(b)(7)(B)	0		
Partial	2								(b)(7)(C)	75		
									(b)(7)(D)	2		
									(b)(7)(E)	99		
								(b)(7)(F)	0			
									(b)(8)	0		
									(b)(9)	0		

Thursday, November 1 2007

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	19	1,634	18	1,671	0.0	55.0	18.0	14.0	18.0	0.0	128.4	79.2	38.6	79.2
Receipts	0	25	1,346	13	1,384	—	—	—	—	—	—	—	—	—	—
Imperfects	0	6	272	3	281	0.0	34.0	10.0	6.0	10.0	0.0	31.7	17.1	10.0	17.2
Transfers	0	3	9	0	12	0.0	6.0	22.0	0.0	16.0	0.0	8.7	30.4	0.0	21.4
Grants	0	24	509	11	544	0.0	13.5	24.0	24.0	24.0	0.0	19.4	28.7	28.3	28.2
Partial Denials	0	0	197	0	197	0.0	0.0	43.0	0.0	43.0	0.0	0.0	68.2	0.0	67.2
Full Denials	0	0	11	0	11	0.0	0.0	57.0	0.0	57.0	0.0	0.0	42.8	0.0	33.6
No Records	0	0	373	0	373	0.0	0.0	27.0	0.0	27.0	0.0	0.0	36.4	0.0	36.1
Withdrawn	0	2	16	0	18	0.0	112.0	30.0	0.0	30.0	0.0	112.0	54.3	0.0	54.7
Closed prior to Init Detr	0	1	119	0	120	0.0	15.0	24.0	0.0	24.0	0.0	15.0	23.5	0.0	23.0
Total Closures	0	36	1,561	15	1,612	0.0	15.0	24.0	21.0	24.0	0.0	25.6	33.0	23.3	32.7
Ending Inventory	0	8	1,419	16	1,443	0.0	14.0	29.0	24.5	29.0	0.0	212.3	89.0	49.1	89.3
Annual Report Data					1,319					25.0					36.0

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	116	\$ 25,673.84	Commercial	18	Units 1,602	Disclosure 5,931	(b)(1) 0 26 USC 6103 174
Cases Collected	58	\$ 14,172.28	Media	2	Tax Periods 7,958	Other Functions 873	(b)(2) 5 5 USC 7114 0
Cases Outstanding	62	\$ 12,742.64	Ed. Inst.	1	Pages Reviewed 155,031		(b)(3) 176 18 USC 701 2
			Scientific	0	Released 129,028		(b)(4) 3 Rule 6(e) FR 0
			Government	2			(b)(5) 43 31 USC 5319 1
			Other	125			(b)(6) 38 26 USC 6105 0
Fee Waivers Req'd	2		Total	148			(b)(7) 0 41 USC 253b 0
Granted	0						(b)(7)(A) 46 Other 0
Denied	2						(b)(7)(B) 0
Partial	0						(b)(7)(C) 68
							(b)(7)(D) 7
							(b)(7)(E) 80
							(b)(7)(F) 3
							(b)(8) 0
							(b)(9) 0

Thursday, January 24 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	1	8	1,406	15	1,430	14.0	15.0	30.0	34.0	30.0	7.0	239.9	90.7	56.2	91.1
Receipts	0	25	1,399	22	1,446	—	—	—	—	—	—	—	—	—	—
Imperfects	0	3	385	11	399	0.0	6.0	8.0	8.0	8.0	0.0	10.3	13.0	12.0	12.9
Transfers	1	1	14	1	17	28.0	3.0	19.0	25.0	19.0	28.0	3.0	20.4	25.0	20.1
Grants	0	12	426	11	449	0.0	14.0	22.0	41.0	22.0	0.0	13.3	30.0	43.1	29.8
Partial Denials	0	0	190	1	191	0.0	0.0	54.0	16.0	54.0	0.0	0.0	92.3	16.0	91.0
Full Denials	0	1	5	0	6	0.0	7.0	26.0	0.0	17.0	0.0	7.0	43.4	0.0	28.0
No Records	0	2	273	0	275	0.0	16.5	27.0	0.0	27.0	0.0	16.5	34.0	0.0	33.6
Withdrawn	0	3	14	0	17	0.0	11.0	26.0	0.0	21.0	0.0	8.0	89.1	0.0	66.9
Closed prior to Init Detr	0	0	84	2	86	0.0	0.0	7.0	11.0	7.0	0.0	0.0	25.1	11.0	24.2
Total Closures	1	22	1,436	26	1,485	28.0	10.5	20.0	15.5	19.0	28.0	11.7	34.2	25.7	33.7
Ending Inventory	0	11	1,369	11	1,391	0.0	9.0	25.0	17.0	25.0	0.0	183.4	88.7	60.1	89.2
Annual Report Data					1,069					25.0					41.6

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	119	\$ 13,501.00	Commercial 10	Units 1,538	Disclosure 5,074	(b)(1) 0	26 USC 6103 165
Cases Collected	80	\$ 10,272.00	Media 0	Tax Periods 8,246	Other Functions 791	(b)(2) 8	5 USC 7114 1
Cases Outstanding	48	\$ 6,258.40	Ed. Inst. 0	Pages Reviewed 112,490		(b)(3) 171	18 USC 701 4
			Scientific 0	Released 92,584		(b)(4) 0	Rule 6(e) FR 0
			Government 2			(b)(5) 40	31 USC 5319 3
			Other 141			(b)(6) 39	26 USC 6105 1
Fee Waivers Req'd	3		Total 153			(b)(7) 6	41 USC 253b 0
Granted	0					(b)(7)(A) 49	Other 0
Denied	3					(b)(7)(B) 0	
Partial	0					(b)(7)(C) 57	
						(b)(7)(D) 7	
						(b)(7)(E) 89	
						(b)(7)(F) 3	
						(b)(8) 0	
						(b)(9) 0	

Thursday, January 24 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
						MEDIAN					MEAN				
Beginning Inventory	0	11	1,369	11	1,391	0.0	10.0	26.0	18.0	26.0	0.0	184.4	89.7	61.0	90.2
Receipts	0	6	1,045	12	1,063	—	—	—	—	—	—	—	—	—	—
Imperfects	0	2	257	2	261	0.0	10.5	6.0	10.5	6.0	0.0	10.5	10.3	10.5	10.3
Transfers	0	1	7	0	8	0.0	15.0	12.0	0.0	13.0	0.0	15.0	13.0	0.0	10.6
Grants	0	5	351	7	363	0.0	2.0	20.0	20.0	20.0	0.0	6.6	24.8	33.9	24.7
Partial Denials	0	0	138	0	138	0.0	0.0	46.0	0.0	46.0	0.0	0.0	60.4	0.0	59.1
Full Denials	0	0	13	0	13	0.0	0.0	32.0	0.0	32.0	0.0	0.0	41.7	0.0	33.9
No Records	0	3	122	2	127	0.0	15.0	17.0	25.5	17.0	0.0	15.0	28.3	25.5	27.7
Withdrawn	0	0	9	0	9	0.0	0.0	28.0	0.0	28.0	0.0	0.0	25.7	0.0	19.3
Closed prior to Init Detr	0	0	230	0	230	0.0	0.0	11.5	0.0	11.5	0.0	0.0	23.2	0.0	22.9
Total Closures	0	12	1,169	11	1,192	0.0	14.5	15.0	14.0	15.0	0.0	10.3	25.5	28.1	25.3
Ending Inventory	0	5	1,245	12	1,262	0.0	480.0	32.0	27.0	32.0	0.0	416.8	103.3	59.2	104.1
Annual Report Data					923					21.0					29.7

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	82	\$ 11,812.00	Commercial	11	Units 1,201	Disclosure 3,516	(b)(1) 0 26 USC 6103 126
Cases Collected	50	\$ 9,083.80	Media	2	Tax Periods 7,002	Other Functions 201	(b)(2) 12 5 USC 7114 0
Cases Outstanding	35	\$ 2,818.80	Ed. Inst.	0	Pages Reviewed 133,566		(b)(3) 128 18 USC 701 0
			Scientific	0	Released 62,092		(b)(4) 0 Rule 6(e) FR 0
			Government	2			(b)(5) 34 31 USC 5319 3
			Other	90			(b)(6) 30 26 USC 6105 0
Fee Waivers Req'd	1		Total	105			(b)(7) 0 41 USC 253b 0
Granted	0						(b)(7)(A) 30 Other 0
Denied	1						(b)(7)(B) 0
Partial	0						(b)(7)(C) 45
							(b)(7)(D) 5
							(b)(7)(E) 48
							(b)(7)(F) 0
							(b)(8) 0
							(b)(9) 0

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	16	1,636	18	1,670	0.0	30.0	18.0	14.0	18.0	0.0	39.1	80.1	36.6	79.1
Receipts	6	231	14,503	142	14,882	—	—	—	—	—	—	—	—	—	—
Imperfects	0	40	3,509	42	3,591	0.0	12.0	8.0	7.0	8.0	0.0	22.9	13.5	10.1	13.6
Transfers	2	10	153	2	167	17.0	10.5	15.0	18.0	14.0	17.0	9.7	24.7	18.0	23.6
Grants	1	154	5,104	69	5,328	32.0	9.0	20.0	23.0	20.0	32.0	12.6	25.5	28.6	25.2
Partial Denials	1	6	2,237	6	2,250	161.0	12.5	40.0	22.0	40.0	161.0	25.2	68.4	25.5	68.2
Full Denials	0	2	120	0	122	0.0	10.0	27.5	0.0	27.0	0.0	10.0	38.4	0.0	37.3
No Records	1	10	2,268	19	2,298	2.0	14.0	19.0	14.0	19.0	2.0	22.8	26.5	16.3	26.4
Withdrawn	0	11	139	2	152	0.0	8.0	26.0	27.5	24.5	0.0	26.2	115.8	27.5	107.4
Closed prior to Init Detr	0	6	1,069	10	1,085	0.0	13.0	9.0	16.5	10.0	0.0	11.3	22.3	88.1	22.8
Total Closures	5	241	15,178	153	15,577	28.0	11.0	17.0	14.0	17.0	45.8	15.5	29.4	25.2	29.2
Ending Inventory	1	6	961	7	975	36.0	29.0	26.0	8.0	26.0	18.0	31.5	114.0	18.9	112.6
Annual Report Data					11,819					21.0					34.0

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	1,580	\$239,572.40	Commercial	174	Units 16,321	Disclosure 56,902	(b)(1) 0 26 USC 6103 1,950
Cases Collected	1,234	\$211,996.14	Media	26	Tax Periods 91,548	Other Functions 6,901	(b)(2) 79 5 USC 7114 2
Cases Outstanding	397	\$ 56,188.64	Ed. Inst.	19	Pages Reviewed 1,879,781		(b)(3) 2,008 18 USC 701 28
			Scientific	0	Released 1,449,927		(b)(4) 29 Rule 6(e) FR 15
			Government	15			(b)(5) 499 31 USC 5319 50
			Other	1,796			(b)(6) 487 26 USC 6105 5
Fee Waivers Reqd	56		Total	2,030			(b)(7) 11 41 USC 253b 2
Granted	2						(b)(7)(A) 477 Other 0
Denied	53						(b)(7)(B) 0
Partial	1						(b)(7)(C) 874
							(b)(7)(D) 64
							(b)(7)(E) 906
							(b)(7)(F) 7
							(b)(8) 0
							(b)(9) 0



Thursday, February 14 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	5	1,244	12	1,261	0.0	481.0	33.0	28.0	33.0	0.0	417.8	104.4	60.1	105.2
Receipts	0	25	1,273	14	1,312	—	—	—	—	—	—	—	—	—	—
Imperfects	0	6	389	1	396	0.0	7.5	7.0	15.0	7.0	0.0	68.7	12.6	15.0	13.5
Transfers	0	0	21	0	21	0.0	0.0	72.0	0.0	72.0	0.0	0.0	44.0	0.0	38.5
Grants	0	16	505	6	527	0.0	11.0	28.0	19.5	27.0	0.0	13.9	35.4	22.2	34.5
Partial Denials	0	0	214	0	214	0.0	0.0	62.0	0.0	62.0	0.0	0.0	76.8	0.0	75.8
Full Denials	0	0	16	0	16	0.0	0.0	56.0	0.0	56.0	0.0	0.0	53.9	0.0	45.4
No Records	0	0	180	6	186	0.0	0.0	21.0	19.0	21.0	0.0	0.0	31.3	21.2	30.6
Withdrawn	0	0	13	1	14	0.0	0.0	43.0	52.0	43.0	0.0	0.0	94.0	52.0	79.6
Closed prior to Init Detr	0	0	93	1	94	0.0	0.0	10.0	37.0	10.0	0.0	0.0	21.2	37.0	20.9
Total Closures	0	22	1,503	15	1,540	0.0	9.5	20.0	24.0	20.0	0.0	28.8	33.7	24.3	33.6
Ending Inventory	0	8	1,014	11	1,033	0.0	16.5	24.0	13.0	24.0	0.0	273.1	116.0	68.0	116.6
Annual Report Data					1,123					28.0					40.4

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	151	\$ 27,740.79	Commercial	10	Units 1,654	Disclosure 5,512	(b)(1) 0 26 USC 6103 193
Cases Collected	75	\$ 24,299.39	Media	1	Tax Periods 9,358	Other Functions 80	(b)(2) 6 5 USC 7114 0
Cases Outstanding	84	\$ 10,445.60	Ed. Inst.	0	Pages Reviewed 241,800		(b)(3) 201 18 USC 701 6
			Scientific	0	Released 187,898		(b)(4) 4 Rule 6(e) FR 3
			Government	1			(b)(5) 58 31 USC 5319 2
			Other	205			(b)(6) 40 26 USC 6105 0
Fee Waivers Req'd	12		Total	217			(b)(7) 1 41 USC 253b 0
Granted	1						(b)(7)(A) 42 Other 0
Denied	11						(b)(7)(B) 0
Partial	0						(b)(7)(C) 93
							(b)(7)(D) 11
							(b)(7)(E) 120
							(b)(7)(F) 0
							(b)(8) 0
							(b)(9) 0

Monday, March 31 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	7	1,014	11	1,032	0.0	21.0	25.0	14.0	25.0	0.0	312.6	116.9	68.9	117.6
Receipts	2	27	1,522	9	1,560	—	—	—	—	—	—	—	—	—	—
Imperfects	0	1	329	3	333	0.0	12.0	8.0	3.0	8.0	0.0	12.0	11.8	3.0	11.7
Transfers	1	1	13	1	16	6.0	12.0	16.0	11.0	11.5	6.0	12.0	31.6	11.0	27.5
Grants	0	7	441	4	452	0.0	8.0	19.0	36.5	19.0	0.0	12.0	26.0	49.3	25.9
Partial Denials	0	1	221	0	222	0.0	11.0	41.0	0.0	39.5	0.0	11.0	73.8	0.0	72.8
Full Denials	0	0	13	0	13	0.0	0.0	13.0	0.0	13.0	0.0	0.0	16.3	0.0	13.3
No Records	0	0	254	3	257	0.0	0.0	19.0	21.0	19.0	0.0	0.0	22.5	22.3	22.3
Withdrawn	0	0	6	0	6	0.0	0.0	16.0	0.0	16.0	0.0	0.0	125.8	0.0	83.9
Closed prior to Init Detr	0	0	83	1	84	0.0	0.0	7.0	76.0	7.0	0.0	0.0	30.6	76.0	30.4
Total Closures	1	10	1,418	12	1,441	6.0	11.5	17.0	21.0	17.0	6.0	11.9	29.5	30.0	29.4
Ending Inventory	1	24	1,118	8	1,151	16.0	2.5	16.0	10.0	16.0	8.0	102.5	99.0	77.0	98.7
Annual Report Data					1,092					20.0					34.8

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes					
Cases Billed	169	\$ 25,370.73	Commercial	11	Units	1,543	Disclosure	5,607	(b)(1)	0	26 USC 6103	189
			Media	2	Tax Periods	7,807	Other Functions	386	(b)(2)	10	5 USC 7114	0
Cases Collected	93	\$ 18,593.20	Ed. Inst.	3	Pages Reviewed	175,441			(b)(3)	198	18 USC 701	5
Cases Outstanding	79	\$ 7,131.13	Scientific	0	Released	140,954			(b)(4)	3	Rule 6(e) FR	1
			Government	2					(b)(5)	59	31 USC 5319	4
Fee Waivers Req'd	1		Other	187					(b)(6)	51	26 USC 6105	2
									(b)(7)	4	41 USC 253b	0
									(b)(7)(A)	50	Other	0
									(b)(7)(B)	0		
									(b)(7)(C)	98		
									(b)(7)(D)	6		
									(b)(7)(E)	94		
									(b)(7)(F)	0		
									(b)(8)	0		
									(b)(9)	0		
Granted	0											
Denied	1											
Partial	0											

## FOIA/PA Performance Measures

Tuesday, April 1 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	1	24	1,118	8	1,151	17.0	3.5	17.0	11.0	17.0	17.0	103.5	99.9	77.9	99.8
Receipts	0	19	1,242	17	1,278	—	—	—	—	—	—	—	—	—	—
Imperfects	0	9	328	5	342	0.0	12.0	8.5	3.0	9.0	0.0	12.0	14.8	3.0	14.5
Transfers	0	0	11	0	11	0.0	0.0	11.0	0.0	11.0	0.0	0.0	29.3	0.0	23.0
Grants	0	25	464	7	496	0.0	13.0	17.0	11.0	16.0	0.0	12.4	20.9	18.7	20.4
Partial Denials	0	1	182	0	183	0.0	14.0	28.0	0.0	28.0	0.0	14.0	73.3	0.0	72.2
Full Denials	0	0	13	0	13	0.0	0.0	23.0	0.0	23.0	0.0	0.0	25.5	0.0	20.8
No Records	0	0	197	4	201	0.0	0.0	14.0	6.5	14.0	0.0	0.0	18.0	7.3	17.6
Withdrawn	0	0	16	0	16	0.0	0.0	23.0	0.0	23.0	0.0	0.0	200.4	0.0	168.7
Closed prior to Init Detr	0	3	75	2	80	0.0	13.0	11.0	33.5	12.0	0.0	13.3	14.1	33.5	14.4
Total Closures	0	38	1,325	19	1,382	0.0	12.0	15.0	4.0	15.0	0.0	12.4	27.7	12.8	27.1
Ending Inventory	1	5	1,035	6	1,047	47.0	571.0	20.0	16.0	21.0	23.5	400.8	103.9	90.9	105.3
Annual Report Data					1,029					17.0					31.2

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	135	\$ 17,754.20	Commercial	22	Units 1,445	Disclosure 4,690	(b)(1) 0 26 USC 6103 151
Cases Collected	47	\$ 6,321.70	Media	2	Tax Periods 7,611	Other Functions 603	(b)(2) 9 5 USC 7114 1
Cases Outstanding	91	\$ 11,782.90	Ed. Inst.	0	Pages Reviewed 145,232		(b)(3) 158 18 USC 701 0
			Scientific	0	Released 102,982		(b)(4) 2 Rule 6(e) FR 2
			Government	2			(b)(5) 39 31 USC 5319 9
			Other	137			(b)(6) 48 26 USC 6105 0
Fee Waivers Req'd	2		Total	163			(b)(7) 0 41 USC 253b 0
Granted	0						(b)(7)(A) 35 Other 0
Denied	2						(b)(7)(B) 0
Partial	0						(b)(7)(C) 86
							(b)(7)(D) 1
							(b)(7)(E) 71
							(b)(7)(F) 0
							(b)(8) 0
							(b)(9) 0

## FOIA/PA Performance Measures

Wednesday, October 22 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	1	2	1,034	6	1,043	48.0	43.0	21.5	17.0	21.0	24.0	28.7	107.2	91.7	106.7
Receipts	0	14	1,177	13	1,204	—	—	—	—	—	—	—	—	—	—
Imperfects	0	1	232	2	235	0.0	4.0	10.0	33.0	10.0	0.0	4.0	13.1	33.0	13.2
Transfers	0	2	11	0	13	0.0	8.5	16.0	0.0	10.0	0.0	8.5	38.4	0.0	29.3
Grants	0	9	492	6	507	0.0	8.0	16.0	10.0	16.0	0.0	14.2	20.2	8.8	19.9
Partial Denials	0	0	199	1	200	0.0	0.0	28.0	7.0	27.5	0.0	0.0	51.4	7.0	50.7
Full Denials	0	0	5	0	5	0.0	0.0	29.0	0.0	29.0	0.0	0.0	23.4	0.0	14.6
No Records	0	0	147	1	148	0.0	0.0	13.0	2.0	12.5	0.0	0.0	19.9	2.0	19.5
Withdrawn	0	0	16	0	16	0.0	0.0	13.5	0.0	13.5	0.0	0.0	26.4	0.0	22.2
Closed prior to Init Detr	0	0	76	0	76	0.0	0.0	7.0	0.0	7.0	0.0	0.0	30.6	0.0	29.4
Total Closures	0	12	1,233	10	1,255	0.0	8.0	15.0	10.0	15.0	0.0	12.4	24.3	12.8	24.1
Ending Inventory	1	4	978	9	992	77.0	23.0	22.0	15.0	22.0	38.5	33.0	114.0	74.5	113.0
Annual Report Data					1,007					16.0					26.5

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	148	\$ 25,998.34	Commercial	18	Units 1,296	Disclosure 4,936	(b)(1) 0 26 USC 6103 173
Cases Collected	118	\$ 18,945.54	Media	1	Tax Periods 8,552	Other Functions 1,002	(b)(2) 4 5 USC 7114 0
Cases Outstanding	33	\$ 10,457.40	Ed. Inst.	0	Pages Reviewed 200,517		(b)(3) 176 18 USC 701 2
			Scientific	0	Released 172,942		(b)(4) 3 Rule 6(e) FR 0
			Government	1			(b)(5) 31 31 USC 5319 9
			Other	166			(b)(6) 44 26 USC 6105 0
Fee Waivers Reqd	5		Total	186			(b)(7) 0 41 USC 253b 0
Granted	0						(b)(7)(A) 35 Other 0
Denied	4						(b)(7)(B) 0
Partial	1						(b)(7)(C) 89
							(b)(7)(D) 1
							(b)(7)(E) 78
							(b)(7)(F) 0
							(b)(8) 0
							(b)(9) 0

Wednesday, October 22 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	1	4	978	9	992	78.0	24.0	23.0	16.0	23.0	39.0	33.8	115.0	75.4	114.0
Receipts	1	13	1,133	7	1,154	—	—	—	—	—	—	—	—	—	—
Imperfects	0	2	256	3	261	0.0	12.5	10.0	8.0	10.0	0.0	12.5	15.0	10.7	14.9
Transfers	0	0	12	0	12	0.0	0.0	14.0	0.0	14.0	0.0	0.0	15.7	0.0	12.5
Grants	0	11	387	6	404	0.0	5.0	17.0	33.0	17.0	0.0	9.1	23.4	34.2	23.1
Partial Denials	0	1	161	1	163	0.0	21.0	33.0	16.0	30.0	0.0	21.0	59.8	16.0	58.9
Full Denials	0	0	12	0	12	0.0	0.0	23.5	0.0	23.5	0.0	0.0	34.5	0.0	27.6
No Records	1	1	158	0	160	2.0	104.0	11.0	0.0	11.0	2.0	104.0	18.8	0.0	19.1
Withdrawn	0	0	11	0	11	0.0	0.0	28.0	0.0	28.0	0.0	0.0	37.2	0.0	29.2
Closed prior to Init Detr	0	0	76	2	78	0.0	0.0	7.0	8.5	7.0	0.0	0.0	18.6	8.5	17.9
Total Closures	1	15	1,111	12	1,139	2.0	5.0	15.0	15.5	15.0	2.0	16.7	25.6	22.5	25.4
Ending Inventory	1	2	1,000	4	1,007	108.0	2.5	24.0	29.5	24.0	54.0	1.7	114.7	132.8	114.4
Annual Report Data					866					17.0					28.7

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	129	\$ 14,236.30	Commercial	14	Units 1,206	Disclosure 4,227	(b)(1) 0 26 USC 6103 138
Cases Collected	113	\$ 13,822.50	Media	3	Tax Periods 7,285	Other Functions 330	(b)(2) 4 5 USC 7114 0
Cases Outstanding	19	\$ 1,061.80	Ed. Inst.	0	Pages Reviewed 106,999		(b)(3) 142 18 USC 701 0
			Scientific	0	Released 90,344		(b)(4) 2 Rule 6(e) FR 1
			Government	0			(b)(5) 37 31 USC 5319 2
			Other	135			(b)(6) 45 26 USC 6105 2
Fee Waivers Req'd	10		Total	152			(b)(7) 0 41 USC 253b 2
Granted	0						(b)(7)(A) 32 Other 0
Denied	10						(b)(7)(B) 0
Partial	0						(b)(7)(C) 67
							(b)(7)(D) 4
							(b)(7)(E) 51
							(b)(7)(F) 0
							(b)(8) 0
							(b)(9) 0

## FOIA/PA Performance Measures

Tuesday, July 1 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	1	2	1,001	4	1,008	109.0	3.5	25.0	30.5	25.0	109.0	2.3	115.7	167.0	115.6
Receipts	0	21	1,010	10	1,041	—	—	—	—	—	—	—	—	—	—
Imperfects	0	1	224	4	229	0.0	5.0	8.0	7.0	7.0	0.0	5.0	13.0	7.5	12.8
Transfers	0	0	12	0	12	0.0	0.0	20.5	0.0	20.5	0.0	0.0	17.4	0.0	13.9
Grants	0	8	403	1	412	0.0	7.5	22.0	28.0	22.0	0.0	8.5	24.0	28.0	23.6
Partial Denials	0	0	215	1	216	0.0	0.0	42.0	55.0	42.5	0.0	0.0	77.9	55.0	77.0
Full Denials	0	0	13	0	13	0.0	0.0	31.0	0.0	31.0	0.0	0.0	38.4	0.0	31.2
No Records	0	0	116	0	116	0.0	0.0	15.5	0.0	15.5	0.0	0.0	23.2	0.0	22.6
Withdrawn	0	2	14	0	16	0.0	4.5	25.5	0.0	24.5	0.0	4.5	104.4	0.0	81.7
Closed prior to Init Detr	0	0	53	0	53	0.0	0.0	12.0	0.0	12.0	0.0	0.0	22.8	0.0	21.6
Total Closures	0	12	1,094	6	1,112	0.0	7.5	19.0	9.5	18.0	0.0	8.7	32.9	18.8	32.6
Ending Inventory	1	11	917	8	937	138.0	7.0	21.0	11.5	21.0	69.0	8.8	117.7	78.4	115.8
Annual Report Data					871					22.0					37.9

Fees	#	\$	Fee Category		Closed Cases		Hours Applied		Exemptions		(b)(3) Statutes	
Cases Billed	134	\$ 19,247.00	Commercial	15	Units	1,224	Disclosure	4,707	(b)(1)	0	26 USC 6103	183
			Media	2	Tax Periods	7,532	Other Functions	653	(b)(2)	5	5 USC 7114	0
Cases Collected	42	\$ 12,188.20	Ed. Inst.	7	Pages Reviewed	167,195			(b)(3)	191	18 USC 701	2
Cases Outstanding	96	\$ 9,535.00	Scientific	0	Released	137,142			(b)(4)	5	Rule 6(e) FR	7
			Government	2			(b)(5)	45	31 USC 5319	4		
Fee Waivers Reqd	7		Other	142					(b)(6)	41	26 USC 6105	0
									(b)(7)	0	41 USC 253b	0
									(b)(7)(A)	56	Other	0
									(b)(7)(B)	0		
									(b)(7)(C)	80		
									(b)(7)(D)	4		
									(b)(7)(E)	75		
									(b)(7)(F)	0		
									(b)(8)	0		
									(b)(9)	0		
Granted	0		Total	168								
Denied	7											
Partial	0											

## FOIA/PA Performance Measures

Wednesday, October 22 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	2	11	914	6	933	78.5	8.0	24.5	9.5	22.0	52.3	12.9	119.0	96.3	117.3
Receipts	0	26	1,197	10	1,233	—	—	—	—	—	—	—	—	—	—
Imperfects	0	6	283	2	291	0.0	11.0	10.0	6.0	10.0	0.0	13.7	15.0	6.0	14.9
Transfers	0	0	18	0	18	0.0	0.0	11.5	0.0	11.5	0.0	0.0	16.9	0.0	14.5
Grants	1	22	342	6	371	32.0	9.0	18.0	14.0	17.0	32.0	10.1	22.5	17.2	21.7
Partial Denials	1	1	200	0	202	161.0	8.0	38.0	0.0	38.0	161.0	8.0	68.5	0.0	68.3
Full Denials	0	0	8	0	8	0.0	0.0	23.5	0.0	23.5	0.0	0.0	69.8	0.0	50.7
No Records	0	1	183	1	185	0.0	7.0	16.0	7.0	16.0	0.0	7.0	22.2	7.0	21.9
Withdrawn	0	3	8	1	12	0.0	8.0	9.5	3.0	8.0	0.0	10.0	106.5	3.0	68.1
Closed prior to Init Detr	0	1	66	2	69	0.0	2.0	8.0	331.0	8.0	0.0	2.0	12.5	331.0	21.3
Total Closures	2	34	1,144	13	1,193	96.5	8.5	16.0	7.0	15.0	96.5	10.3	28.6	60.7	28.6
Ending Inventory	0	3	967	3	973	0.0	20.0	17.0	13.0	17.0	0.0	33.7	109.8	9.5	109.0
Annual Report Data					884					19.0					33.3

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	135	\$ 20,591.60	Commercial	16	Units 1,205	Disclosure 4,462	(b)(1) 0 26 USC 6103 178
Cases Collected	106	\$ 19,861.20	Media	2	Tax Periods 7,256	Other Functions 1,114	(b)(2) 10 5 USC 7114 0
Cases Outstanding	32	\$ 5,773.90	Ed. Inst.	5	Pages Reviewed 146,859		(b)(3) 182 18 USC 701 3
			Scientific	0	Released 130,601		(b)(4) 4 Rule 6(e) FR 0
			Government	0			(b)(5) 40 31 USC 5319 4
			Other	161			(b)(6) 45 26 USC 6105 0
Fee Waivers Req'd	6		Total	184			(b)(7) 0 41 USC 253b 0
Granted	1						(b)(7)(A) 39 Other 0
Denied	5						(b)(7)(B) 0
Partial	0						(b)(7)(C) 71
							(b)(7)(D) 3
							(b)(7)(E) 82
							(b)(7)(F) 0
							(b)(8) 0
							(b)(9) 0

Wednesday, October 22 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	0	3	967	3	973	0.0	21.0	18.0	14.0	18.0	0.0	34.3	110.8	10.3	110.0
Receipts	1	9	950	7	967	—	—	—	—	—	—	—	—	—	—
Imperfections	0	0	197	1	198	0.0	0.0	7.0	3.0	7.0	0.0	0.0	13.0	3.0	12.9
Transfers	0	0	13	0	13	0.0	0.0	8.0	0.0	8.0	0.0	0.0	15.4	0.0	12.5
Grants	0	7	347	3	357	0.0	12.0	21.0	35.0	21.0	0.0	9.1	23.0	29.7	22.7
Partial Denials	0	2	149	0	151	0.0	48.5	31.0	0.0	31.0	0.0	48.5	59.2	0.0	58.3
Full Denials	0	0	8	0	8	0.0	0.0	30.5	0.0	30.5	0.0	0.0	32.3	0.0	23.5
No Records	0	0	108	0	108	0.0	0.0	15.0	0.0	15.0	0.0	0.0	25.6	0.0	24.9
Withdrawn	0	1	6	0	7	0.0	1.0	69.0	0.0	61.0	0.0	1.0	211.2	0.0	140.9
Closed prior to Init Detr	0	0	55	0	55	0.0	0.0	9.0	0.0	9.0	0.0	0.0	33.1	0.0	31.4
Total Closures	0	10	928	4	942	0.0	11.0	17.0	25.5	17.0	0.0	16.2	28.3	23.0	28.1
Ending Inventory	1	2	989	6	998	6.0	30.0	24.0	16.0	24.0	3.0	30.0	111.6	16.0	110.6
Annual Report Data					731					21.0					32.4

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	117	\$ 21,571.80	Commercial	14	Units 1,039	Disclosure 3,726	(b)(1) 0 26 USC 6103 132
Cases Collected	89	\$ 15,681.10	Media	5	Tax Periods 5,573	Other Functions 473	(b)(2) 3 5 USC 7114 0
Cases Outstanding	33	\$ 7,325.50	Ed. Inst.	0	Pages Reviewed 142,022		(b)(3) 135 18 USC 701 2
			Scientific	0	Released 84,570		(b)(4) 2 Rule 6(e) FR 0
			Government	0			(b)(5) 35 31 USC 5319 6
			Other	141			(b)(6) 31 26 USC 6105 0
Fee Waivers Req'd	4		Total	160			(b)(7) 0 41 USC 253b 0
Granted	0						(b)(7)(A) 33 Other 0
Denied	4						(b)(7)(B) 0
Partial	0						(b)(7)(C) 45
							(b)(7)(D) 5
							(b)(7)(E) 61
							(b)(7)(F) 1
							(b)(8) 0
							(b)(9) 0



## FOIA/PA Performance Measures

Wednesday, October 22 2008

	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total	(a)(1)	(a)(2)	(a)(3)	PA	Total
								MEDIAN					MEAN		
Beginning Inventory	1	2	989	6	998	7.0	31.0	25.0	17.0	25.0	7.0	31.0	112.6	17.0	111.7
Receipts	0	21	1,229	11	1,261	—	—	—	—	—	—	—	—	—	—
Imperfects	0	3	359	5	367	0.0	7.0	9.0	8.0	9.0	0.0	8.3	13.6	12.2	13.5
Transfers	0	2	12	0	14	0.0	12.0	8.5	0.0	10.0	0.0	12.0	12.1	0.0	10.6
Grants	0	7	436	1	444	0.0	3.0	20.0	14.0	20.0	0.0	9.9	24.7	14.0	24.3
Partial Denials	0	0	170	2	172	0.0	0.0	32.0	29.5	31.0	0.0	0.0	49.9	29.5	49.1
Full Denials	0	1	3	0	4	0.0	13.0	20.0	0.0	19.0	0.0	13.0	40.0	0.0	22.2
No Records	0	3	159	2	164	0.0	13.0	13.0	13.5	13.0	0.0	13.0	23.0	13.5	22.6
Withdrawn	0	0	9	0	9	0.0	0.0	30.0	0.0	30.0	0.0	0.0	458.8	0.0	344.1
Closed prior to Init Detr	0	1	60	0	61	0.0	11.0	10.0	0.0	10.0	0.0	11.0	13.1	0.0	12.7
Total Closures	0	17	1,257	10	1,284	0.0	13.0	16.0	12.5	16.0	0.0	10.6	26.8	16.1	26.5
Ending Inventory	1	6	961	7	975	36.0	29.0	26.0	8.0	26.0	18.0	31.5	114.0	18.9	112.6
Annual Report Data					903					20.0					32.0

Fees	#	\$	Fee Category	Closed Cases	Hours Applied	Exemptions	(b)(3) Statutes
Cases Billed	122	\$ 14,013.40	Commercial	12	1,367	(b)(1)	26 USC 6103
Cases Collected	73	\$ 11,081.90	Media	4	7,359	(b)(2)	5 USC 7114
Cases Outstanding	53	\$ 3,365.70	Ed. Inst.	2	149,177	(b)(3)	18 USC 701
			Scientific	0	121,052	(b)(4)	Rule 6(e) FR
			Government	1		(b)(5)	31 USC 5319
			Other	141		(b)(6)	26 USC 6105
			Total	160		(b)(7)	41 USC 253b
Fee Waivers Req'd	2					(b)(7)(A)	Other
Granted	0					(b)(7)(B)	
Denied	2					(b)(7)(C)	
Partial	0					(b)(7)(D)	
						(b)(7)(E)	
						(b)(7)(F)	
						(b)(8)	
						(b)(9)	