

CC-2001-034

July 11, 2001

Important Instructions on
Preparing Documents that will
be Released in Word
Subject: Processing Format
Upon Incorporation
Cancel Date: into the CCDM

Effectively immediately, we must take additional steps to ensure that all "hidden" codes are removed from the word processing files of documents that will be released to organizations outside the Department of the Treasury. Unless these codes, sometimes referred to as "metadata," are deleted, the recipient will be able to view changes (and in some cases, identify the author of a change) that have been made as documents progress from draft to final. In particular, these codes must be removed before documents are released to IRS' Communications Division for publication in the Internal Revenue Bulletin, e.g., Notices and Revenue Rulings, or release to outside sources, e.g., members of the press.

A. MICROSOFT WORD DOCUMENTS.

After a document has been approved and finalized, the official transmitting the file for release should take the following steps to "lock" the document and thus to prevent others from viewing the metadata:

1. In the main Microsoft Word Toolbar (top of page), select **Tools**
2. Select **TRACK CHANGES**
3. Select **ACCEPT OR REJECT CHANGES**
4. Select **ACCEPT ALL**
5. Select **CLOSE**

*Note: As a final precaution, to ensure that all hidden **VERSIONS** of a document are deleted follow the below steps:*

Filing Instructions: Binder Part (30) Master Sets: NO RO
NO: Circulate Distribute X to: All Personnel Attorneys In: all offices
RO: Circulate Distribute X to: All Personnel Attorneys In: all offices
Other National and Regional FOIA Reading Rooms
Electronic Filename: Word.pdf Original signed copy in: CC:F&M:PM:P

6. Select **FILE**
7. Select **VERSIONS...**
8. If **AUTOMATICALLY SAVE A VERSION ON CLOSE** is checked, remove check by right-clicking with mouse over check
9. **DELETE** all existing versions by selecting and clicking the **DELETE** button
10. **SAVE** document

B. COREL WORDPERFECT DOCUMENTS.

1. In the main Corel WordPerfect Toolbar (top of page), Select **FILE**
2. Select **DOCUMENT**
3. Select **REVIEW...**
4. Select **AUTHOR**
5. Press **TRIPLE CHECK MARK** button (pop-up caption: Insert all the annotations into the document.)
6. Press **CLOSE**
7. **SAVE** document

*Note: As a final precaution, to ensure that all **UNDO/REDO CODES** and edits cannot be viewed after the document is locked, follow the below steps:*

8. In the main Corel WordPerfect Toolbar (top of page), select **EDIT**
9. Select **UNDO/REDO HISTORY**
10. Select **OPTIONS**
11. If **SAVE UNDO/REDO ITEMS WITH DOCUMENT** is checked, remove check by left-clicking mouse over check
12. **SAVE** document

While we will continue to research this question, it is imperative that all Counsel employees who prepare documents for publication and distribution to the tax press or other media outlets immediately begin to follow the procedures outlined above before releasing word processing files from the Office of Chief Counsel.

If you need any further assistance, please contact Nadine Tyler-Burns in the Planning and Management Division by e-mail at nadine.tyler-burns@m1.irs.counsel.treas.gov or by telephoning 874-9433.

_____/s/_____
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