Information Return Intake System (IRIS)

Working Group Questions and Answers

December 13, 2023

Table of Contents

General Questions:

1. Will there be a recording that we can watch/slides to download later?

    Response: The deck will be posted on the IRIS working group meetings and notes web page: [IRIS working group meetings and notes](#). Working Group calls are not recorded.

2. The original link in the email to join the chat did not work was there a question answer session to obtain?

    Response: The Question and Answers (Q&As) will be posted on the IRIS working group meetings and notes web page: [IRIS working group meetings and notes.](#)

3. Why is there No upload for a form 1096? So I have to mail the 1096 separate?

    Answer: The 1096 is a paper transmittal for paper forms. When filed electronically, the 1096 is replaced by the transmission and submission information in the A2A. Do not mail a paper 1096 if you file electronically.

Registration Questions (TCC, API Client ID, JWK, etc.):

4. How do we obtain the User ID for User JWT token type? Is that made up by the transmitter, obtained from the IRS, or other?

    Response: User ID is covered in Pub. 5718 Section 3.1.2 A2A Consent. Follow the steps to get User ID, select org, consent to test and production environment, after you do both you can obtain User ID.

5. Is only ONE client ID allowed per TCC? We want to use a Test and a Prod that will be different.

    Response: The IRIS A2A Channel uses the API Client ID to authenticate and authorize access to IRIS A2A services. The API Client ID is assigned to the Organization, not the TCC.
    Please refer to Publication 5718.

6. Can the client ID be changed for a TCC?
    Once consent is given for a Client ID and the cert expires and you get a new Client ID, how do you change the consent to use a different client Id?

    Response: You can complete a new API Client ID application or modify your existing API Client ID application.

It is your responsibility to keep track of the JWK expiration date and provide a new one once the current JWK expires. The JWK expiration date is tied to the certificate expiration date. Please review Publication 5718.

IRIS Questions:

7. Is it 10 or 100 forms per CSV file?

   Response: ~~Only~~ 100 records are permitted per CSV file and ~~only~~ 1 file can be uploaded at a time. You may submit an unlimited number to templates.
   Note: Only CSV templates provided by the IRS can be used

8. When is the first date to send 1099 on IRIS?

   Response: IRIS opened January 10, 2024.

9. What is the ETA of the CSV be available again?

   Response: IRIS opened January 10, 2024, and CSV templates are now available.

10. Can an organization transmit forms with either A2A or CSV or are we limited to one method?

    Response: You may use either or both, but do not submit the same files through each method as this will case duplicate filing.
    1. Application to Application (A2A)
    Allows for bulk filing of Information Returns. Transmissions are sent directly from their application to the IRIS application. Please refer to Publication 5718.

    2. Taxpayer Portal / User Interface (UI)
    Allows small volume filers to file Information Returns directly to the IRS without the need for software. Issuers or transmitters manually enter data into the platform via user interface screens or upload data files to the platform to pre-populate the user interface screens using Comma-separated Values (CSV). Please refer to Publication 5717.

11. Not a developer—but a state revenue agency. Is there a contact email or contact person states can utilize for the IRIS transition? The irs.e-helpmail@irs.gov provided in a previous working group meeting seems to provide automated or scripted responses.

    Response: Please call the Help Desk Monday through Friday 7:30 a.m. – 7:00 p.m. ET. Listen to all menu options.
    Toll-free: 866-937-4130
    International: 470-769-5100

TTY/TDD: 866-937-4130
The IRS welcomes calls via your choice of relay.

ATS Testing:

12. Is there a hold up in the ATS review?

    Response: We are not aware of a delay on ATS reviews. If you are having a delay, please call the Help Desk Monday through Friday 7:30 a.m. – 7:00 p.m. ET.
    Listen to all menu options.
    Toll-free: 866-937-4130
    International: 470-769-5100
    TTY/TDD: 866-937-4130
    The IRS welcomes calls via your choice of relay.

13. Is there a limit to the number of payees that we can transmit in a test?

    Response: There is not a limit to the number of payees that may be submitted during ATS testing, however IRIS ATS is not intended for load testing. Reminder don't use live data in the test. Submitting more than the 5 scenarios with more than two records may delay the testing response.