



Information Returns Intake System (IRIS)

Working Group Meeting

Date: August 14, 2024





Agenda

- Welcome
- Updates
- TY24/PY25 IRIS ATS

Mics and Chat have been muted.

Deck will be posted to www.irs.gov/IRIS after the meeting.

During today's meeting we will open the chat to answer questions relating to the IRIS system only. Please keep your questions within the IRIS scope. If you have a question that refers to some of our other Information Return Filing options, you can find more information at www.irs.gov/filing/e-file-information-returns.

We will do our best to address IRIS questions as they are posted in the chat. We may not be able to provide a response to some IRIS questions during the meeting as research may be needed. If we do not get to your IRIS question today, we will post the answer to IRIS related WGM questions at www.irs.gov/e-file-providers/iris-working-group-meetings-and-notes.

Thank you for your participation and questions.



IRIS Updates

A decorative graphic at the bottom of the page consisting of several overlapping, wavy lines in shades of blue, dark blue, and red, creating a sense of movement and flow.



Known Issues and Solutions

IRIS Application to Application (A2A) Assurance Testing System (ATS) TY 2023 known issues and solutions

Description of the Problem	Solution(s)
IRIS A2A ATS is not returning test acknowledgements which includes the status when processing is complete.	A fix will be deployed on 8/18/2024. IRIS A2A ATS environment is unavailable until then.

You can check the IRIS ATS system availability at www.irs.gov/filing/e-file-information-returns



TY24 Schema Package

IRIS A2A Schema and Business Rule Secure Object Repository (SOR) drop dates are below. These dates are tentative and subject to change.

Forms	SOR Date
1097-BTC, 1098, 1098-C, 1098-E, 1098-F, 1098-Q, 1098-T, 1099-A, 1099-B, 1099-C, 1099-CAP, 1099-DIV, 1099-G, 1099-H, 1099-INT, 1099-K, 1099-LS, 1099-LTC, 1099-MISC, 1099-NEC, 1099-OID, 1099-PATR, 1099-Q, 1099-QA, 1099-R, 1099-S, 1099-SA, 1099-SB, 3921, 3922, 5498, 5498-ESA, 5498-SA, W-2G. 8809 – automatic 30-day extension of time to file certain information returns.	07/18/2024
1097-BTC, 1098, 1098-C, 1098-E, 1098-F, 1098-Q, 1098-T, 1099-A, 1099-B, 1099-C, 1099-CAP, 1099-DIV, 1099-G, 1099-H, 1099-INT, 1099-K, 1099-LS, 1099-LTC, 1099-MISC, 1099-NEC, 1099-OID, 1099-PATR, 1099-Q, 1099-QA, 1099-R, 1099-S, 1099-SA, 1099-SB, 3921, 3922, 5498, 5498-ESA, 5498-SA, W-2G. 8809 – automatic 30-day extension of time to file certain information returns.	08/29/2024
1097-BTC, 1098, 1098-C, 1098-E, 1098-F, 1098-Q, 1098-T, 1099-A, 1099-B, 1099-C, 1099-CAP, 1099-DIV, 1099-G, 1099-H, 1099-INT, 1099-K, 1099-LS, 1099-LTC, 1099-MISC, 1099-NEC, 1099-OID, 1099-PATR, 1099-Q, 1099-QA, 1099-R, 1099-S, 1099-SA, 1099-SB, 3921, 3922, 5498, 5498-ESA, 5498-SA, W-2G. 8809 – automatic 30-day extension of time to file certain information returns.	10/10/2024
1097-BTC, 1098, 1098-C, 1098-E, 1098-F, 1098-Q, 1098-T, 1099-A, 1099-B, 1099-C, 1099-CAP, 1099-DIV, 1099-G, 1099-H, 1099-INT, 1099-K, 1099-LS, 1099-LTC, 1099-MISC, 1099-NEC, 1099-OID, 1099-PATR, 1099-Q, 1099-QA, 1099-R, 1099-S, 1099-SA, 1099-SB, 3921, 3922, 5498, 5498-ESA, 5498-SA, W-2G. 8809 – automatic 30-day extension of time to file certain information returns.	11/12/2024



Schema Update

IRIS schema amounts have updated to report cents. The change should be included in the 8/29/2024 schema package.

From	To
USAmountType Type for a U.S. integer amount field	USDecimalAmountType Type for a U.S. amount field with dollars and cents
USAmountNNTType Type for a U.S. non-negative integer amount field	USDecimalAmountNNTType Type for a U.S. non-negative amount field with dollars and cents



**TY24/PY25
IRIS A2A ATS**





IRIS A2A ATS

IRIS Assurance Testing System (ATS) refers to the process used to test software and electronic transmissions prior to accepting forms into the IRIS A2A Production System.

- Software Developers must pass IRIS ATS for the tax year that the software package(s) will support.
- Transmitters must pass a one-time communication test.
- Software Developers/Transmitter are required to test every year.
- IRIS ATS for Tax Year (TY) 2024 is tentatively scheduled to begin in November.



IRIS A2A ATS Overview

- There will be 34 forms available to choose from.
- Examples will be provided for each form accepted through IRIS A2A intake method.
- IRIS ATS performs schema and business rules validation.
- IRIS ATS does not support stress or load testing.
- Response times in IRIS ATS do not mirror expected response times in production.
- IRIS ATS will not accept live taxpayer data.
- IRS downstream systems will not process test submissions.
- Always use your Transmitter Name and EIN from the IRIS TCC application in the Transmitter Group.
- All TINS must begin with three zeros.
 - Ex: 000-11-1111 or 00-0111111
- IRIS Schemas use “Issuer” to identify Payer/Filer and “Recipient” to identify Payee.



Software Developer ATS

- Use IRIS Transmitter Control Code (TCC) assigned to Software Developer role.
- Software Developers (SWD) will create files using their own test data.
 - Five submissions must be completed.
 - Each submission must include two unique recipients for a total of ten records.
 - If participating in CF/SF program at least one record should include this information.
 - If supporting corrections, a second transmission with one submission and one record is needed.
 - Use the 'UniqueRecordId' from one of the accepted submissions to submit a correction.
- Each submission must have a status of "Accepted" to pass ATS successfully
 - After confirming the "Accepted" status, the help desk will move from Test to Production status.



Transmitter ATS

- Use IRIS Transmitter Control Code (TCC) assigned to the Transmitter role.
- Transmitter will create a submission using their own test data.
 - One submission with one record must be completed.
- The submission must have a status of “Accepted” to pass ATS successfully
 - After confirming the “Accepted” status, the help desk will move from Test to Production status.



Passing ATS

- Each submission must have a status of “Accepted” to pass ATS successfully.
- Contact the Help Desk for a final review when all submissions have an “Accepted” status.
- When contacting the Help Desk have the following:
 - Receipt Id(s) to be reviewed
 - TCC
 - Software Id
 - Contact information including email address
- The Help Desk will assign an incident number which should be referenced for all your ATS review communications.
- Once the Software Developer passes IRIS ATS, the Software Package Status and Software ID Status will move from “Test” to “Production”.
- IRS will not send a notification.
 - To verify the status change, review your IRIS Application for TCC online.



Working Group Resources

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Resources

Publications

[Publication 5717](#) - Information Returns Intake System (IRIS) Taxpayer Portal User Guide

[Publication 5718](#) - Information Returns Intake System (IRIS) Electronic Filing Application to Application (A2A) Specifications

[Publication 5719](#) - Information Returns Intake System (IRIS) Test Package for Information Returns

Websites

www.irs.gov/inforeturn - a website that provides an overview of the three different intake channels (FIRE, AIR and IRIS)

www.irs.gov/iris - a website that provides general information about IRIS

www.irs.gov/irisats and www.irs.gov/irisschema - websites that provide information about Assurance Testing System (ATS) for the Application to Application (A2A) filer for IRIS



Known Issues and Solutions (KIS)

- Known issues and solutions provide notifications of problems identified, workarounds and solution dates for information returns filed through IRIS.
- A separate known issues and solutions file is available for both A2A and Taxpayer Portal.
- A link for Known Issues (KIS) has been added to www.irs.gov/IRIS.

IRIS known issues and solutions

Enrolled Agents

Annual Filing Season Program
Participants

Enrolled Retirement Plan Agents

Certified Professional Employer
Organization (CPEO)

Enrolled Actuaries

E-File Providers

Modernized e-File

Download files with temporary workaround solutions to known issues with the [Information Returns Intake System \(IRIS\)](#).

IRIS Taxpayer Portal and Application to Application (A2A) known issues and solutions are listed by tax year.

IRIS Taxpayer Portal known issues and solutions

Tax year	Current and resolved issues and solutions
2023	IRIS Taxpayer Portal TY 2023 known issues and solutions XLSX (Posted April 5, 2024)

IRIS A2A known issues and solutions

Tax year	Current and resolved issues and solutions
2023	IRIS A2A TY 2023 known issues and solutions XLSX (Posted April 5, 2024)

IRIS help

Get support with IRIS:

Help desk

Call Mon. – Fri. 7:30 a.m. – 7 p.m.
Eastern time.

- Toll-free: [866-937-4130](tel:866-937-4130)
- International: [470-769-5100](tel:470-769-5100)
- TTY/TDD: [866-937-4130](tel:866-937-4130). Use your choice of relay.

Working group meetings

[Find meetings and notes](#) for A2A developers, transmitters and state agencies.

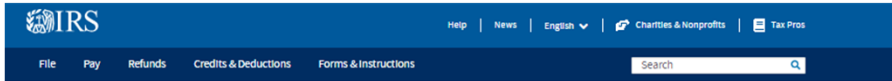
Known issues and solutions

[Get solutions to known issues with IRIS.](#)



IRIS Working Group

www.IRS.gov/IRIS



Home / File / E-file Forms 1099 with IRIS

E-file Forms 1099 with IRIS

- Individuals
- Businesses and Self-Employed
- Charities and Nonprofits
- International Taxpayers
- Governmental Liaisons
- Federal State Local Governments
- Indian Tribal Governments
- Tax Exempt Bonds

10 or more returns: E-filing now required

Starting tax year 2023, if you have 10 or more Information Returns, you must file them electronically. Find details on the [final e-file regulations](#).

You can e-file any Form 1099 for tax year 2022 and later with the information Returns Intake System (IRIS). The system also lets you file corrections and request automatic extensions for Forms 1099.

For system availability, [check IRIS status](#).

There are 2 ways to e-file with IRIS:

E-file through the IRIS Taxpayer Portal

This free, web-based filing system lets you:

- E-file up to 100 returns at a time
- Enter manually or by .csv upload
- Download payee copies to distribute
- Keep a record of completed, filed and distributed forms
- Save and manage issuer information

Get started

To use the IRIS Taxpayer Portal, you need an IRIS Transmitter Control Code (TCC). This 5-digit code identifies your business when you e-file forms. It can only be used for IRIS.

[Apply for an IRIS Taxpayer Portal TCC](#)

Sign in

If you have an IRIS TCC, [sign in to the IRIS Taxpayer Portal](#).

[IRIS Taxpayer Portal User Guide, Publication 5717](#) [PDF](#)

E-file with software through IRIS Application to Application (A2A)

If you have a third-party software or service or are developing software, you can use IRIS A2A to e-file thousands of returns (up to 100 MB at a time).

Steps to use IRIS A2A

To start using IRIS A2A with software or a third-party service, follow these steps:

- [Apply for an IRIS A2A Transmitter Control Code \(TCC\)](#)
- [Get an API Client ID](#)
- [Get a schema package](#)
- [Submit IRIS Assurance Testing System \(ATS\) transmissions](#)

After you successfully submit ATS transmissions, you can use IRIS A2A to transmit return data.

[IRIS E-Filing A2A Specifications, Publication 5718](#) [PDF](#)

Forms you can e-file

Publications

- [IRIS Taxpayer Portal User Guide, Publication 5717](#) [PDF](#)
- [IRIS Electronic Filing Application to Application \(A2A\) Specifications, Publication 5718](#) [PDF](#)
- [IRIS Test Package for Information Returns, Publication 5719](#) [PDF](#)

Email updates

Get updates on issues, changes and working group meetings about IRIS. [Subscribe to QuickAlerts](#) [C](#)

IRIS help

Get support with IRIS:

Help desk

Call Mon. – Fri. 7:30 a.m. – 7:00 p.m. ET.

- Toll-free: [866-937-4130](#)
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Working group meetings

[Find meetings and notes](#) for A2A developers, transmitters and state agencies.

Related

- [Video: How to Use the IRIS Portal](#) [C](#)
- [Guide to Information Returns](#)
- [General Instructions for Certain Information Returns](#)

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IRIS A2A to transmit

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Questions

