



Information Returns Intake System (IRIS)

Working Group Meeting

Date: November 08, 2023





Agenda

- Welcome
- Updates
- ATS Process
- API Client ID
- IT Support
- Available Resources



Updates

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Working Group Updates

- IRIS Working Group calls are scheduled for the second Wednesday of each month
- QuickAlerts will be sent and will include meeting information and link
 - You can subscribe to IRIS Quick Alerts for notification related to IRIS
 - www.irs.gov/e-file-providers/subscribe-to-quickalerts
- Meeting materials and Questions & Answers will be posted irs.gov/iris
 - www.irs.gov/e-file-providers/iris-working-group-meetings-and-notes
- Schema Package distributed to SOR
 - November drop will be next week
 - 10/12/2023
 - 09/11/2023
- Tutorial for IRIS TCC application is now available at irs.gov



IRIS ATS Updates for TY2023/PY2024





Assurance Testing System

IRIS ATS has a tentative start date in November.

- There are twenty criteria-based scenarios to choose from.
- You are required to submit and pass five scenarios in ATS before you may transmit to Production.
 - You may choose any five of the 20 scenarios.
 - Each scenario must include two unique recipients for a total of ten records.
- If your application was marked for CF/SF program at least one scenario should include this information.
- If you are filing corrections, a second transmission with one submission and one record is needed.
 - Use the 'UniqueRecordId' from one of the accepted scenarios to submit a correction.
- For an expedited review process, please submit one transmission with only five submissions.
- Scenarios are located at www.irs.gov/IRISATS



Assurance Testing System(cont.)

- 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.
- IRIS ATS does not support stress or load testing.
- Refer to Publication 5719, Information Returns Intake System (IRIS) Test Package for Information Returns, for more details.



Passing ATS

- Each scenario must have a status of “Accepted” to pass ATS successfully.
- Contact the Help Desk for a final review when all scenarios 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”.
- The IRS will not send a notification.
 - To verify the status change, review your IRIS Application for TCC online.



API Client ID





API Client ID

- The IRIS A2A Channel uses the API Client ID to authenticate and authorize access to IRIS A2A services.

- You can use your existing Client ID, if you already have one.
 - Go to the 'Application Details' page on your existing API Client ID Application.
 - Select the edit icon.
 - Check the 'IRIS' box under 'Select APIs'.
 - Resubmit your application.

- Anyone submitting through IRIS A2A must have an API Client ID.
 - Software Developers
 - Transmitters
 - Issuers



API Client ID Application

- Access your e-Services application page.
- Select Organization page: Choose **individual**.

An official website of the United States Government



Select Your Organization

Select the organization you will represent in this session. Each item below represents an organization for which you are authorized to perform work. By selecting an organization, you are logging in as an authorized user of that organization and will be able to perform work for only that organization. You may represent yourself by selecting Individual. You may filter organizations to narrow down the choices based on matching text.

Individual

Select "Individual" to represent yourself as an individual. No organization-specific authorizations will be granted.

Individual

Organization Roles

Select an Organization to represent a specific role for your organization's location.

Filter Organizations

Filter by business name, address, or application type

Show 10 entries

Selection	Organization	Application Type
Select	[REDACTED]	IRIS TCC

Showing 1 to 1 of 1 entries

Previous 1 Next





New Application

Choose 'New Application' drop down and select 'API Client ID Application'.

- e-services
- Online Tutorials
- Mailbox
- Modify PIN
- Profile
- Contact Us

External Services Authorization Management

Welcome to the External Services Authorization Management Web Application. Please select an existing application or create a new application. The application will ask you for information regarding your Firm/Organization and personal information of the users on the application.

New Application

You will have the opportunity to save your application if you do not have all the required information. Once the application is saved, you may come back and revise the application at your convenience. When all of the information is entered, you will be allowed to submit the application for review by the Internal Revenue Service. The IRS will process your application and send you a notification of the application status.

NEW APPLICATION ▼

All Applications

Showing Items 1 to 1 of 1

Doing Business As (Trade/Company Name) ▼	Last Update ▼	Application Status ▼	Tracking M
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- ACA Application for TCC (Forms 1094/1095-B and/or 1094/1095-C)
- API Client ID Application
- e-File Application
- IR Application for TCC (Filing Information Returns Electronically (FIRE))
- IRIS Application for TCC (Information Return Intake System (IRIS))
- PBBA Application for TCC (Audited Partnership and Partners)
- TIN Match Application



Firm Information

What Tax ID does this firm operate under*

EIN SSN

Employer Identification Number (EIN)*

 -

What legal name does this firm operate under*

Firm/Organization Name Person Name

Firm/Organization Legal Name*

Doing Business As (Trade/Company Name)

Business Phone

Phone Country Code*

Phone Number*

Business Address (Physical Location)

Country*

Address Line 1*

Address Line 2

Address Line 3

City*

Province/State/U. S. Territory*

Postal Code*

Mailing Address

Is your mailing address different from your business address

Yes No



PREVIOUS

SAVE

CONTINUE





Application Details

API Label	Client ID	API Selected	Integration Type	Redirect URL	Status	View	Edit	Delete
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No records found.

Showing Items 0 to 0 of 0

<<Prev Page 1 Next>>

NEW API CLIENT ID

< PREVIOUS

CONTINUE >

Cancel

Select the "NEW API CLIENT ID" button.



Add API Client Info

The following fields are required in your JWK: **kid, kty, use, n, e, x5t, x5c**.
The **"kty"** field should be equal to **"RSA"**.

Select the "Save" button to store the entered application details.

Required fields are marked with an asterisk (*) and must be completed to submit the form.

API Label:* **1**

Select API:
 SOR TDS TINM FBP IRIS **2**

API Status:*
Active **3**

Select Provider Type: **4**
 A2A ISP

JSON Web Key (JWK):*
 5



API Client Info

1	API Label	Self defined
2	Select API	Check "IRIS"
3	API Status	Active
4	Provider Type	IRIS can only be "A2A"
5	Json Web Key (JWK)	<p>JWK attributes can only include the following in this order:</p> <ul style="list-style-type: none">• "kty": Key Type (must be RSA)• "kid": Key ID• "use": "sig" Public Key Use• "n": the modulus• "e": "AQAB" the public exponent• "x5c": X. 509 Certificate Chain• "x5t": X.509 Certificate SHA-1 Thumbprint <p>Remove any other attribute names added by your JWK tool that are not in this list.</p>

Should contain X.509 certificate using both "x5t" (X.509 SHA-1 Thumbprint) and "x5c" (X.509 certificate Chain) parameters.

- You are not allowed to use self-signed certificates.
- You can use the same public certificate as used for other IRS programs such as MeF or AIR.



IT Technical Support

Subject Matter Experts (SMEs)



Questions



Chat is now open for questions.

Help desk

Contact 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



Resources

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IRIS 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 Scenarios (ATS) for the Application to Application (A2A) filer for IRIS

www.irs.gov/iristcc - website to access the Application for Transmitter Control Code (TCC) and the API Client ID Application.



Communications

Known Issues

You may encounter unexpected issues when filing through IRIS.

Until corrections can be implemented, IRIS may develop “workarounds” which are temporary changes to allow the return to be transmitted electronically

Workarounds will be posted by Tax Year (TY) and linked to the Schema and Business Rules page under the “Known Issues”.

QuickAlerts

QuickAlerts sends messages, within seconds, to keep Tax Professionals up to date on the events that affect Issuers/Payers, Transmitters and Software Developers who electronically file IRIS information returns.

By signing up for the IRIS Quick Alerts subscription, you will receive important messages about electronic specifications, publications and system information needed to file using IRIS.

You can sign-up for IRIS Quick Alerts by visiting the link at [Subscribe To Quick Alerts | Internal Revenue Service \(irs.gov\)](#).
