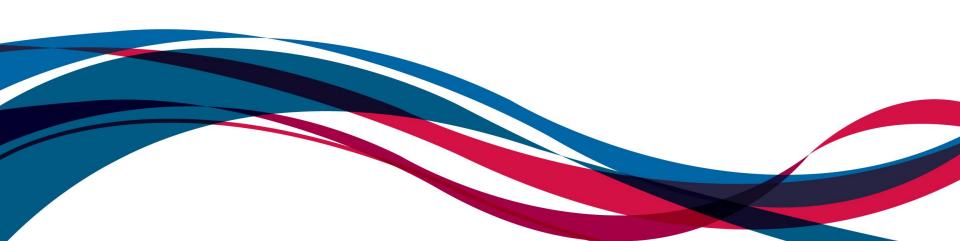# Information Returns Intake System (IRIS)
Working Group Meeting
Date: November 08, 2023
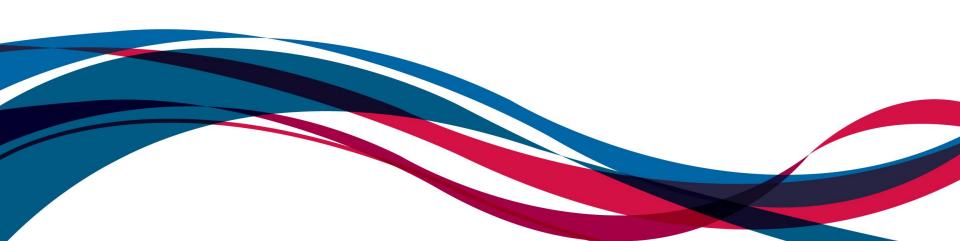
Agenda

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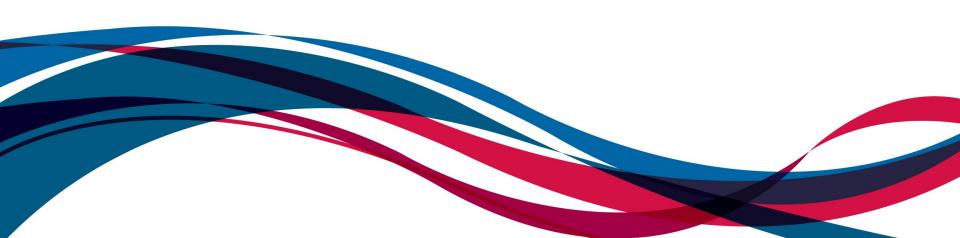 - ➤ IT Support
  - ➤ Available Resources

Updates

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.
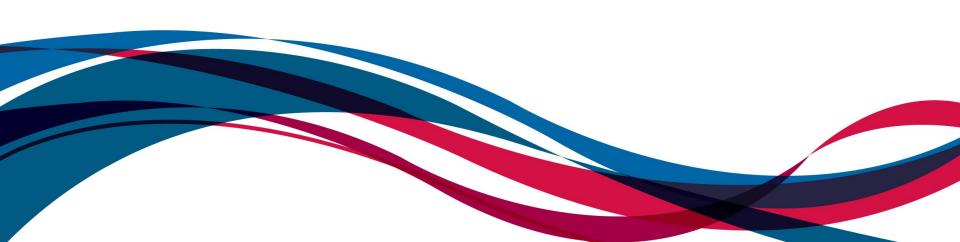
Passing ATS

➢ 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.
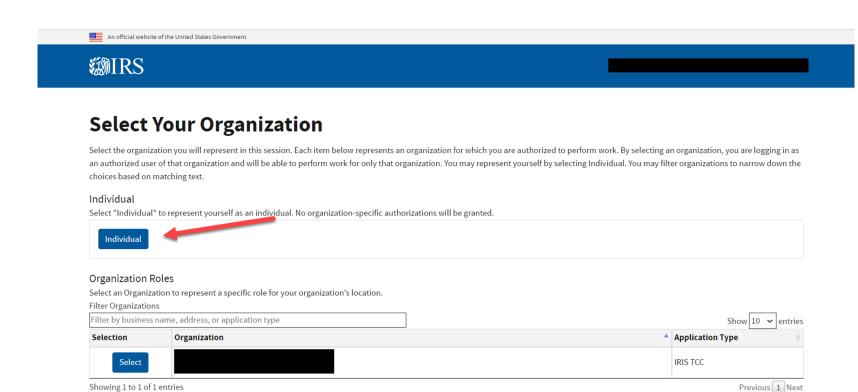 ➢ To verify the status change, review your IRIS Application for TCC online.

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.**
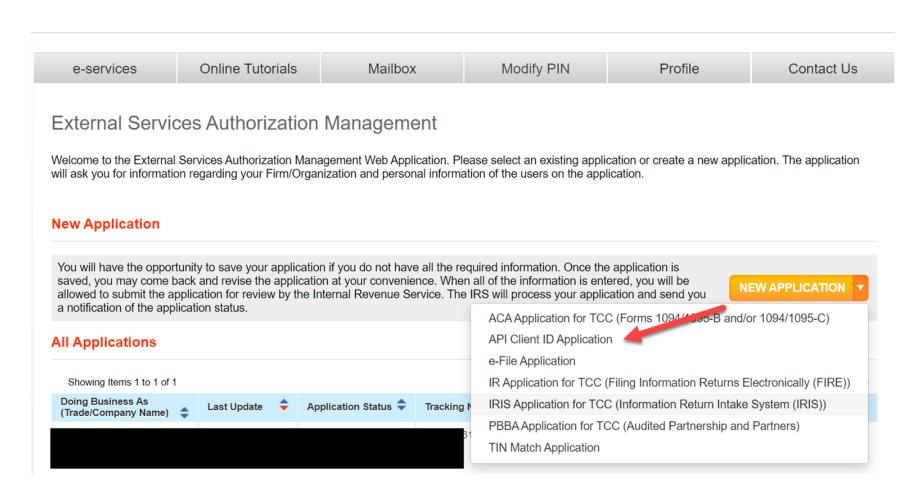- Select Organization page: Choose **individual**.

New Application

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

[001-United States/Canada ▼]

Phone Number*

[_____]

Business Address (Physical Location)

Country*

[United States ▼]

Address Line 1*

[_____]

Address Line 2

[_____]

Address Line 3

[_____]

City*

[_____]

Province/State/U.S. Territory*

[Select ▼]

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
			No records found.					

Showing Items 0 to 0 of 0   «Prev Page 1 ▼ Next»»

NEW API CLIENT ID

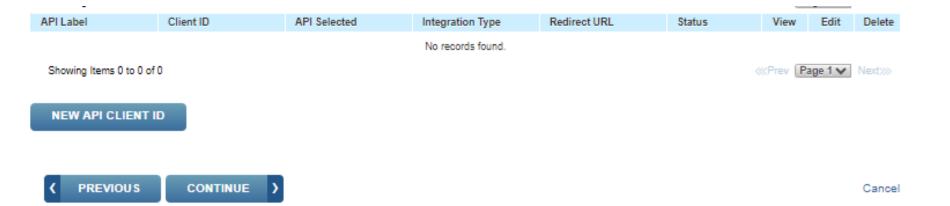‹ **PREVIOUS**   **CONTINUE** ›   Cancel

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

SAVE ❯   Cancel

API Client Info

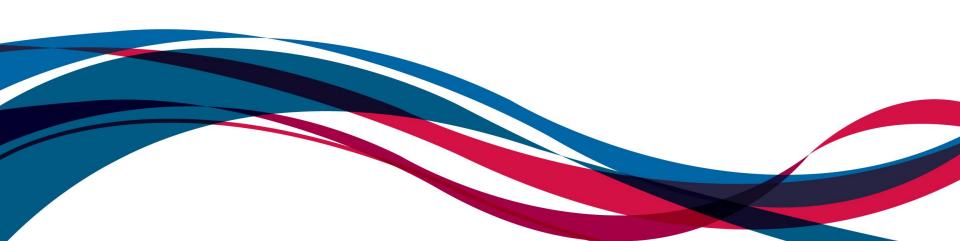| 1	API Label	Self defined
2	Select API	Check "IRIS"
3	API Status	Active
4	Provider Type	IRIS can only be "A2A"
5	Json Web Key (JWK)	JWK attributes can only include the following in this order: • "kty": Key Type (must be RSA) • "kid": Key ID • "use": "sig" Public Key Use • "n": the modulus • "e": "AQAB" the public exponent • "x5c": X. 509 Certificate Chain • "x5t": X.509 Certificate SHA-1 Thumbprint Remove any other attribute names added by your JWK tool that are not in this list.

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)
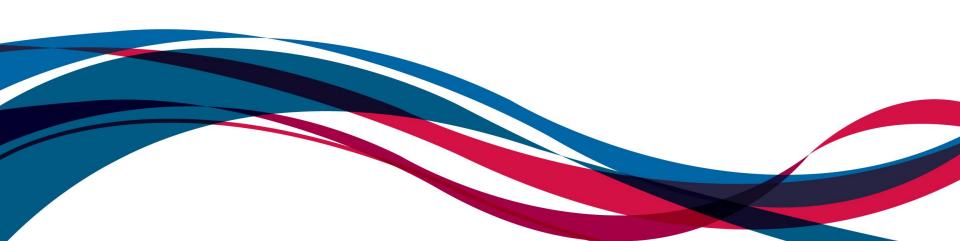
Questions

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

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).