



Information Returns Intake System (IRIS)

Working Group Meeting

Date: March 12, 2025





Agenda

- Welcome
- Filing Season Update
- Known Issues
- Tips
- Resources

Mics and Chat have been muted.

The PowerPoint 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.



TY2024/PY2025

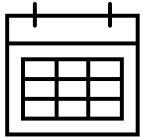
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IRIS Filing Season Update

Since the opening of Filing Season 25 (FS25) on January 10th, IRIS has received over 24 million records compared to 11.6 million last year during this same period.

- A2A: Over 22 Million records
- Taxpayer Portal: Over 2.3 Million records



Electronic Filing Due Date for 1099 Series is **03/31/2025**

- 1099-QA due date was 2/28/2025 with no automatic extension
- 1099-NEC electronic filing due date was 01/31/2025

Highest Volume Forms:

- 1099-NEC
- 1099-R

IRIS has surpassed the total number of forms received last year from January-December

- TY23/PY24: 12.4 million



Known Issues

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Known Issues and Solutions

IRIS A2A ATS				
Date entered	Form Type	Issue Type	Description of the Problem	Solution(s)
3/4/2025	All Forms	ATS Review	Any test transmissions prior to Feb. 07, 2025, are not reviewable by the e-Help desk. If test transmissions were sent prior to this date, they cannot be used to either pass a software developer from "Test" to "Production or a communication test.	Work around: Resubmit your test transmission/communication test to be reviewed and/or passed.

Taxpayer Portal				
Date entered	Form Type	Issue Type	Description of the Problem	Solution(s)
1/24/2025	1098-F	Data entry	Box 9, Code, is required when it should be optional.	Work around: Use Code E if no applicable code. Will be fixed for TY2025.
3/5/2025	All Forms	Replacement	Rule TMFST013 - Original receipt ID matches a receipt ID from a transmission that has already been successfully replaced. Issue: Some replacement transmissions are being rejected when no replacement has been filed.	Programming will be updated. Estimated date of fix is mid march.



Registration Questions

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Registration Questions **FIRE/ACA**

Question:	Response:
When will FIRE be retired?	We do not have a date when FIRE will retire. Information will be shared once a date is known.
What will happen to FIRE filing history when it shuts down? What will happen to ACA filing history when it transitions?	We do not have any information to provide on FIRE and ACA filing history when they retire. We will provide information when it becomes available.



Registration Questions **TCC Application**

Question:	Response:
How do I sign up?	You will need to apply for an IRIS TCC before you can electronically file through IRIS. The application process is usually completed within 24 hours but could take up to 45 days. You can check your application to see if a TCC has been assigned generally within 24 hours. Please refer to Publication 5903, IRIS App for TCC Tutorial, for information on how to complete an IRIS application for TCC.
How do I add another user to the IRIS system as a backup person? I can find no instructions as to how to do this.	Refer to Publication 5903, IRIS App for TCC Tutorial, for completing or modifying an IRIS Application for TCC. You will need to select the application's Authorized Users tab to add or remove authorized users.
We can only see our IRIS application sporadically. We have other e-services applications, and it is challenging to move between applications.	Click the e-services tab on the Menu Bar to return to the External Services Authorization Management (ESAM) landing page to access other applications.
Clarity for me and my clients. We still have issues with clients getting their TCC into production mode. Sometimes a simple communication test works and sometimes it doesn't.	<p>Software Developers must successfully transmit and receive an Accepted Status for the software to be used in the IRIS Production System. The ability of a Software Developer to communicate is part of their IRIS ATS testing; no separate communication test is required for a Software Developer.</p> <ul style="list-style-type: none">• Five submissions with each submission including two records (10 records total). <p>Transmitters must complete a communication test for IRIS.</p> <ul style="list-style-type: none">• The communication test is completed by creating a file with 1 transmission and 1 submission that includes 2 records. <p>Software Developers, who are also Transmitters, are not required to perform a separate communication test.</p>
Stuck on getting API key and the part to validate JSON web key I'd like help with this issue.	Detailed information is provided in the October 09, 2024, and November 08, 2023, Working Group Power Points.



Registration Questions **CSV**

Question:

Response:

How do you create the import template? Where can you find formatting information?

CSV File templates can be found on the IRIS Dashboard under "Upload CSV with Form Data". After selecting the icon, you can download each CSV template with the headers for the forms you need to file. You can enter up to 100 lines per template. You may upload as many templates as needed.

The CSV File Formatting Guidelines provide a list of allowable characters for each field and are available on the Taxpayer Portal. To find the Formatting Guidelines: in the Taxpayer Portal, click 'Upload CSV with Form Data', then on the right side of the next page under FAQ, #8 has the Template Formatting Guidelines. You may download the Formatting Guidelines for each form.

Tips for troubleshooting CSV errors are provided in Publication 5717- Information Returns Intake System (IRIS) Taxpayer Portal User Guide (Rev. 9-2024).

Templates and easier tracking and search methods.

The business will need to determine the best record keeping works for you. You may want to create a spreadsheet to list the receipt IDs, the issuer, recipients and related receipts IDs, such as corrections and replacements.

Common errors, corrections workflow for rejections after accepted file.

We need more information to know what common errors you are referencing, such as business rules, CSV Template errors, etc. If a transmission is rejected, it should be refiled as a replacement. When you select the receipt ID to correct and then select the correct/replacement button on the bottom, the system identifies that you are making a replacement for the rejected original transmission. Replacements provide a 60-day grace period to correct the errors and refile without penalty for late filing.

Coming from using AIR for almost a decade, work is similar but distinct.



Registration Questions **CSV cont.**

Question:

Response:

For 1099 NEC--we have column headings set up exactly as designated, but we get an error every time we load our .csv file that they do not match the required headings. If we re-download the IRS template and copy and paste our data into it, that works.

We recommend you download a copy of the CSV templates from the Taxpayer Portal and verify that the template headers you are using match exactly. This includes spaces, commas and spelling. The user also may not be importing it as a CSV file. Publication 5717 has a CSV section and some of the Working Group decks have detailed information.

Can the form templates be posted prior to IRIS opening so we can get the data ready earlier?

The end of the year shutdown is when IT makes the Tax Year crossover. This includes updates to the CSV templates. At this time, they will not be available until the Filing Season opens.

We understand the request to make the CSV templates available sooner and are reviewing the request.

I have 1 question for this year. The AL entry slot (Box 1 - Date of closing) will not allow a 2-place entry if the month starts with a 0.

Date of closing must be in MM/DD/YYYY date format.

Reference FAQ #10: If you are using spreadsheet software to view and edit the CSV template, double check that date fields are formatted in MM/DD/YYYY format. Spreadsheet software will often format dates in unallowable formats..



Registration questions **Portal**

Question:	Response:
Is there a way to download all submitted 1099s for a specific company in one compiled pdf?	IRIS downloads all forms in a transmission in one zip file. The zip file contains a separate PDF for each recipient.
Can we see the name of the recipient on the main listing of submitted forms? Or easiest way to search for a recipient's form.	Recipient names are not displayed on the dashboard of the 'Submitted' and 'Unsubmitted Forms' icons. Receipt IDs may contain several issuers and/or recipients. The easiest way to search for a recipient form is to enter the recipient's name in the search box at the top of each page.
Is there an easier way to get at the filed 1099s instead of requesting them and waiting for the download to be ready? Also need to make the system available much sooner than it was this year and work better while in operation.	Filers must download the forms to get copies of the forms filed in each submission. IRIS opening date is available as soon as possible each year. IRIS opened on January 10 the prior two years.
Number of issuers allowed.	More information is needed to answer the question. The Issuer Management tile located in the Taxpayer Portal allows users to securely save issuer information that can be easily accessed as you create each form. The information stored here will be available from year to year. You can save information for up to 25 frequently used Issuers
It would be helpful if we could enter Vendors and be able to select them the next year. Each year they are duplicate vendors from previous years.	At this time, the Taxpayer Portal does not allow for Recipient/Payee/Vendor information to be "saved". This may be a future function.
When will IRIS enlist masked TINs on 1099s for recipients to protect PII information. What is the proposed work around if that is not in the development plans?	At the time, the Taxpayer Portal does not support the truncation/masking of recipient TINs.



Registration Questions **Corrections**

Question:

Response:

How do you file a corrected 1099?

The correction process was covered in detail in the February 2024 PowerPoint. Correction instructions are explained in Publication 5717 for information returns transmitted through the Taxpayer Portal and Publication 5718 - Information Returns Intake System (IRIS) Electronic Filing Application to Application (A2A) Specifications for information returns transmitted through Application to Application (A2A). Please call the Help Desk if you have a specific question about Corrections.

How do you correct an "Accepted with Errors" status?

The Status "Accepted with Errors" means that the IRS has completed processing the file and has found error(s). Records accepted with errors are considered accepted by the IRS. However, every effort should be made to provide a correct information return by filing Corrections for these errors.

To find the form(s) with the error(s) for information returns transmitted through the Taxpayer Portal follow the steps below:

1. Go to the View Submitted Forms Tile, find the receipt ID that has the Transmission Status of "Accepted with errors".
2. Click on the status "Accepted with errors".
3. On the next page it shows the Error level, ID, Submission Status, Error Code and Error Description.
 - a. Write down the ID number(s) of the forms with the errors.
4. Select the back button.
5. Find receipt ID again, and click on the receipt ID.
6. The next page will show a list of all forms in the receipt ID.
7. Under the column "Record ID", find the ID number written down. It will be the last 8 digits of the record ID.
8. Click on the record ID to view the form that has the error.



Registration Questions **Corrections cont.**

Question:

Response:

Will IRIS ever allow you to correct a 1099 vendor more than once in the future?

If you mean, can you file multiple corrections for same original, you can currently make multiple corrections. Once the original form is successfully corrected, if an additional correction is needed, then select the most recent corrected form. Each correction is linked to the previous correction in the system.

Corrections in IRIS required one to have the previous header information, how do we get this information if we were not the original filer?

When filing through a Third-Party Transmitter obtain the following for each submission filed on your behalf:

- A copy of all electronic records within each submission, along with the receipt ID for the transmission in which they were filed.
- The transmission Acknowledgement that includes the Status that is returned when processing is complete (Accepted, Accepted with Errors, Partially Accepted, Rejected) and a detailed list of errors, if any.

Note: The items cited above are critical to your ability to make corrections if your Third-party Transmitter is no longer available to file corrections on your behalf.

Only those persons listed as an Authorized User on the IRIS Application for TCC qualify to receive information about a receipt ID associated with a TCC listed on that application.

For forms submitted through the Taxpayer Portal, the vendor who filed the original form will need to submit the correction

What is the best way to input so you don't have to duplicate entries when you have an Error?

Forms should only be entered one time, as the original. If you need to correct an error on the original filing, the correction does not duplicate the original record. The corrected forms will have their own receipt ID and the original transmission receipt ID will not change the data within the original transmission. The original data is not deleted or overwritten so you have a record to show when it was submitted, what was submitted and then when it was corrected.



Registration Questions **Customer Service**

Question:	Response:
What is the number to call when there is a problem with the upload to actually speak with a live person.	All available assistors are taking calls. We recommend you call early. Help Desk Monday through Friday 7:30 am – 7:00 pm 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.
Can we make improvements to the testing process so that it doesn't need to happen over the phone?	We are currently researching other options to allow the testing process to be completed in writing. We will share information once it becomes available.
Is there a way to contact IRIS by email if not, why not. thanks	There are no plans to establish an IRIS email address. We are looking into options to submit questions in writing.



Registration Questions **Misc.**

Question:	Response:
<p>The last few months I have had difficulty connecting to the meeting. I enter the captcha code then it tells me I'm connecting with too many devices.</p>	<p>IRIS working group calls are held via Teams. If calling in or joining via the link in the meeting invite, a passcode is provided. After registering for each meeting, you should be able to join the calls. You may want to try clearing the data on the Teams app and signing out and signing back in. You may need to contact your system administrator.</p>
<p>The layout for Form W-9 does not correspond to the IRIS individual name fields. Form W-9 uses a single line for the individual taxpayer's name. The IRIS input has separate fields for first, middle (middle initial) and last name of the taxpayer.</p>	<p>The IRIS system was not designed to mimic the layout of Form W-9 due to electronic intake requirements. Form W-9, Line 1, was designed with a multipurpose use to allow a business name or individual name entered. IRIS requires an individual's name to be entered by first/middle/last name.</p>
<p>Is there a plan to support JSON to communicate with IRIS in addition to XML?</p>	<p>IRIS uses Extensible Markup Language (XML) format, allowing users to bulk file large volumes of information returns. There are no plans to change to JSON in the future.</p>
<p>Software apps that utilize the IRIS filing system.</p>	<p>The IRS does not provide a listing of vendors or applications that provide products and/or services to filers through IRIS.</p> <p>There are 2 types of third-party providers:</p> <ul style="list-style-type: none">• Service Bureau - A company that will submit files electronically to IRS.• Software - A purchased software program used on your computer to create electronic tax return filed according to IRS established guidelines.
<p>State Returns.</p>	<p>The IRIS system collects the information for states participating in the Combined Federal/State Filing (CF/SF) program. Additionally, only specific Information Returns are included in the CF/SF program. An issuer/transmitter must select the CF/SF option on their IRIS TCC application to be approved. Publications 5717 and 5718 provide a list of forms and states that participate in the CF/SF program.</p>



Registration questions **Misc. cont.**

Question:	Response:
When is the expected transfer of 1042-S?	Form 1042-S is still in the development process. It is tentatively scheduled to be available in IRIS TY25/PY26. We will share information about the form as soon as possible.
When will the IRIS specs be available for the 1099-DA?	Form 1099-DA is still in the development process. It is tentatively scheduled to be available in IRIS TY25/PY26. We will share information about the form as soon as possible.
Allow developers to access schema and business rules before they have completed all the necessary TCC applications, etc., just like we could see the file layout requirements of FIRE without going through all those steps.	Business rules and schemas are only available to filers with an IRIS A2A TCC with a role of "Software Developer" or business structure of "State Government Agency", "Local Government Agency", or "Federal Government Agency".
Updates that may impact reporting for TY 2025.	IRIS updates for TY2025 are generally based on forms updates that are made in late summer, early fall. You can monitor IRS.gov/draft-tax-forms for publications. Other updates are made to business rules or schema based on identified issues. Known Issues are available on the IRIS known issues and solutions webpage.
Will we be able to see/receive a copy of 1099s from a bulk upload?	IRIS A2A does not provide that functionality.
Since the NEC filing deadline has passed, can a business still file through A2A? If so, how long should a software vendor keep the option available?	Yes, you may file information returns after the due date. For IRIS, prior year forms can be filed effective the date they were made available in IRIS.



Registration questions **Out of Scope**

Question:	Response:
How to acquire TIN matching; I've applied but nothing came of it	Please visit the Taxpayer Identification Number (TIN) Matching webpage for additional information. Review Publication 2108-A - e-Services On-Line TIN Matching Program to see if you're eligible to participate or call 866-255-0654 for specific issues.
Does each entity have to have an application for TIN matching? Or can 1 entity run them all.	Please visit the Taxpayer Identification Number (TIN) Matching webpage for additional information. Review Publication 2108-A to see if you're eligible to participate or call 866-255-0654 for specific issues.
Business returns	This call provides information about filing Information Returns through IRIS. IRIS does not accept business returns. For questions about business returns, please call the Business and Specialty Tax line at 800-829-4933.
Ability to file 941/940 information without software like we do for the 1099 series	Form 940 and 941 are employment tax returns and are not planned to be available to be filed through IRIS. Tax returns are filed through the MeF platforms and information returns are filed through the IRIS platform.
About profit and loss from small businesses is there a specific document clients need to present aside from expenses reports and receipts?	This call provides information about filing Information Returns through IRIS. IRIS does not profit and loss forms. For questions about business returns, please call the Business and Specialty Tax line at 800-829-4933. For profit and loss schedules that attach to Form 1040, please call the Individual Tax line at 800-829-1040.
New service bureau	This call provides information about filing Information Returns through IRIS. We do not have any information on any other agencies.
My client filled out a 1041, 1099-OID and 1096 by paper but he never received the credits that he reported on those forms. What can I do for him using IRIS?	This call provides information about filing Information Returns through IRIS. The IRIS team is not able to assist with paper filed forms. Please call the Business and Specialty Tax line at 800-829-4933



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)

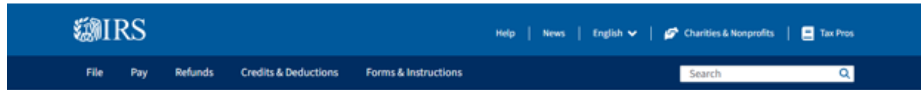
www.irs.gov/iris - a website that provides general information about IRIS

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



IRIS Taxpayer Portal Hints

www.IRS.gov/IRIS



Home / File / E-file information returns with IRIS

E-file information returns with IRIS

Individuals

Businesses and self-employed

Charities and nonprofits

International taxpayers

Governmental liaisons

Federal, state and local governments

Indian tribal governments

Tax exempt bonds

Taxpayer identification numbers (TIN)

IRIS Taxpayer Portal helpful hints

- Where can I find the required fields for the CSV templates?
- I uploaded a CSV file and nothing happens when I select "Start".
- The Taxpayer Portal just spins after I select "Add All" for CSV uploads.
- The Taxpayer Portal notifications are not showing my download.
- PDF downloads are showing in the notifications section on the Taxpayer Portal but unable to download the form.
- PDF downloads do not include a payer/issuer copy.

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

Publications

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

Email updates

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

IRIS help

Get support with IRIS:

[Help desk](#)

IRIS Taxpayer Portal helpful hints

Where can I find the required fields for the CSV templates?

The CSV file formatting guidelines are provided on the Taxpayer Portal. On the dashboard click the Upload CSV with Form Data tile, then on the right side of the next page under FAQ, #8 has the template formatting guidelines. You may download the formatting guidelines for each form you need to file.

Tips for troubleshooting CSV errors are provided in Publication 5717 (Rev. 9-2024).

I uploaded a CSV file and nothing happens when I select "Start".

Confirm the file is saved as a CSV file. After uploading the file, a blue box should appear with the title "Current Uploaded File". The blue box will include the name of your file. If your file is not listed, please refresh your page and try uploading again. If your file name is in the blue box and there are no issues, the 'Start' button will turn blue to indicate it is active.

The Taxpayer Portal just spins after I select "Add All" for CSV uploads.

The Taxpayer Portal notifications are not showing my download.

PDF downloads are showing in the notifications section on the Taxpayer Portal but unable to download the form.

PDF downloads do not include a payer/issuer copy.

Portal hints are located at the top of the IRIS landing page



IRIS Working Group

www.IRS.gov/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, [go to the IRIS Taxpayer Portal](#).
[IRIS Taxpayer Portal User Guide](#) Publication 3712

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

Publications

- [IRIS Taxpayer Portal User Guide](#) Publication 3712
- [IRIS Electronic Filing Application to Application \(A2A\) Specifications](#) Publication 3714
- [IRIS Test Package for Information Returns](#) Publication 3712

Email updates

Get updates on issues, changes and working group meetings about IRIS.
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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](#)
- International: [470-769-5100](#)
- TTY/TDD: [866-937-4130](#). Use your choice of relay.

Working group meetings

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

Transmitter Control Code (TCC).
 TCC can only be used

Information to

software, you can use

Follow these steps:

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](#)
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Working group meetings

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

Related

- [Guide to information returns](#)
- [General instructions for certain information returns](#)

Working Group link is located on the right-side content box on the IRIS landing page



IRIS FAQs

www.IRS.gov/IRIS



[Home](#) / [Tax Pros](#) / [Modernized e-File](#) / IRIS working group meetings and notes

IRIS working group meetings and notes

Enrolled agents

Annual Filing Season Program participants

Enrolled retirement plan agents

Certified Professional Employer

The IRS holds monthly working group meetings to provide updates and support for the Information Returns Intake System (IRIS). The meeting is for software developers, transmitters and state agencies interested in the IRIS Application to Application (A2A) intake system.

Meetings are usually held the **second Wednesday of the month at 1 p.m. Eastern time.**

We publish meeting notes afterward.

Related

[Information returns intake system FAQs](#) PDF



[Information returns intake system FAQs PDF](#)

IRIS FAQ pdf is located on the IRIS Working group page



2025 Working Group Index

January 2025	February 2025	March 2025
Filing Season update: Volume count Due dates Opening date & what forms may be filed	Filing Season Updates Number of Forms Filed Highest volume forms Upcoming e-filing due dates	Filing Season Updates YTD Number of Forms Filed Highest volume forms Upcoming e-filing due dates
Top flagged Business Rules.	Known Issues for the Taxpayer Portal: New issues Resolved issues	Known Issue Updates: A2A Taxpayer Portal
Known Issues (Taxpayer Portal): PDF downloads 1099-R 1099-PATR 1098 Schema validation rejections	Useful Tips & Updates Taxpayer Portal Helpful hints IRIS WG meeting webpage link IRIS FAQs (PDF) added link CF/SF Info CSV Error	Registration Questions
Updates/Useful Tips: Which role to select Status definitions Issuer Management	Resources Added WG Index to PowerPoint	



2024 Working Group Index

January 2024	February 2024	March 2024	April 2024	May 2024	June 2024
Explanation of IRIS intake methods	Signatures on TCC application	TCC reminders	A2A transmission endpoints tips	New forms added to taxpayer portal for TY2023	Upcoming Form changes
Transmitter Control Codes, application signatures and correct roles	Filing corrections	Reviewing errors on taxpayer portal	Introducing the Known Issues and Solutions document	Difference between Transmitter and Issuer Roles	
A2A Assurance Testing System (ATS)	TIN Validation errors	CSV file common errors		CP2100/CB2100A notices	
Top business rules setting and TIN Validation errors				Making corrections in taxpayer portal	
July 2024	August 2024	September 2024	October 2024	November 2024	December 2024
TCC reminders	Drop dates for schema packages	IRIS video links broken	Publications updated for PY2025	PY2025 shutdown/cutover	PY2025 shutdown/cutover FS Opening Date
Schema package access and availability	A2A Schema will allow reporting cents in TY24	Explaining TCC roles	New forms added to A2A for TY2024	Check system status	Operational Status: ATS Open IRIS closed till FS Opening
Combined Federal/state filing program (CF/SF)	TY2024 ATS overview	Requests to add/remove state from CF/SF program	TY2024 ATS reminders	Schema validation errors and messages in TY2024 ATS	ATS Reminders
			API Client ID application page	How to report an individual name with a DBA name	Maintaining TCC
			JSON Web Tokens (JWTs)	Forms 5498 with three new repayment codes implemented post January 2025	1099-K updated threshold limits
					5498 KI - 3 new codes



2023 Working Group Index

September 2023	October 2023	November 2023	December 2023
IRIS Overview	FAQ's	Updates	TY2023 Operational Status
Registration/Application		ATS Process	Pub. 5718 Updates
A2A Schema Package		API Client ID	Access Token
ATS Process		IT Support	TY2023 IRIS ATS
			Series 1099 Form Updates
			CSV Upload



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

- **Meetings are not recorded. The PowerPoint and Questions and Answers will be posted to the IRIS working group meetings and notes webpage at www.irs.gov.**
- **No retirement date for FIRE has been determined. FIRE and IRIS will run parallel. An announcement will be made when a retirement date for FIRE has been determined.**