

Portal Transition Guide for Modernized e-File (MeF)

Introduction

The purpose of this guide is to assist software developers, transmitters, and states in the transition of MeF to the new Integrated Enterprise Portal (IEP). The MeF application version and current supported schemas will not change as part of this migration. This is a technical publication and is not intended for tax preparers. The transition to the new portal (IEP) should be transparent to tax preparers and taxpayers.

IRS is in the process of completing a multi-year upgrade to the on-line portal infrastructure. The earlier infrastructure has served the IRS, its partners, and taxpayers well. With the success of IRS.gov, the portal applications and other interactive applications, the demands on the portal infrastructure significantly increased. In order to continue to meet the expanding on-line portal needs, the IRS portal infrastructure needed a significant upgrade. The new service based infrastructure will allow the IRS to support the portal needs for the foreseeable future.

Some of the benefits of the new IRS portal infrastructure:

- One-stop, Web-based services to internal and external users.
- Enhanced secure and reliable portals with a modernized portal design and increased systems capacity.
- Keeps IRS information current and accurate with near real-time updates of more than 110,000 forms, publications, news items, rules, and articles.
- Meets demand from the public taxpayer for information and resources, and from the tax preparer population for support for resources and submissions.
- Improves user experience for both taxpayers and tax preparers by making information and materials easy to find and obtain.
- Offers self-service options for taxpayers and tax preparers for information and publications.
- Reduces paper and person-to-person interactions between the IRS and the public taxpayer/tax preparer to complete a tax transaction.
- Taxpayers and tax preparers can more easily find and obtain information and material without calling the IRS.
- Supports tax preparer submissions.

The first phase of the IRS portal upgrade was the transition to a new IRS.gov in August 2012. The second phase supports all registered user applications and is scheduled to be implemented over the Labor Day weekend of August 31st through September 2nd, 2013, with full operation on September 3rd, 2013.

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Information Highlights

- The MeF Production and ATS environments will be migrated to the new portal (IEP) and will be *fully operational* to all software developers, transmitters and states on Tuesday, September 3rd, 2013 at 12:00 p.m. ET. The MeF application version and current supported schemas will not change.
- The new portal (IEP) will require new public SSL certificates for establishing the SSL connection. Your software or browser configurations may be set up to automatically download these certificates when it connects to the new portal (IEP) the first time. Information on where you can manually download them is located in the Technical Guidelines section below.
- A2A toolkit users (SDK and client application) are also impacted by these changes. Please read the Technical Guidelines section below for more details.
- Testing in ATS through the new portal will be available on Monday, August 12, 2013 at 12:00 p.m. ET. The new “la.alt” URL listed in the Technical Guidelines section will be used for this purpose. The IRS encourages comprehensive and frequent testing through the new portal (IEP).
- Software developers, transmitters, and states that need to access the ATS environment through the current portal to pass ATS or retest their software can continue to use “la main.” The “la main” URL will not be impacted prior to the September 3, 2013 full migration.

Timeline of Events

- August 12th 12:00 p.m. ET – Transmitters will be able to test communication with ATS through the new portal (IEP) using the new “la.alt” URL listed in the Technical Guidelines section below. See the Testing and Support during the Migration section below for more information about the schedule for testing and how to get support.
- August 30th to September 2nd – Labor Day Power Outage. ATS and Production environments of MeF will be unavailable. Additional information will be provided in an upcoming QuickAlert.
- September 3rd 12:00 p.m. ET – MeF will be fully available to all users. All MeF traffic will go through the new portal (IEP). The Production and ATS URLs will not change.

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Technical Guidelines

Enterprise Firewall Configuration:

If clients must connect through enterprise firewalls which restrict their outbound connections by IP address please send an email to the MeF Mailbox at mefmailbox@irs.gov . Please include your DNS information and whether you support IPv6 or IPv4.

URL Addresses for IEP Servers:

| Application | URLs to Test IEP | URLs to MeF After Go Live |
|-------------|---|---|
| A2A | https:// la.alt-iep.www4.irs.gov/a2a/mef | https:// la.www4.irs.gov/a2a/mef |
| IFA | https:// la-iep.www4.irs.gov/mef/ifa/internetFilingHome | https:// la.www4.irs.gov/mef/ifa/internetFilingHome |

All test URL's for A2A clients, during the preliminary testing period, will begin with <https://la.alt-iep.www4.irs.gov/> instead of <https://la.www4.irs.gov/>, although the lower-order parts of the URL (starting with "/a2a/") will not change. You will have to change your configuration or code to connect to those.

All test URL's for IFA clients, during the preliminary testing period, will begin with <https://la-iep.www4.irs.gov/> instead of <https://la.www4.irs.gov/>, although the lower-order parts of the URL (starting with "/mef/") will not change.

Caches:

Our recommendation is to clear cache information on your devices; desktop, server, browser, laptop etc.

Certificate location:

The new portal (IEP) will have different server certificates for establishing the SSL connection than the current portal (RUP) has. Your software or browser configurations may be set up to automatically download these certificates when it connects to IEP the first time. If you need to manually download the certificates for the testing period and production they are available on the [MeF User Guide & Publications](#) .

The certificates are in a ZIP folder with the file extension *.txt. If you need to convert them to another file type (*.cer, *.crt, *.pem, etc) in order to upload them to your server you can rename the certificates to the necessary file type.

After the Go Live date you will not be able to navigate the SSL handshake for the <https://la.www4.irs.gov> URLs unless you loaded the certificates or your system has automatically downloaded them.

Note: We recommend you do not remove the current portal (RUP) SSL certificates from the trust store until after the Go Live date. These certificates will allow you to access the current environment until that date.

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A2A Toolkit Users:

A2A toolkit users need to make changes to endpoint URLs to point to new portal (IEP) endpoint URLs for their applications. Please refer to the [MeF_Client_SDK_InstallationGuide](#) for changing endpoints. A2A toolkit URLs are in a config file (ats_endpoints for ATS and prd_endpoints for Production) in the config folder of toolkit installation.

The new portal (IEP) server certificates need to be added to the A2A Toolkit Trust Store.

Testing and Support During the Migration

MeF recommends that software developers and transmitters send as many Release 8 test scenarios and other service requests necessary to feel confident that the infrastructure change has not caused an unexpected negative impact on their system. States are also encouraged to test as well.

External Support Hours

The External Bridge Line (1-888-331-8226 Access Code 3600320) for testing and migration support will be available:

- Monday August 12, 2013: 12:00 p.m. ET to 6 p.m. ET
- Tuesday August 13 through Friday, August 23, 2013: 9:00 a.m. ET to 6 p.m. ET
- Issues and questions can be sent to the MeF Mailbox at mefmailbox@irs.gov after hours but will not be answered until the next day.

Production Go Live Support

- Tuesday September 3 through Monday September 16, 2013: 9:00 a.m. ET to 6 p.m. ET

How to Request Support

For assistance or to report issues software developers, transmitters and states can call into the External Bridge Line (1-888-331-8226 Access Code 3600320) or send an email to the MeF Mailbox at mefmailbox@irs.gov. When contacting us please include your contact information, question(s), and for specific transmission issues the Timestamp, MessageID, and a copy of any error messages you received.

If testing support is needed or you identify an issue after August 23, 2013, please send an email to the MeF Mailbox at mefmailbox@irs.gov.

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Test Participation and Scheduling

The IRS is requesting software developer and transmitter cooperation in helping to orchestrate a phased ramp up of testing to ensure minimal impact to all users. To this end we would like to control the number of software developers, transmitters and states that test during the first two days. The IRS is proactively reaching out to a number of companies asking them to participate in a controlled and scheduled test. If you have not been contacted by the IRS by 5:00 p.m. ET on Wednesday, August 7, 2013 and would like to be considered for participation during the first two days please send email to the MeF Mailbox at mefmailbox@irs.gov by Friday 12:00 p.m. ET, August 9, 2013.

The open testing period is August 14, 2013 through August 23, 2013. Live support will be available during the support hours listed above. The IRS encourages comprehensive and frequent testing through the new portal (IEP) during this time. As testing progresses, the IRS may reach out and ask that testing be suspended for periods of time. In this event the IRS will issue a QuickAlert and post information on the [MeF Status Page](#).

Production Go Live Schedule and Support

Production support will be available starting September 3rd, 2013. See schedule above.

After the Labor Day Power Outage the IRS will bring up IRS systems on Monday September 2nd, 2013 including the MeF application late in the evening. **We are asking software developers, transmitters and states to refrain from accessing the system prior to Tuesday September 3rd, 2013 12:00 p.m. ET.**

The IRS will proactively reach out to a number of companies and states to ask them to participate in production verification activities on Tuesday morning September 3rd, 2013.

Revision History

| Version Number | Summary of Changes | Changes Marked |
|----------------|---|----------------|
| 1.0 | Initial Draft | No |
| 1.1 | Information added to the "Certification Location" section | Yes |
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