Using the Single Access Portal (SAP) to apply for an SOI Joint Statistical Research Program (JSRP) project

Before you begin…..

- All research proposals must be submitted through the Single Access Portal (SAP) located at Research Data Gov
- Please read the Single Access Portal User Guide located at the top of the research data gov home page - "How to Apply".
- You will be asked to input information for "Principal Investigator" and "researcher". If the Principal Investigator(s) and/or non-student Researcher(s) plans to request access to confidential data, they must qualify as an IPA and be a US Citizen. Generally, this requires that you are employed by a non-profit (most universities and colleges) or by a state or local government. For more details on IPAs visit Intergovernment Personnel Act (opm.gov).
- Student researchers requesting confidential data access must be enrolled in a degree program and be a US Citizen. Their information should be entered under "researcher".
- Students cannot be the "Principal Investigator".
- Investigators and Researchers who do not qualify as IPAs or students cannot be granted access to confidential data. However, they may participate in the research project under a Memorandum of Understanding that limits their access to disclosure reviewed material approved for release by an IRS employee.
- You do not need to have "Special Sworn Status" (SSS) with the Census Bureau.
- SOI projects must be completed in five years from the time data access is initiated. After five years **ALL** researchers on the project will lose data access regardless of whether they are still students or are IPAs who have not exceeded the four year IPA limit.
- Currently, we are not able to accept projects involving data from other agencies.
- Projects will begin as telework projects. Note that it is possible that at some point during your project we may require that you work from a local IRS office.

Once you are logged into RESEARCHDATAGOV

- select "IRS Statistics of Income Division"
- You will see a list of files – select the file that most closely aligns with your proposal. Other files are available, but you MUST first select one from this list to continue. At a later point in the application, you will be asked to list the IRS data you require to complete your project.

As you complete the application, for the questions on:

- **Timeline, Methodology, References,** and **Requested Output** – For these items you must upload a document (word or PDF).
- **Funding** - SOI does not need information on Funding. Leave blank

- **Time, Geographic, and other Units Requested**
    - Please list the years of data, tax forms (1040, Schedule D, 990, 1120 etc.), geographic and demographic data that are required for the project.
    - Example – Tax Year 2015-2020 Form 1040 and W-2 data by state and age and gender of taxpayer.
- **Requested Output** - Please upload a document that briefly lists/describes the output you expect to generate such as tables or graphs. This is most relevant for disclosure avoidance purposes. Also, if you are aware of various disclosure avoidance techniques, what techniques will you apply to the data? – rounding, suppression, percentage rules etc.