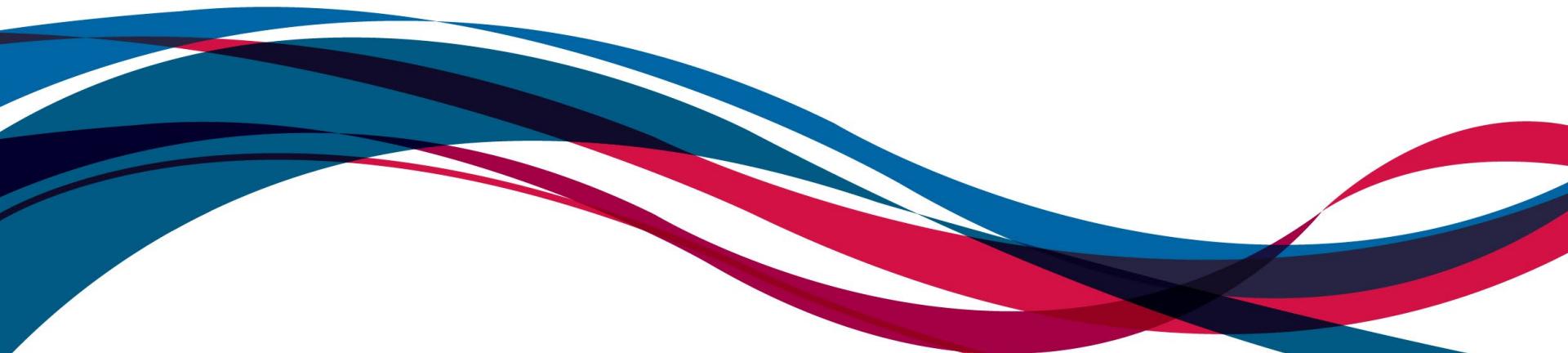




Information Returns Intake System (IRIS)

Working Group Meeting

Date: June 11, 2025





Agenda

- Welcome
- Filing Season Update
- Tips/Updates
- Questions
- Resources

Mics and Chat have been muted.

The PowerPoint will be posted to www.irs.gov/IRIS after the meeting.

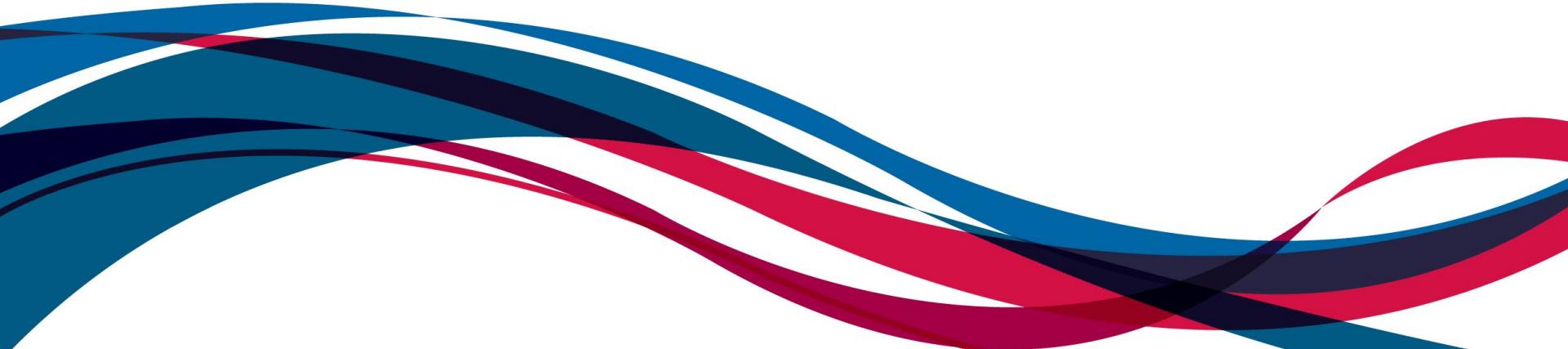
During today's meeting we will open the chat to answer questions relating to the IRIS system only. Please keep your questions within the IRIS scope. If you have a question that refers to some of our other Information Return Filing options, you can find more information at www.irs.gov/filing/e-file-information-returns.

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



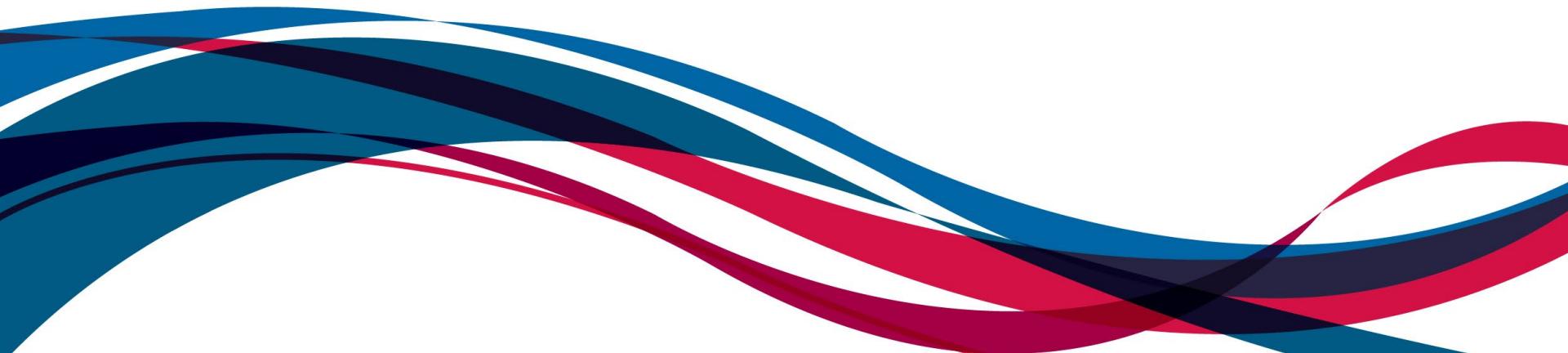


IRIS Filing Season Update

- Since the opening of Filing Season 25 (FS25) on January 10th, IRIS has received over **136 million** records
 - A2A: Over 134 million records
 - Taxpayer Portal: Over 2.6 million records
- 04/22/2025 over 15 million records received on that day
- 04/23/2025 over 25 million records received on that day
- IRIS has surpassed the total number of forms received last year from January-December
 - TY23/PY24: 12.4 million



Tips/Updates

A decorative graphic at the bottom of the slide consists of several thick, wavy lines in shades of blue, red, and white, resembling stylized waves or ribbons.



Prior Topics Currently Under Review

Topic	Update
Retirement of FIRE, AIR, etc.	<p>IRS is targeting the retirement of the Filing Information Returns Electronically (FIRE) system at the end of December 2026.</p> <p>IRIS will be the only intake system available for FIRE related forms and the 1099-DA forms beginning in January 2027.</p> <p>We encourage you to make the transition from FIRE to IRIS.</p> <p>AIR retirement TBD</p>
Increase the number of entries on a taxpayer portal CSV upload file from 100 to 250	No updates
Move the location of the Template Formatting Guidelines on the Taxpayer Portal	No updates
Update IRIS Taxpayer Portal to display Transmissions with a Transmission Type Column showing Original/Replacement/Corrections to allow filers to easily see the transmission type for each Receipt ID	No updates
Masking/Truncations of Recipient TIN on Taxpayer Portal PDFs	No updates
Add Business Name Line 2 on Taxpayer Portal PDFs.	No updates
Taxpayer Portal PDF Zip Files, Add a column to display the name for each PDF on Taxpayer Portal	No updates
Display/print three (3) recipient copies per page on Taxpayer Portal PDFs. This will reduce the number of pages the filer needs to print and mail to the recipient.	No updates



Future Forms TY25/PY26

Form	Title
1042-S	Foreign Person's U.S. Source Income Subject to Withholding *Domestic filers only
1099-DA Only accepted through IRIS	Digital Asset Proceeds from Broker Transaction
5498-QA	ABLE Account Contribution Information

- Draft schemas for TY25/PY26 should be available tentatively July
- Final schemas for TY25/PY26 should be available tentatively August
- Publications should be available tentatively August



A2A Corrections

- Corrections can only be made to previous submissions/records that have been “Accepted” or “Accepted with Errors”.
- Corrected information returns MUST be filed electronically if the original return was submitted electronically.
- Originals filed in FIRE must be corrected in FIRE and originals filed in IRIS A2A must be corrected in IRIS A2A.
- Transmitters should file corrections with IRS as soon as possible and furnish a copy of the corrected return to the Recipient.



A2A Corrections Process

- The correction process can be utilized when:
 - IRS notifies the Transmitter of one or more errors on the information returns (Form Detail) filed.
 - The Transmitter identifies one or more errors on the information returns (Form Detail) filed.
 - The Recipient reports an error.
- Do not file an original again, as this may result in duplicate reporting.
- The UniqueRecordId assigned by IRIS allows corrections to be linked to the original information return.
 - You must provide the UniqueRecordId.

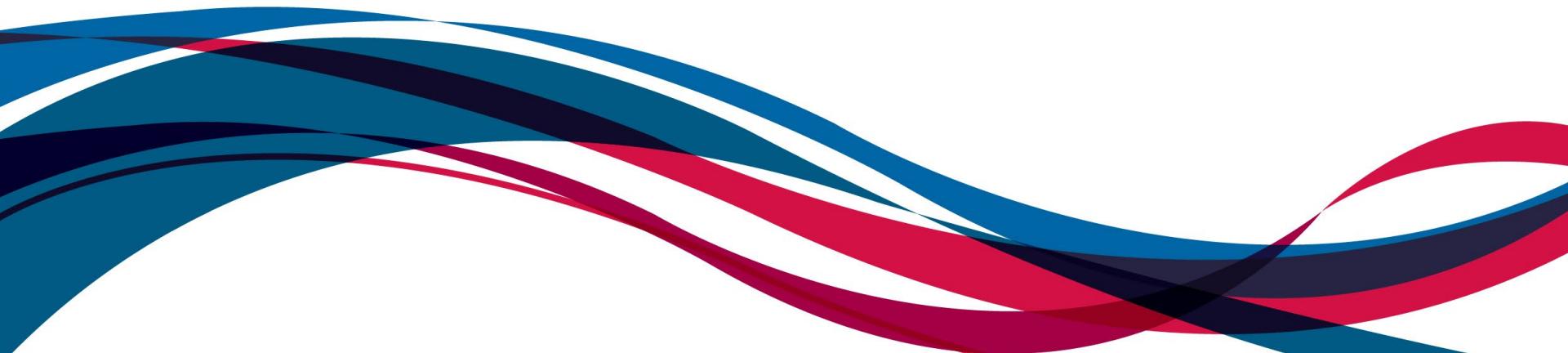


A2A Correction Chart

1-Step Correction Procedure	2-Step Correction Procedure
<ol style="list-style-type: none">1. Prepare a new transmission with TransmissionTypeCd “C” in the Manifest. (Do not mix original and corrected records in the same transmission payload.)2. Include an IR Submission Group for each form type and issuer being reported. (The IssuerDetail in the SubmissionHeader must be the same as the original submission.)3. Include the complete record for correction. Do not submit only the corrected data.4. The CorrectedInd in each correction record must be set to “1”. Include the PrevSubmittedRecRecipientGrp with the UniqueRecordId. This element is optional in the schema but enforced with a business rule. It must be present on all corrected records, or the submission will reject. <p>Note: An original is only corrected once. If after a correction is filed and accepted, an additional correction is needed, use the UniqueRecordId associated with the most recently accepted correction.</p>	<ol style="list-style-type: none">1. Follow steps for a one-step correction, entering “0” in all payment amounts.2. Once the first correction is Accepted, submit a new transmission with TransmissionTypeCd “O” in the Manifest.3. Include an IRSSubmissionGrp with the correct form type in the IRSSubmissionHeader and IRSSubmissionDetail.



Transition to IRIS





FIRE Retirement

Tax Year 2026/Filing Season 2027 is the targeted date for the retirement of the Filing Information Returns Electronic (FIRE) system. FIRE will not be available for submissions in Filing Season 2027. The Information Returns Intake System (IRIS) will be the only intake system for information returns currently received through FIRE.

We encourage you to complete your IRIS TCC application and begin transitioning to IRIS to ensure you are ready for 2027 filing season.

Stay tuned for QuickAlerts, IRIS Working Group meetings and additional material for further guidance.



Transition from FIRE to IRIS

- Apply for an IRIS Transmitter Control Code (TCC)
- A2A users must obtain an Application Program Interface (API) Client ID
- Purchase software from a third party or develop software using schema package
 - The Schema and Business Rules packages are made available in the Secure Object Repository (SOR) late spring, early summer for the next tax year
- Submit IRIS Assurance Testing System (ATS) transmissions
 - IRIS ATS environment is open year round
 - TY25 ATS is tentatively scheduled to begin in November



IRIS Helpful Hints

- Software Package information must be updated annually through the IRIS Application for TCC.
- New Software IDs will be assigned for each tax year.

- Filing Prior Year Returns
 - Use the schemas and business rules that are in effect for that tax year.
 - Do not use the current year schemas and business rules.
 - Do not mix or combine tax years in the same transmission or submission.



Registration Questions

A decorative graphic at the bottom of the slide consists of several thick, wavy lines in shades of blue, red, and white, resembling stylized waves or ribbons.



Registration questions

Question:	Response:
A complete walkthrough of registering and current timeline for the approval process. When will the .csv portal upload templates be available for January 2026? Will the templates only be available in the IRIS Portal or will they be posted on IRS.gov?	A walkthrough for registering and the timeframe is provided in Publication 5903, IRIS Application for TCC Tutorial. The CSV portal templates will be available in January when IRIS opens for filing season. If the date changes, we'll provide it on a future working group call. The CSV templates are only available on the IRIS Portal and will not be posted to IRS.gov.
I would like to know how the second person signs the contract, or do they have to do their own application?	We need more information to provide the best response to this question. Please call the Help Desk.
How do I fix my account so I can submit my forms plus forms for another family member?	On the IRIS TCC Application Summary page, select the Application Details header at the top of the page and then you can click on the Transmission Method to change to the portal transition method. After you change the transmission method you will need to resubmit. Typically, it will take a day or two to update the application.
Is there any consideration for non-US withholding agents/service providers with regard to registration? Currently, it is required to have an SSN to register with ID.me and so forth. What can be done to accommodate non-US filers?	The IRIS TCC application requires a Social Security number (SSN) or individual tax identification number (ITIN) for system access and individual authentication. The IRS is aware that foreign individuals who are acting on behalf of their foreign employer (e.g., Foreign Entities, Foreign Financial Institutions, Qualified Intermediaries, etc.) may not be able to obtain an ITIN or SSN to complete the IRIS TCC application and continues to explore other ways for taxpayers to authenticate their identities, including a government-sponsored option.
We're can I find guides?!	The CSV File Formatting Guidelines are provided on the Taxpayer Portal. To find the Formatting Guidelines: in the Taxpayer Portal, 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. Tips for troubleshooting CSV errors are provided in Publication 5717 (Rev. 9-2024).
Guides and information for payroll providers. Submissions, validations, confirmation for all taxes and forms.	For information regarding submissions, validations and confirmations please refer to Publication 5718, Information Returns Intake System (IRIS) Electronic Filing Application to Application (A2A) Specifications.



Registration questions (cont.)

Question:	Response:
Will 1042S be available on IRIS?	Form 1042-S will be available on IRIS for Tax Year 2025 in January 2026.
1099-DA specs, business rules	Form 1099-DA schema and business rules should be available in early July.
Can the IRIS schema be made public? For payer name or TIN mismatches is there any system that can be leveraged to confirm that information prior to submission?	IRIS schema and business rules are only available through the Secure Object Repository (SOR). You need a Software Developer IRIS TCC or be a Federal, State or Local Government Agency. You also need an active registered user account in e-Services to access the SOR. If you do not have an account, you will need to set one up.
Will the IRIS XML schema and business rules be made publicly available? 5717 and 5718 is not sufficient on its own to help employees trouble shoot transmittal issues.	IRIS schema and business rules are only available through the Secure Object Repository (SOR). You must have an IRIS Transmitter Control Code (TCC) and an active registered user account in e-Services to access the SOR. If you do not have an account, you will need to set one up
Formatting the 1099 and difference in INT/NEC, etc...	There are sample XML files in the IRIS schema package.
How a correction or a late submission, is to be communicated to the IRS through the Intake System, if that is even an option?	IRIS accepts corrections and late submissions throughout the filing season until early December.
Prior Year and Corrections - Accepted w/Errors for TIN mismatch - rules on corrections	The February 2024 Working Group deck has details on filing corrections for TIN Validation errors. IRIS informs filers of these errors at intake, giving time to research and correct the data if possible. See Publication 1586, Reasonable Cause Regulations and Requirements for Missing and Incorrect Name/TINs of Information Returns for more information.
Procedure for correcting errors; procedure for updating authorized users (ie adding or deleting)	Correction procedures are addressed in the February 2024 Working Group slides for the IRIS Taxpayer Portal and in Publication 5718 for A2A filers. For TCC questions, see Publication 5903, IRIS Application for TCC Tutorial.



Registration questions (cont.)

Question:	Response:
If accepted with errors Name/TIN mismatch will be used to generate CP2100 letters; 1. will the B-notice process remain the same? 2. When does a Name/TIN mismatch require a correction in IRIS? Pub 1281 says not to correct unless \$ amount.	IRIS notifies filers of TIN mismatches. Follow Publication 1281 for guidance on actions filers must take.
Yes, how can we upload the 1099 as a batch?	<p>IRIS has two intake options for submitting forms and the business will need to determine which option is best for them.</p> <p>1. Application to Application (A2A)</p> <p>The IRS offers the IRIS Application to Application (A2A) filing method which requires special software or a third-party provider to use. A2A uses Extensible Markup Language (XML) format, allowing users to bulk file large volumes of information returns. For more information about IRIS A2A, refer to Publication 5718, Information Returns Intake System (IRIS) Electronic Filing Application to Application (A2A) Specifications. The IRIS A2A intake method has a limit of 100MB per file size.</p> <p>2. The Taxpayer Portal allows you to enter data to create forms by either keying in the information or uploading a Comma-Separated Values (CSV) file. For more information about IRIS Taxpayer Portal, refer to Publication 5717, IRIS Taxpayer Portal User Guide.</p> <p>The IRIS Taxpayer Portal has a limit of 100 records per CSV file; however, you may submit an unlimited number of CSV files. You must have a TCC for the Taxpayer Portal to obtain the CSV file templates. For more information about IRIS Taxpayer Portal, refer to Publication 5717, IRIS Taxpayer Portal User Guide.</p>
online 1099 entering	The IRIS Taxpayer Portal allows filers to manual enter the data for each form or upload a Comma-Separated Value (CSV) file. Information about using the IRIS Taxpayer Portal is in Publication 5717, IRIS Taxpayer Portal User Guide. Please call the Help Desk if you have a specific question or issue.
Create reporting features - ability to run a report on all 1099 filed for a specific year	We are not currently planning to add report features. We recommend you create a log to track the original Receipt ID and any corrected Receipt IDs for each form in each submission.



Registration questions (cont.)

Question:	Response:
Business has recently changed locations. Will the new address be used during the next fillings?	Businesses may have two addresses, a mailing address and a location address. Businesses should update the IRS if the mailing or location address has changed. You should begin using the new address on all forms once the move is complete. The company decides whether to enter the mailing or location address on all forms/returns. If the business has a mailing and location address, you should be consistent when entering the business address on all forms/returns.
We have issues connecting to IRIS A2A. We followed the guidelines as per Publication 5718. However, we still face challenges. We escalated it to the IRS IT department and waiting on it. Need help.	IRIS IT is reviewing the inquiry and will respond by email.
We're stuck and keep getting ESRV306. We've followed all the steps in publication 5712 and the troubleshooting from the Q&As. When we call the helpdesk twice, but they say they can't help with specifics. How do we escalate to get help?	<p>Possible causes for error code ESRV306:</p> <ul style="list-style-type: none">• Application must be in Completed status (API, eFile and TINM)• Verify customer granted Consent to the correct application (eFile, TINM, IVES), (Consenting back to the API application will not work.)• "kid" is case sensitive.• The "kid" in the payload should match the "kid" in the JSON key (found in the API app under Application Details)• Neither "x5t" nor the "x5c" claims should not be in the header• "iat" and "exp" time is 15 minutes• Here is a link to verify Epoch Converter - Unix Timestamp Converter• "iat" and "exp" must be notated in Epoch time (see above link)• "iat" and "exp" times cannot have a "." in it. (e.g. 16705993.36)• Ensure the customer is granting Consent to the correct Customer ID <p>Please see Publication 5718 for additional information on creating the JWKs. If you continue to have issues, please call the Help Desk at the number above in the General Section.</p>
Please add to Pub 5718 instructions on updating and replacing a certificate when it expires in the Client ID application and how the Consent App functions when the individual responsible for the Consent App leaves the company.	We are currently reviewing the publications for update for the next filing season. We will review and determine if the information should be added to Publication 5918 or Publication 5903.



Registration questions (cont.)

Question:	Response:
Question from Industry-program for the threshold when we don't know what it is example: eg.1099div F1099DIV004 'FederalIncomeTaxWithheldAmt' appears excessive in relation to income amounts reported.	The thresholds are not publicized. Please refer to the General Instructions for Certain Information Returns.
Business rule 'FederalIncomeTaxWithheldAmt' appears excessive in relation to income amounts reported. can you tell what boxes your using for the income? is it total income compared by form or by income box? what is the threshold for each form? thanks	The thresholds and calculations are not publicized.

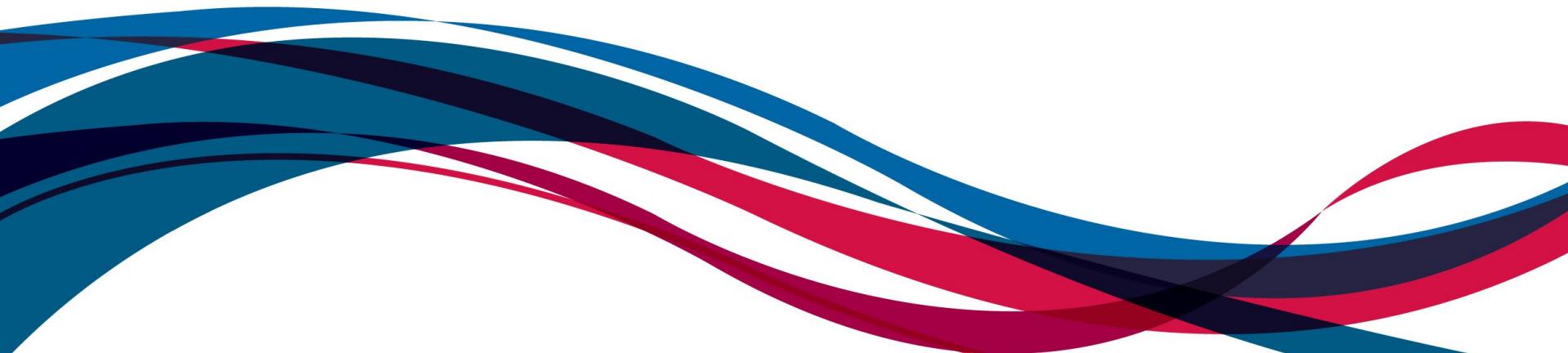


Registration questions (cont.)

Question:	Response:
Please clarify the statement made last month re: the retirement of FIRE. Will FIRE be available through the end of filing season 2027, or will it be retired at the beginning of FS 2027 such that IRIS will need to be used to file tax year 2026 returns?	Tax Year 2026/Filing Season 2027 is the targeted date for the retirement of the Filing Information Returns Electronic (FIRE) system.
Do we need to obtain a new TCC?	TCCs are not interchangeable between intake systems. FIRE TCCs can only be used in FIRE, AIR TCCs can only be used in AIR and IRIS TCCs can only be used in IRIS. You will need to apply for an IRIS TCC to file through IRIS.
How do you register multiple users that share the same TIN?	If you have an IRIS TCC, you do not need to reapply for a TCC each year. However, if you don't use your TCC for 3 consecutive years the TCC will be deleted, and you would need to reapply.
Is the file format for uploading transmittals with IRIS different then the FIRE system?	For registration questions, please refer to Publication 5903, IRIS Application for TCC Tutorial. If you have additional questions, please call the Help Desk. The file format used in IRIS is XML The file format used in FIRE is ASCII
Check List or how to guide to get transferred over from FIRE to IRIS	The IRIS June Working Group PowerPoint presentation provides a checklist for switching from FIRE to IRIS.
How can states that currently receive FIRE data request IRIS data going forward	The IRS combines data for participating states in one file that includes data from FIRE and IRIS.
We have been receiving the Combined CF/SF Program files through SDT (now using SLFT) since 2007. Once FIRE sunsets, will the IRS provide a new mechanism for states to receive CF/SF 1099 data? Possibly through IRIS directly?	
We do not have our TCC yet; is it possible to get an understanding of how similar or different the IRIS schemas are for the A2A transmission from the FIRE 1220 layout?	You need a Software developer IRIS TCC to access the IRIS schema in the SOR mailbox or be a Federal, State or Local Government Agency. Publication 5718 provides basic information on the schema, with details provided in the SOR package. The file format used in IRIS is XML The file format used in FIRE is ASCII



Working Group Resources





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

The screenshot shows the IRS Taxpayer Portal homepage. The top navigation bar includes links for Help, News, English, Charities & Nonprofits, and Tax Pros. Below the navigation is a search bar. The main content area is titled 'E-file information returns with IRIS' and lists various entity types. To the right, a box titled 'IRIS Taxpayer Portal hints' contains several troubleshooting tips, each with a blue plus sign icon. A blue arrow points from the 'E-file information returns with IRIS' section towards this hints box.

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 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 [\[PDF\]](#)
- IRIS Electronic Filing Application to Application (AEAI) Specifications, Publication 5718 [\[PDF\]](#)
- IRIS Test Package for Information Returns, Publication 5719 [\[PDF\]](#)

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 Liasons
Federal State Local Governments
Indian Tribal Governments
Tax Exempt Bonds

10 or more returns: E-filing now required
Starting tax year 2022, if you have 10 or more information returns, you must file them electronically. Find details on the [file 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 IRS 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
- Downloadoyer copies to distribute
- Keep a record of completed, filed and distributed forms
- Save and manage filer information

Get started

To use the IRIS Taxpayer Portal, you need an IRS 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 IRS Taxpayer Portal TCC](#)

Sign In

If you have an IRS TCC, [sign in to the IRS Taxpayer Portal](#).

[IRS Taxpayer Portal User Guide, Publication 5711](#)

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 IRS A2A to e-file thousands of returns (up to 100 MB at a time).

[Steps to use IRS A2A](#)

Publications
• [IRS Taxpayer Portal User Guide, Publication 5711](#)
• [IRS Electronic Filing Application to Application \(A2A\) Specifications, Publication 5710](#)
• [IRS Test Packets for Information Returns, Publication 5714](#)

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

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).
It can only be used

tion to software, you can use

ow 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](#)
- 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.

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

The IRS holds monthly working group meetings to provide updates and support for the Information Returns Intake System (IRIS). The meeting is for software

Annual Filing Season Program participants

developers, transmitters and state agencies interested in the IRIS Application to

Application (A2A) intake system.

Enrolled retirement plan agents

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

Certified Professional Employer

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	April 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	Filing Season update: Volume count Highest volume forms Future new forms for
Top flagged Business Rules.	Known Issues for the Taxpayer Portal: New issues Resolved issues	Known Issue Updates: A2A Taxpayer Portal	Future new forms for TY25/PY26
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	Current projects under review: FIRE retirement Templates PDF zip files and individual files
Updates/Useful Tips: Which role to select Status definitions Issuer Management	Resources Added WG Index to PowerPoint		TIN Matching
			Registration Questions



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 Issuer 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.**