



Information Returns Intake System (IRIS)

Working Group Meeting

Date: December 10, 2025





Agenda

- Welcome
- Updates
- Known Issues
- Available Resources

Mics and Chat have been muted.

Deck 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.



Updates



TY24/PY25 Shutdown/Cutover

IRIS Production

Taxpayer Portal and A2A for all transmissions

- Shutdown began on December 03, 2025, at 12:00 a.m. Eastern time.
- Please do not attempt to access the IRIS Production environment via the Application to Application (A2A) and/or Taxpayer Portal channels during the shutdown/cutover period.
- This includes corrections and replacements.
- Filing Season 2026/Tax Year 2025 will open **January 06, 2026**, at 9:00 a.m. Eastern time.
- Please monitor the IRIS Status page for any updates.

IRIS Assurance Testing System (ATS)

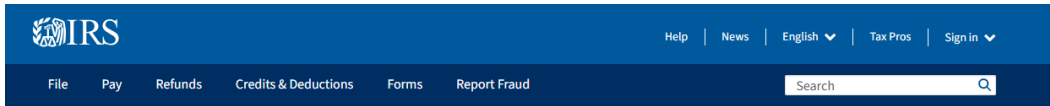
- The IRIS ATS environment is available now for TY25/PY26.

We apologize for any inconvenience this may cause.



Checking Operational Status

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)

The Information Returns Intake System (IRIS) system is a modernized system that receives information through two intake channels: IRIS Taxpayer Portal/UI and IRIS Application to Application (A2A).

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.

For system availability, [check IRIS status](#).

[Get solutions to known issues](#).

[IRIS 101: Introductory Presentation](#) [PDF](#) - You can access the introductory presentation that was shared during our IRIS 101 stakeholder call and walk through the necessary information to better understand the new IRIS Modernized System.

E-file through the IRIS Taxpayer Portal

This free, web-based filing system lets you:

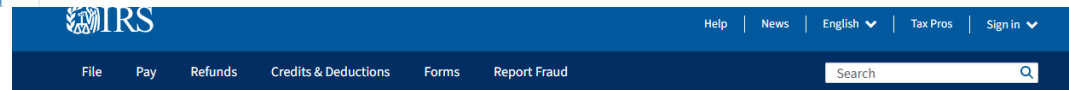
- E-file up to 100 returns at a time
- Enter manually or by .csv upload

Publications

- [IRIS Taxpayer Portal User Guide, Publication 5717](#) [PDF](#)
- [IRIS Electronic Filing Application to Application \(A2A\) Specifications, Publication 5718](#) [PDF](#)
- [IRIS Test Package for Information Returns, Publication 5719](#) [PDF](#)

Email updates

Get updates on issues, changes and working group meetings



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IRIS operational status

Enrolled agents

Annual Filing Season Program participants

Enrolled retirement plan agents

Certified Professional Employer Organization (CPEO)

EITC central

Enrolled actuaries

E-file providers

Modernized e-File

Modernized e-File status

Become an authorized e-file provider

Authorized IRS E-file Provider Locator Service

QuickAlerts

Check the operational status for the Information Returns Intake System (IRIS). This includes the Taxpayer Portal, Application to Application (A2A) and Assurance Testing System (ATS).

IRIS Production unavailable:

To prepare for Filing Season 2026/Tax Year 2025, the IRIS Production environment Shutdown/Cutover for all transmissions, including corrections and replacements, will begin on Wednesday, December 03, 2025, 12:00 a.m. Eastern time.

Please do not attempt to access the IRIS Production environment via the Application to Application (A2A) and/or Taxpayer Portal channels during the Shutdown/Cutover period.

The IRIS Production environment Start-up date/time will be announced via a QuickAlerts bulletin when available.

IRIS Taxpayer Portal

Not operational

IRIS A2A

Not operational

IRIS ATS

Operational



IRIS A2A ATS

IRIS Assurance Testing System (ATS) refers to the process used to test software and electronic transmissions prior to accepting forms into the IRIS A2A Production System.

- Software Developers/Issuers/Transmitters are required to test every year.
- Software Developers must pass IRIS ATS for the tax year(s) that the software package(s) will support.
- Issuers/Transmitters must pass a communication test.
- Example are located at www.irs.gov/IRISATS
- 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.



Maintaining your TCC Application

- Once you have completed the IRIS TCC Application process and received your TCC, it is important that you keep your account up-to-date. This includes:
 - Reviewing your TCC Application periodically.
 - Ensuring proper individuals are identified on the application.
 - Update as necessary by adding any new Responsible Officials or Contacts.
 - Updating any address changes needed - both business and mailing.

TIP: Log in and review during off peak times



Monitor your TCC

[e-services](#)[Online Tutorials](#)[Mailbox](#)[Modify PIN](#)[Profile](#)[Contact Us](#)

[External Services Authorization Management](#) > Application Summary

[Firm Information](#)[Application Details](#)[Software Packages](#)[Authorized Users](#)[Application
Comments](#)[Application
Summary](#)[Application
Submission](#)

Doing Business as Name: [REDACTED] EIN: [REDACTED]

Application Type: IRIS Application for TCC | Tracking Number: [REDACTED]

Application Status: Completed

Application Summary

[Print](#) | [Home](#)

Firm

Firm/Organization Legal Name:

Business Structure:

Business Address:

Business Address City/State/Postal Code:

Phone Number:

Mailing Address:

Mailing Address City/State/Postal Code:

Combined Federal/State Filing (CF/SF) Program Participant:

Firm Suitability Status:





Known Issues IRIS ATS





Acknowledgements

- IRIS A2A ATS was not returning test acknowledgements which includes the status when processing is complete.
- Status is showing as “Processing” past the established timeframe.
- If test transmissions were sent to be reviewed and are still showing a status of “Processing”, you will need to resubmit your test transmission/communication to be reviewed.



Form 1099-R

- Form 1099-R Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
- For TY2025 Box 7 added a new distribution code for:
 - Y= Qualified charitable distribution (QCD) claimed by taxpayer under section 408(d)(8).
- New code is not available in ATS for the following combinations:
 - JS
 - SJ



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.**
- **IRS is targeting the retirement of the Filing Information Returns Electronically (FIRE) system at the end of December 2026.**



Recurring Questions

- Correction Process for forms originally filed through FIRE
 - Until FIRE retires in 2027, corrections must be filed in the same system the original form was transmitted.
 - Guidance will be provided in a future working group.
 - Stay tuned for more information as it becomes available.

- FIRE file format vs IRIS file format
 - FIRE uses American Standard Code for Information Interchange (ASCII).
 - IRIS uses eXtensible Markup Language (XML).

- Will foreign filers have the ability to apply for an IRIS TCC?
 - More information for foreign entities will be provided in a future working group.

- Will all states that accept the CF/SF, accept the IRIS schema format when the IRIS forwards the records on to the state?
 - IRS combines data for participating states in one file that includes data from FIRE and IRIS. The CF/SF program will continue to make the files available to the states in the same format that is currently provided.
 - Additional information will be provided about CF/SF program in future IRIS Working Group Sessions.



Working Group Resources





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>
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



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)

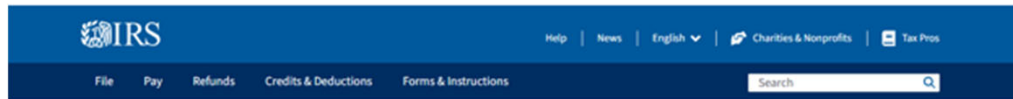
www.irs.gov/iris - a website that provides general information about IRIS

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



E-file information returns with IRIS

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.

Publications

- IRS Taxpayer Portal User Guide, Publication 5717 [PDF](#)
- IRS Electronic Filing Application to Application (A2A) Specifications, Publication 5718 [PDF](#)
- IRS 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](#)

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.

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.

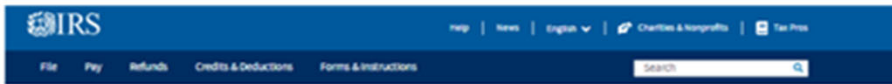
PDF downloads do not include a payer/issuer copy.

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



IRIS Working Group

www.IRS.gov/IRIS



Home / File / E-file Forms 1099 with 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, [sign in to the IRIS Taxpayer Portal](#).

[IRIS Taxpayer Portal User Guide, Publication 5717](#)

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 M8 at a time).

Steps to use IRIS A2A

Publications

- [IRIS Taxpayer Portal User Guide, Publication 5717](#)
- [IRIS Electronic Filing Application to Application \(A2A\) 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

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.

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Working group meetings

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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 101

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IRIS working group meetings and notes

Enrolled agents

Annual Filing Season Program participants

Enrolled retirement plan agents

Certified Professional Employer Organization (CPEO)

Enrolled actuaries

E-file providers

Modernized e-File

Modernized e-File status

Become an authorized e-file provider

Authorized IRS E-file Provider

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.

Join a meeting

[IRIS 101](#)

[August Working Group Meeting](#)

Get notified about IRIS

For email updates on IRIS, [subscribe to QuickAlerts for IRIS](#).

Meeting notes

View slides and questions and answers from meetings.

[IRIS 101 PowerPoint](#)

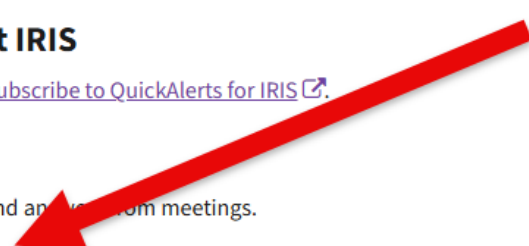
PDF

Related

[Information returns intake system](#)

[FAQs](#)

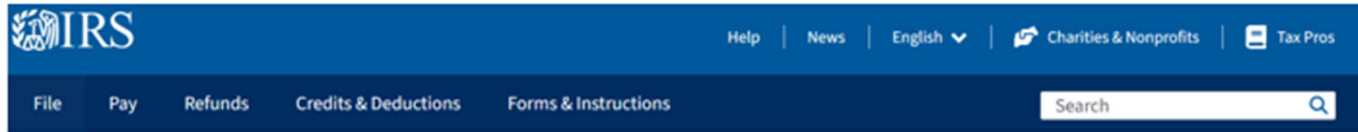
PDF





IRIS FAQs

www.irs.gov/IRIS



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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 (AZA) 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



IRIS Working Group Index

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QuickAlerts

Electronic filing options for business and self-employed taxpayers

Modernized e-File forms

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Meeting notes

View slides and questions and answers from meetings.

2025

[2025 IRIS Working Group PowerPoint index](#) PDF

• June 11, 2025

- [Slides](#) PDF
- [Q&As](#) PDF

• May 14, 2025

- [Slides](#) PDF
- [Q&As](#) PDF

• April 9, 2025

- [Slides](#) PDF
- [Q&As](#) PDF

2025 IRIS Working Group PowerPoint 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	

April 2025	May 2025	June 2025
Filing Season update: Volume count Highest volume forms	Filing Season Update: Volume count Highest volume forms	Filing Season Update: Volume count
Future new forms for TY25/PY26	Future new forms for TY25/PY26	Tips and Updates: Prior topics under review Future forms A2A corrections
Current projects under review: FIRE retirement CSV Templates PDF zip files and individual files	Topics under review (Updates)	Transition to IRIS: FIRE retirement Steps to transition to IRIS IRIS helpful hints
TIN Matching	Transition from FIRE to IRIS	Registration questions
Registration questions	Registration questions	