

A circular wreath of botanical illustrations surrounds a central white circle. The wreath includes various plants: a large red leaf, a green leaf with a white flower, a fern frond, a cluster of yellow flowers, a large green leaf, a red leaf, a purple flower, a green leaf with a white flower, a fern frond, and a cluster of small pink flowers. The central circle contains the text "September 2023" and "IRIS Enrollment" with a horizontal line below it.

September 2023

# IRIS Enrollment

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# What is it?

Information

Returns

Intake

System

Free taxpayer portal for electronic filing of 1099 forms.

# The Good Part



## Free

Zero Cost

## Forms

Printable & no 1096 is required

## Records

Basic validation is built in and IRS will acknowledge receipt

## Filing

Combined state/federal filing means one & done, no OKTap entry

## Corrections

Amending forms can also be done online

# The “Bad” Part

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## It's only for 1099s

- W2s/W3s must still be manually entered into OKTap and filed electronically via BSO

## Responsible Officials

- 2 responsible officials (RO) and 2 contacts are required for initial application
- Each RO must set-up an ID.me account (no exceptions)
- Each RO must electronically sign the application before submission can occur

## TCC Code Activation

- Processing of the initial application can take up to 45 days
- TCC code must be used at least once every 3 years to remain active



# Combined Federal/State Filing (CF/SF) Program

For 1099s filed through the IRIS program, you can choose to also submit forms to the state at the same time.

This reduces your workload and the chance of data entry errors.

1099 filing is done in one step, not two!\*



# Responsible Official

Has responsibility & authority for the district

- First point of contact for the IRS
- Can sign/revise the TCC application
- Can be listed as a contact on the application also

ROs will be

1. A district employee (i.e. district manager)
2. The district's Area District Coordinator



# A Contact



- Authorized to use the TCC to file 1099s electronically
- Contact point for IRS for questions regarding transmission/processing
- May be an RO

\*For initial application, the required two ROs and contacts will be identical

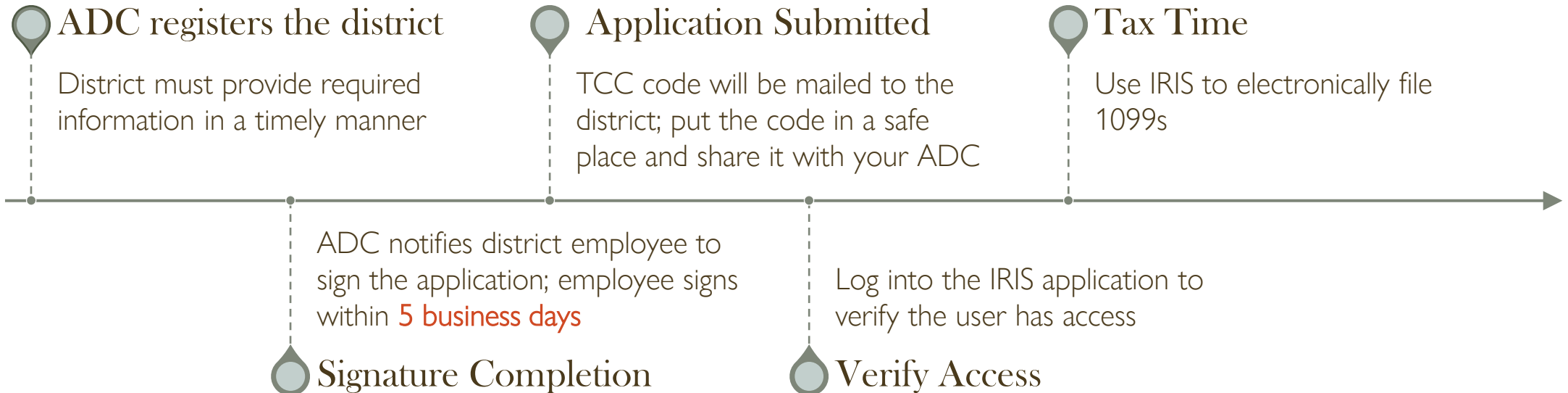


# Completing TCC Enrollment

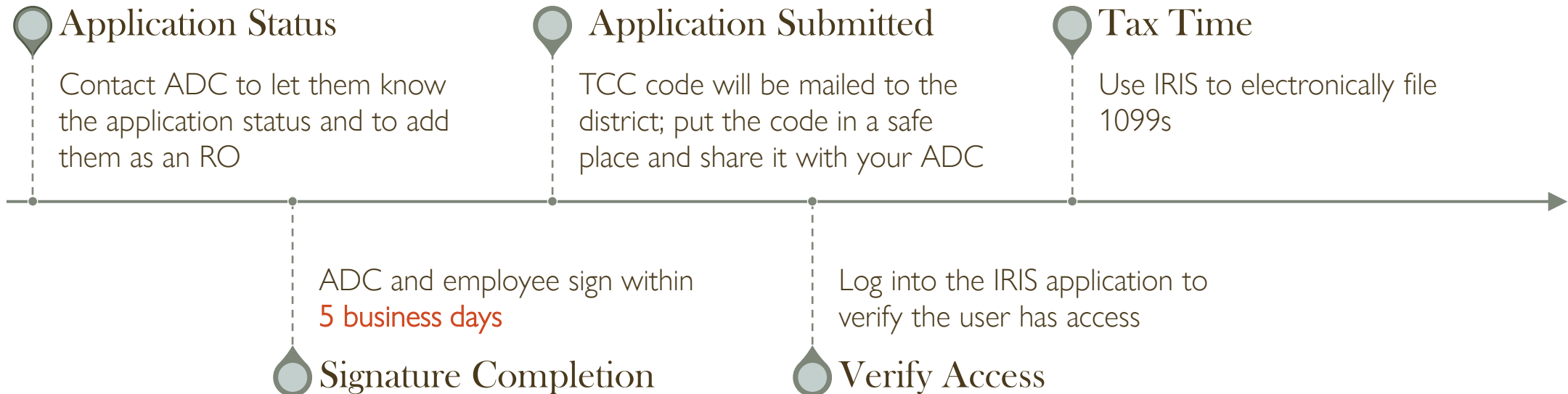
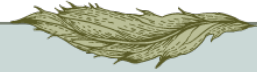




# TCC Request Is NOT Started



# TCC Request IS Started





If changes are made to the TCC application,  
all listed parties must electronically sign the  
document again.

No notifications are sent to the listed ROs for signatures.



# ID.me Account

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## No Account Yet?

- Wait for your ADC to contact you before beginning set-up
- You must set-up your account with your personal information, not your work information
- IRS E-services enrollment will occur at the same time

## Already have an Account?

- Verify that you have signed up for IRS E-services
- Registration involves accepting the terms & conditions and select your personal PIN

\*ADC may not be able to add a user who has an ID.me account but who is not signed up for E-services.

## Great, another account...

- Once completed, the ID.me account is yours (not the district's) and can be used across multiple platforms, including
- IRIS
- IRS
- BSO
- Social Security
- & others



# Reminders

## No more paper 1099 forms

- 10 or more 1099s = REQUIRED by IRS to file electronically
- 1 or more 1099s = REQUIRED by OCC to file electronically

## No Expenses

- Do not expend local funds to pay a preparer to complete 1099s or W2s
- IRIS and BSO are free services
- Filing tax forms is a duty of the district manager or administrative assistant

# Resources



- Your ADC
- [IRS website \(IRIS\)](#)
- [ID.me enrollment instructions](#)
- [IRIS portal user guide](#)

# Next Steps

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## Tax Time (December/January)

- Do not enter 1099s in the IRIS system until closer to tax time
- Training will be provided on use of the system

## Provide Information

- Answer the questions in the attendance form
- Provide information when requested by your ADC
- Electronic signatures on the application should be completed within **5 business days**

## Due Date

- **October 31**
- All districts should have a TCC application in submitted status
- May take up to 45 days to receive the TCC number



# October Training

October 10, 1:30 pm

October 12, 1:30 pm

Topic: Option Period Enrollment







Questions?

