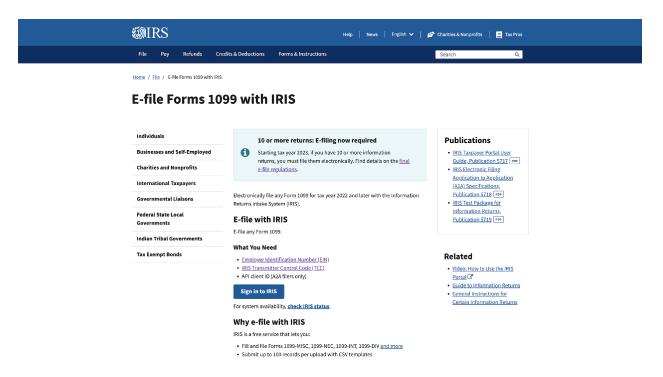


2023 IRIS Portal Application Guide

IRIS Portal Process and Validation

1. Click on Enrollment for the IRIS filing platform link



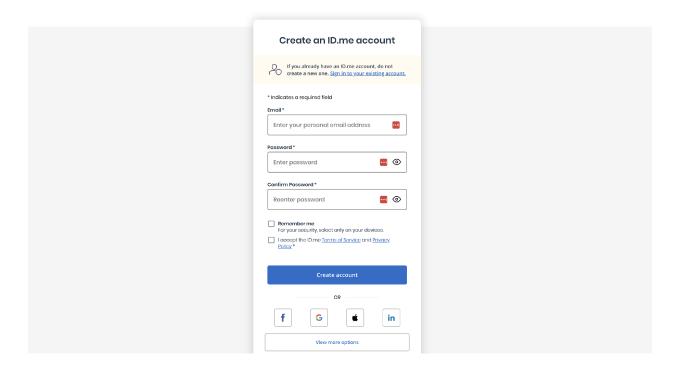
2. Click on Sign in to IRIS to register to ID.Me



Sign In or Create a New Account

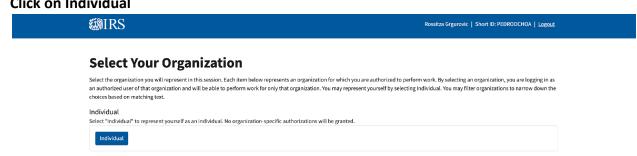
IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your privacy.
ID.me is an account created, maintained, and secured by a technology provider.
If you don't have an ID.me account, you must create a new account.
Sign in with an existing account Sign in with ID.me OR
Create a new account ID.me. Create an account
Frequently Asked Questions
① How do I verify my identity?
What if I can't verify my identity?
① What is ID.me?
This U.S. Government system is for authorized use only.
Farming: This system may contain private tax information. By using this system, you consent to the monitoring, recording, and reviewing of your activities in this system. You may only access this system using your own personal
nformation. Any other use of this system is an unauthorized use and is prohibited.
In authorized use violates Federal law and may result in criminal or civil penalties under these laws. Examples are penalties for knowingly or intentionally accessing a computer without authorization or exceeding authorized
access under 18 U.S.C. 1030, and penalties for the willful unauthorized access or inspection of taxpaver records under 26 U.S.C. 7213A and 26 U.S.C. 7431.

3. Click on Create an Account and follow the onscreen instructions.

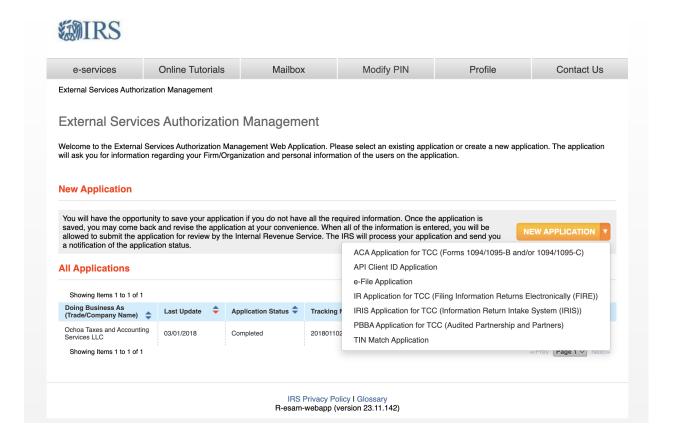


4. Log in to ID.Me

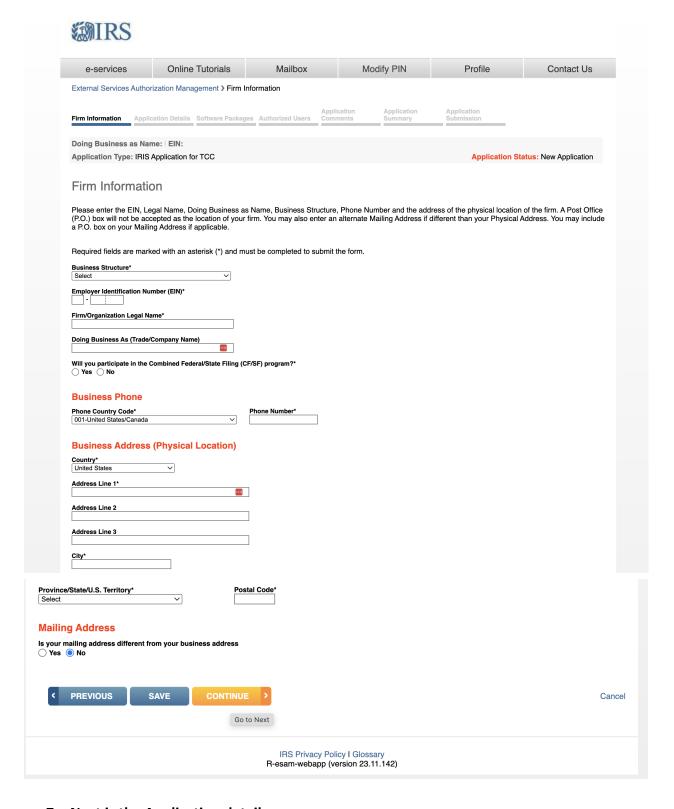
5. Click on Individual



After selecting 'Individual', the system will take you to the 'External Services Authorization Management (ESAM)' landing page. Click on the arrow next to 'New Application' and select 'IRIS Application for TCC'.



6. Next enter Company Information



7. Next is the Application detail page

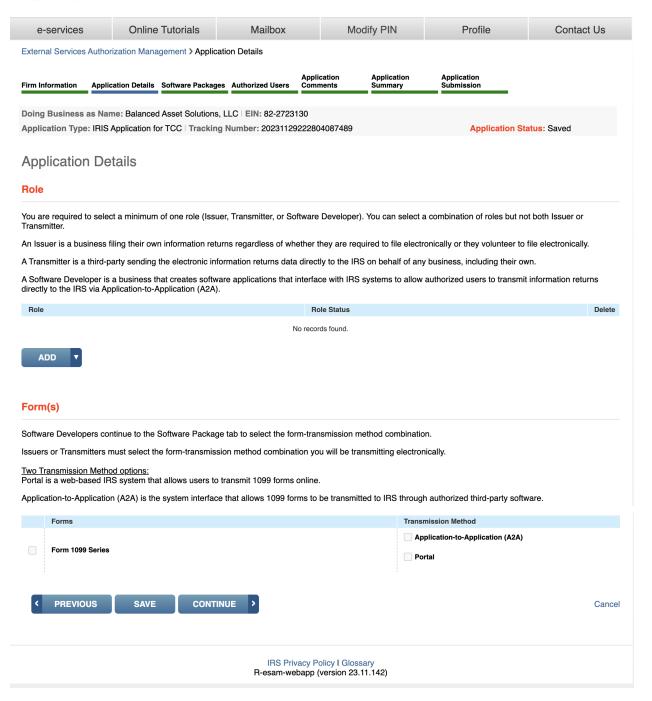
The roles are defined as:

- **Issuer** is a business filing their own information returns regardless of whether they are required to file electronically or volunteer to file electronically.
- **Transmitter** is a third-party sending the electronic information returns data directly to the IRS on behalf of any business, including their own.
- **Software Developer (SWD)** is a business that creates software applications that interface with IRS systems to allow authorized users to transmit information returns directly to the IRS via Application-to-Application (A2A). Not used with the Portal transmission method.

The transmission methods are defined as:

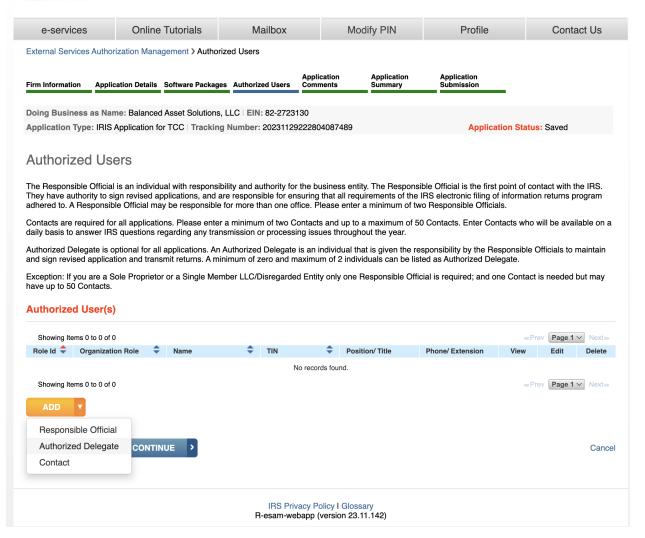
- **Application-to-Application (A2A)** is the system interface that allows forms to be transmitted in XML format to the IRS through authorized thirdparty software.
- **Portal** is a web-based IRS system that allows users to enter and transmit forms online. It is also known as the Taxpayer Portal.





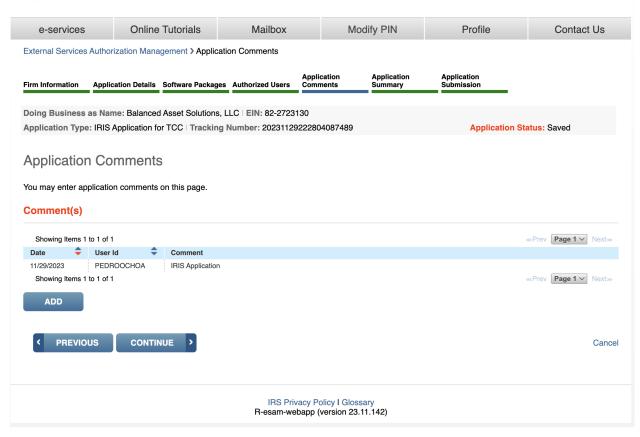
- 8. Role Click on Add and select issuer
- 9. Forms check Form 1099 Series and Application-to-Application (A2)
- 10. Click Continue
- 11. After you hit 'Continue' you will be in the software page click continue again
- 12. Authorized Users page





- 13. After adding the responsible parties and contact click continue
- 14. You will be on the Application Comments page



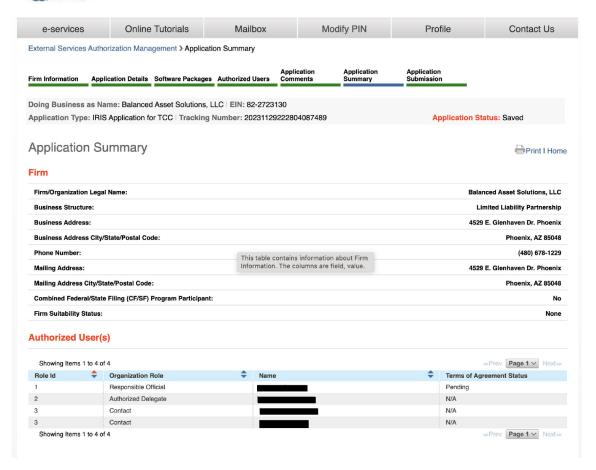


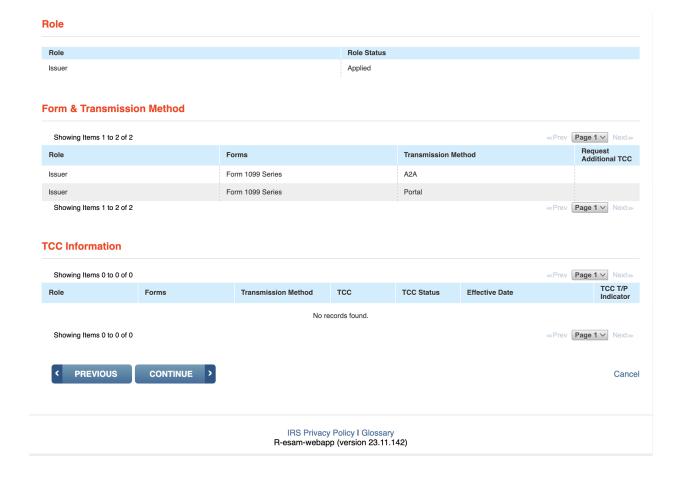
It is not mandatory you don't have to add a comment Click Continue

15. You will be at the application page

Provides a summary of information completed on the application. Verify all information is correct before selecting continue to complete the 'Application Submission' page. If information needs to be revised, use the toolbar along the top of the page to navigate to the appropriate page. Update the information and select 'Save'. Once the application is in 'Completed' status, the TCCs and/or Software IDs will be visible on this page.







16. Click Continue

17. You will be in the application submission page
Each Responsible Official must sign the 'Application Submission' page using their 5-digit
PIN. The 5 digit PIN is the number you created when you created the ID.Me account.
The application will be processed after all Responsible Officials have entered their PIN
and accepted the 'Terms of Agreement'.

After the last Responsible Official has completed the 'Application Submission' page, 'Application Status' displayed on the upper right will be 'Submitted Pending Review.'

(each Responsible Official must have to their own ID.Me account)

18. End



e-services Online Tutorials Mailbox Modify PIN Profile Contact Us

External Services Authorization Management > Application Submission and Terms of Agreement

Firm Information Application Details Software Packages Authorized Users Application Application Summary Submission

Doing Business as Name: Balanced Asset Solutions, LLC | EIN: 82-2723130

Application Type: IRIS Application for TCC | Tracking Number: 20231129222804087489 | Application Status: Saved

Application Submission and Terms of Agreement

You have completed the application process and all required information has been entered. You are now able to submit this application for review and approval by the IRS. This firm and employees will comply with the provisions of the Revenue Procedure for Electronic Filing of Individual Income Tax Returns, Business Tax Returns, and Information Returns, and related publications, for each year of our participation. Acceptance for participation is not transferable. I understand that if this firm is sold or its organizational structure changes, a new application must filed. I further understand that noncompliance will result in the firm and/or the individuals listed on this application, being suspended from participation in the IRS electronic filing programs. I am authorized to make and sign this statement on behalf of the firm.

IRIS-TCC Application Privacy Act and Paper Reduction Act Notice

The authority for requesting this information is Internal Revenue Code sections 7801, 6011(f) and 6109. The primary purpose of requesting the information is to identify you and identify your fitness to transmit returns using the Information Return Intake System (IRIS). Your response is mandatory if you are required to file returns electronically. If you do not provide all or part of the information, we may not be able to process your application; providing false or fraudulent information may subject you to penalties. We may give this information to the Department of Justice for use in civil and/or criminal litigation, to the public to help identify approved electronically filing practitioners, and to cities, states, the District of Columbia, and U.S. Commonwealths and possessions for use in administering their tax laws. We may also disclose this information to the other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, and to federal law enforcement and intelligence agencies to combat terrorism.

Terms of Agreement

Under penalties of perjury, I declare that I have examined this document, including any accompanying statements, and, to the best of my knowledge and belief, it is true, correct, and complete. Please enter your PIN to accept the terms for this application. Your PIN is your electronic signature that you selected when you registered for an eServices account.

The required field is indicated with an asterisk (*). All required fields on previous pages need to be filled out.