

Secure Data Transfer

Rod Sterling
Internal Revenue Service
Washington DC

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Main Topics

- Status of SDT Operations
 - Agency & program migration
 - Will media still be used?
- Procedures for sending files to IRS
- SDT account maintenance
- Communication & Customer Support

SDT Description

- File transfer system only
- Independent of file creation & content
- Independent of data usage & storage
- It's like the moving company

Agency Migration

June 06: OMB Directive

April 07: tested SDT delivery of files

May – Sept 07: migration of GLDEP agencies
& files to outgoing SDT

Oct – Dec 07: fine tuning

Jan – Aug 08: sought authority for incoming

Sept – Dec 08: tested incoming SDT

Feb – July 09: agency migration to incoming

Program Migration

- **GLDEP** files except EOAD using SDT
 - Outgoing & Incoming (as of 8-1-09)
- **EOAD** – encrypted CD until further notice
- State Income Tax Levy Program (**SITLP**)
 - Migrated to SDT as of 8-1-09
- Abusive Transaction data (**AT MOU**)
 - Moving to SDT with August 09 file
- State Audit Report Program (**SARP**)
 - Testing complete – working details
- Other programs migrated in near future

Will Media Still Be Used?

- IRS no longer sends unencrypted media
 - no 36-track tape cartridges
- SDT is preferred method of file transfer
- SDT used for established recurring programs
- Some programs still to be migrated to SDT
- Encrypted media (CD) will remain in use for test programs, 1-time transfers, exceptions

Sending files to IRS

- Upload files to SDT server
- Immediate confirmation of receipt sent to group e-mail address
- Most uploads will be 2 files: data file & control file
- You will be contacted regarding errors
 - Misnamed file
 - No control file

Misnamed Incoming Files

- Use file names provided by IRS
- Incorrect file names “kick out” of system
- File names must begin with **SS###**
 - **SS** = 2-digit State abbrev.
 - **###** = 3-digit numeric agency code
- Send file name questions to local GL or “program office contact”

Account Maintenance Software

- No action required by state to stay current
- IRS has a group license for Tumbleweed's SecureTransport Software used for SDT
- IRS pays all software costs including upgrades & maintenance

Account Maintenance User Authentication

- User Authentication: IRS is using Identrust Digital Certificates to authenticate users
- States are responsible for costs including bi-annual renewals
 - Certificates cost is \$119.00
 - 30-20-10 day notification to renew
 - IRS recommends that each agency have at least 2 certificate holders

Account Maintenance Customer Contact

- Each state agency has provided IRS with a group e-mail address
 - File delivery notification
 - Confirmation that file has uploaded
- Be sure to include appropriate people
- Keep group e-mail current by sending name changes to SDT Help Desk at sdthelp@irs.gov

IRS Communication to States & Municipalities

- Local GL is primary contact by design but you will hear from others
- New monthly message from local GL
- Messages from program offices – e.g. SITLP
- Messages on FTA Data Exchange listserv
- Information on TaxExchange web site

Customer Support

- Local GL is primary contact
- SDT Help Desk
 - File transfer questions
 - Changes to SDT account
- Other designated contacts:
program office, Safeguards, TIGTA

Customer Support

Contact Your **Local GL** for

- Questions on file names
- Spec Book Questions
- Extract delivery schedules
- Tickler file due dates
- File content (data elements)

Customer Support

Contact the **SDT Help Desk** for

- Slow transmission speed
- Request to have a file zipped
- Request for retransmission
 - Incomplete or illegible file
- SDT account issues – e.g., change in group e-mail names

SDT Help Desk: sdthelp@irs.gov

What's Next

- Migration of remaining established projects to SDT
- Revised SDT Trading Partner Handbook – target date 9-30-09

- This presentation will be available on the FTA web site
- Question on this presentation may be sent to Rod Sterling at Robert.J.Sterling@irs.gov

Questions?



Thank You