

# Secure Data Transfer

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# Main Topics

- IRS Organization
- SDT Operations
- Account Maintenance
- Communication & Outreach
- Customer Support

# IRS Organization

## Gov't Liaison & Disclosure (GLD)

- Disclosure
- Safeguards
- Gov't Liaison (HQ & Field)
- GLD Data Services

# IRS Organization

- SDT is operated by IRS IT
- Outreach & Education – GLD
- Not part of ETA / e-filing
- Other program offices

# SDT Operations

- Performing as intended
- Internal infrastructure upgraded
- Internet connection upgraded 50%
- Throughput significantly improved during business hours

# SDT Operations

- Project migration since Aug 09
  - AT MOU (formerly ATAT)
  - EOAD (IRS Audit Reports)
  - SARP (State Audit Reports)
  - *Soon:* Estate Closing Letters

# Estate Closing Letters

- IRS provides data to 35 states
- Currently using CD & paper docs
- States notified prior to first SDT distribution
- Once converted, no more CD or paper

# Account Maintenance

- Software licenses
- User Authentication
- SDT Participation Agreements
- State/City agency group email

# Software Licenses

- TW SecureTransport license
- IRS pays all costs for states
- IRS considering site license  
(to cover all new accounts)

# User Authentication

- Identrust Digital Certificates
- States responsible for costs
- ***IMPORTANT: Do not let certs expire***
- ID requirements have changed
- <http://www.identrust.com/irs/sdt/>

# Participation Agreement

- Revised Participation “Statement”
- No signature requirement
- Attachment to GLDEP annual enrollment
- No need for agencies to re-sign
- **Effective August 3, 2010**

# Agency Group Email

- Used for automated notifications
- Agency decides who's in group
- Liaisons with IRS
- Agency Disclosure Officer
- Identrust certificate-holders
- Agency keeps list & address current
- Changes sent to SDT Customer Support

# Outreach & Education

- Automated Notifications
- SDT Monthly Updates
- FTA's TaxExchange
- GLD Web Portal

# Automated Notifications

- **File Delivery Notification (FDN)**
- **Successful Agency Download Notification**
- **Successful Agency Upload Notification**
- **Incorrectly-Named File Notification**
- **Control File Needed Notification**

# File Delivery Notification

**From:** SecureDataTransfer@irs.gov  
**Sent:** Thursday, September 03, 2009 2:18 PM  
**To:** MN141@notes.mdor.state.mn.us  
**Subject:** IRS Updates have been received

Dear SDT Customer,

The following files named PDBRM.B47070.FMN141.X200935.txt(FEIN extract) and PDBRM.B47070.FMN141.X200935.cntl.txt(FEIN control) are available for download.

Please login to Secure Data Transfer to download your data.

The files will be deleted from the server in 10 days based on today's date of 09/03/2009.

Thank you,  
SDT Staff

This is an automated email. Please do not reply to this message.

If you have problems downloading the file, please contact the SDT Help Desk, [sdthelp@irs.gov](mailto:sdthelp@irs.gov).

# Successful Agency Download

**From:** SecureTransport@irs.gov

**Sent:** Friday, September 04, 2009 7:43 PM

**To:** MN141@notes.mdor.state.mn.us

**Subject:** IRS File Download Notification



**PDIEY.I80785.FMN141.X200934.txt has been downloaded by  
your system from the IRS  
Secure Data Transfer server.**

**Thank you for using IRS Secure Data Transfer.**

**Please keep this message for future reference.**

# Incorrectly-Named File

The IRS has received a file named SS###IMFIRTFZIP2010XX.txt.txt uploaded through SDT (Tumbleweed) on 08/02/2010 from your agency (SS###) that did not follow the proper naming conventions.

The file has been removed/deleted from the SDT server and will need to be resubmitted with the correct file name. If you have any questions please contact your designated IRS Point of Contact for your project for the correct file name.

Please check your folder for any additional files named incorrectly.

Thank you,  
SDT/EFTU Staff

This is an automated email. Please do not reply to this message.

# SDT Monthly Updates

- Issued at beginning of month
- Sent through local GL
- Sent through FTA extract listserv:  
[irsextract@lists.taxadmin.org](mailto:irsextract@lists.taxadmin.org)
- Posted to FTA's TaxExchange site

# SDT Monthly Updates

How to subscribe to updates:

- Go to the FTA web site at:  
<http://www.taxadmin.org/fta/lists>
- Enter your name & e-mail address
- Under Action, choose SUBSCRIBE
- Under Listserv, choose IRS Extract Listserv

# TaxExchange

- <http://www.taxexchange.org>
- Click on IRS/Federal agencies
- Click on Data Exchange  
IRS extract listserv
- List of Monthly Updates &  
other relevant documents

## IRS Secure Data Transfer (Tumbleweed) Information

[SDT Monthly Update March 10](#)

[SDT Monthly Update February 10](#)

[SDT Monthly Update December 09 - Addendum](#)

[SDT Monthly Update December 09](#)

[SDT Monthly Update November 09](#)

[SDT Customer Support Procedures for Federal, State & Municipal Agencies  
\(rev. 11-1-09\)](#)

[SDT Trading Partner Handbook \(for FedState Trading Partners\) version  
TPH FS 09-001 \(rev. 12-15-09\)](#)

[SDT Agency Codes \(rev. 12-15-09\)](#)

A list of SDT Agency Codes, also known as SDT User ID's.

[SDT FAQ List \(rev. 10-9-09\)](#)

A list of the most Frequently Asked Questions (FAQ) about SDT.

[2010 Incoming File Name List for GLDEP and SRFMI Files \(rev. 3-4-10\)](#)

This list contains file names for GLDEP and SRFMI files due to IRS through  
December 31, 2010.

# Web Portal

- An **ATTEMPT** to develop a portal
- Need buy-in from stakeholders
- Hosted on the IRS RUP
  - Registration, login, shared secrets
  - Encrypted from user to portal
- Spec books, monthly updates, agency code list, etc.

# Customer Support

- Procedures effective Nov 2009
  - On TaxExchange
  - In SDT Handbook
- For technical file transfer issues
- For changes to group email
- Not for program or safeguard issues

# Customer Support

- Email to Enterprise Help Desk
- 3 simple steps
  1. Create email w/designated subject line
  2. Complete info items 1-7
  3. Send email to  
**[MITSEUES.enterprise.service.desk@irs.gov](mailto:MITSEUES.enterprise.service.desk@irs.gov)**

# Customer Support

1. Customer Directory Record: **CD62946**
2. Last Name: **STATE**
3. First Name: **AGENCY**
4. SDT Agency Code (SS###)
5. State the question / describe the issue
6. IRS **File** Name (if applicable)
7. Requestor's Name & Contact Info

## File Name vs. Project Name

- F/N: **PDBRM.B47070.FMN141.X200935.txt**
- Project Name: FEIN extract file
- F/N: **PDBRM.B47070.FMN141.X200935.cntl.txt**
- Project Name: FEIN extract control file
- F/N: **PDIXY.I80785.FMO243.S200947.txt**
- Project Name: IMF SSN extract

# Questions?

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