

IRS announces upcoming IDES testing session and IDES web page updates

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Global Financial Services Industry



IRS announces upcoming International Data Exchange Service (“IDES”) testing session and web page updates

On May 20, 2015, the IRS announced the next IDES testing session, opening June 1, 2015, at 12:00 p.m. EDT and closing June 8, 2015, at 12:00 p.m. EDT. When participating in the session, the IRS noted that only test data should be submitted, and files containing production data or personally identifiable information will not be processed.

The session is open to users that have completed enrollment by May 28 at 5:00 p.m. EDT. As the deadline for 2014 FATCA reporting to the IRS is due June 29, 2015, users are advised to complete enrollment as soon as possible.

- Complete enrollment on the [IDES Enrollment Site](#) using an IRS-issued GIIN, FIN, or HCTA Entity ID and valid certificate from an approved certificate authority.
- Visit the [IDES Resources](#) web page for more information on enrollment.

IDES web page updates

The IRS also updated the content on the [IDES Resources](#), [FATCA XML Schema Recommendations for DocRefID](#), and the [IDES Technical FAQs](#) web pages. Consult these pages for general and technical IDES information and support.

- The IDES Resources page provides links to information on IDES enrollment and FATCA report preparation and submission.

- The FATCA XML Schema Recommendations for DocRefID page provides best practices for Form 8966 DocRefID generation, which is a unique document identifier that must be attached to each account report and pool report.
- The IDES Technical FAQs page provides solutions to common technical issues with IDES.

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