SDT / Security Summit

FTA Tech Conference

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Main Points

- SDT status
- Security Summit File Transfers
- Customer Support

SDT Status

- TIGTA recommendation: enforce policy to encrypt data transmissions end-to-end
- Upgrades made to SDT on short notice
- Anticipate no impact for most customers

SDT Connection Options

- There are a variety of client-protocol options available to connect to SDT
- Each customer's OS and configuration is unique and requires a unique solution
- IRS recommends Axway's SecureClient and provides it free of charge
- Need help? Submit a customer support request

User Authentication

- SDT uses digital certificates
  - Not transferrable
  - Must be kept active (*do not let expire*)
- 2 choices:
  - ACES issued by Identrust
  - Self-generated SSH key pair

User Authentication

ACES

- Cost: $119 for 2 years
- Download cert onto your device
- Export public key to IRS
- HTTPS protocol
- Faster download
- Renew key every 2 yrs.

Self-gen SSH key pair

- Cost: no cost
- Download cert onto your device
- Export public key to IRS
- SFTP protocol
- Slower download
- Renew key every 2 yrs.

- *Axway SecureClient uses both*

Security Summit

- Objective: to protect taxpayers from identity theft and refund fraud
- Participants include:
  - ✓ IRS
  - ✓ States
  - ✓ Industry Partners

Summit File Transfers

- Suspicious Lead Files
  - ✓ Weekly/monthly (depending on time of year)
  - ✓ From Industry to IRS and States
  - ✓ One copy for IRS
  - ✓ Another identical copy for states (process referred to as the conduit)

Summit File Transfers

- Feedback Reports
  - ✓ IRS feedback reports to individual industry partners monthly via SDT
  - ✓ States may send feedback reports to individual industry partners but must use their own secure system of transmission (not set up on SDT)

Summit File Transfers

- Confirmed IDT Cases
  - ✓ Lists of TP's and preparers with confirmed indicator of fraud or suspicious activity
  - ✓ IRS produces one file at year end
  - ✓ Entire file goes to states via SDT (all records)
  - ✓ Each return transmitter receives only their own records via SDT (file sorted by transmitter)

Financial Institutions

- Additional financial institutions will be added to the SDT communications loop for future file sharing needs

- Part of Financial Services Workgroup

Customer Support

Two Main Options

- Local Governmental Liaison (GL)

- SDT Enterprise Help Desk

➢ _Note:_ _in some instances, you may contact a project office directly_

Customer Support

Step 1: Create email w/subject line:
SDT Customer Support Request from #####

Step 2: Include the following in the email:
- SDT Agency Code (#####):
- State the question or describe the issue:
- IRS File Name (if applicable):
- Requestor's Name, phone number and email address:

Note to IRS ESD: Please attach this email to the KISAM ticket and assign to "EOPS-ECC-OSB-FTS-SDT"

Step 3: Send email to: **it-uns.enterprise.service.desk@irs.gov**

Questions

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