



**New York State
Personal Income Tax
Modernized e-File (MeF)
Guide for Software Developers
For
Tax Year 2012**

The information presented is current as of this publication's print date.
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Introduction

The New York State Department of Taxation and Finance (*NYS DTF* or *Tax Department*) is participating in the Fed/State Modernized e-File (MeF) program, under the IRS Modernized e-File architecture. NYS DTF is supporting New York State personal income tax (PIT) Form IT-201, *Resident Income Tax Return*, Form IT-203, *Nonresident and Part-Year Resident Income Tax Return*, and Form IT-370, *Application for Automatic Six-Month Extension of Time to File for Individuals*. Also, Forms IT-214, *Claim for Real Property Tax Credit*, and NYC-210, *Claim for New York City School Tax Credit*, can now be e-filed as “standalone” forms, without accompanying a Form IT-201 or IT-203. A list of all forms accepted is on [page 8](#).

E-filed returns are accepted for tax years 2012 and 2011 only.

Electronic Return Originators (EROs) authorized by the IRS to e-file federal personal income tax returns are also authorized to e-file NYS personal income tax returns with NYS DTF. EROs are not required to submit a separate application for NYS e-file or provide copies of their IRS acceptance letters to NYS DTF.

All participants in the NYS program must comply with the procedures, requirements, and specifications in IRS Publications; 3112, IRS Publication 4164, [IRS Publications](#) as well as [NYS Publication 93](#), *New York State Personal Income Tax E-File Guide for Return Preparers for Tax Year 2012*.

Publication 3112 provides software developers with the technical information necessary for creating, formatting, and transmitting New York State (NYS) Modernized e-File (MeF) personal income tax (PIT) returns through the Federal/State 1040 MeF e-file program. This publication should be used in conjunction with NYS Publication 93 and IRS Publication 1436, Test package for Electronic Filers of Individual Income Tax Return for Tax Year 2011 and IRS Publication 4164, *Modernized e-File Guide for Software Developers and Transmitters*, and Publication 98, *New York State [Test Package](#) for Software Developers for NYS PIT MeF - Tax Year 2012*.

To contact the New York State PIT MeF team, e-mail: ELF-TSRD@tax.ny.gov

New for Tax Year 2012 (TY2012)

- The personal income tax e-file schema is available at:
http://www.tax.ny.gov/bus/efile/swd_income.htm
- PIT e-file acknowledgement acceptance and reject codes are available at:
http://www.tax.ny.gov/bus/efile/swd_income.htm
- All software must support electronic filing of returns under the NYS Marriage Equality Act (MEA)
- Form IT-201, *Resident Income Tax Return*, and Form IT-203, *Nonresident and Part-Year Resident Income Tax Return*, have changes to them. [NYS Forms](#) These changes include the following:
 - Dependents are now listed with their information on page 1 of these returns.
 - itemized deductions are no longer included directly on the primary form; itemized deductions are now listed on a new attachment Form IT-201-D or IT-203-D
 - whole dollar amounts are now required on personal income tax forms
 - foreign bank account information is required on Forms IT-201 and IT-203
 - a penalty and interest line has been added to Forms IT-201 and IT-203

- All software must support the NYS debit card refund option.
- NYS will allow a [perfection period](#) for rejected submissions.
- Bank accounts must be identified as:
 - personal checking
 - personal savings
 - business checking, or
 - business savings
- The NYS e-file mandate has changed. More information is available at: http://www.tax.ny.gov/tp/efile/tp_busn_mandate.htm
- Partial payments can now be made on a tax return or extension.
- Forms IT-214 and NYC-210 can now be e-filed as “standalone” forms, without accompanying a Form IT-201 or IT-203.
- The following new forms can be e-filed:
 - IT-634, *Empire State Jobs Retention Program Credit*
 - IT-635, *New York Youth Works Tax Credit*
 - IT-636, *Beer Production Credit*
- NYS will accept e-filed returns for tax years 2012 and 2011.
- Amended returns are not accepted.
- Most special condition codes can now be e-filed (see details in Publication 93).

Software Developers of consumer products

E-file mandate

Software Developers must display the following information to users during the preparation of a return or extension:

Most taxpayers must electronically file their 2013 New York State personal income tax returns and extensions. There's no additional charge to you for e-Filing this form. For more information, visit the New York State Tax Department Web site at: www.tax.ny.gov/pit/efile/elf_individual.htm

However, you are not required to display the e-file mandate message to a user if you can determine that your software does not support the electronic filing of the specific return or extension being filed.

Debit card refund

Software Developers must display the following information to users during the preparation of a return:

You can get your tax refund on a debit card issued by New York State. Debit cards allow you to:

- avoid check cashing fees
- get cash at banks and ATMs
- make purchases (and get cash back)

In most cases, there's no fee for using the card. For more information, visit the New York State Tax Department Web site at: [Debit Card Information](#)

For personal income tax returns you are only required to display the debit card language if the filer chooses to receive a paper check for their NYS tax refund. In the alternative, you can display the message to all users who are requesting a NYS refund.

Email

Software Developers must display the following information to users during the preparation of a return or extension:

The New York State Tax Department is expanding its services to include email notifications to taxpayers about their personal tax accounts. Enter your email address and the Tax Department will send you more information, or visit the New York State Tax Department Web site:
<http://www.tax.ny.gov/>

You do not need to document your compliance with this requirement for e-file approval. However, you may be required to provide that documentation after your software is approved.

Marriage Equality Act (MEA)

All Software Developers must support electronic filing of NYS MEA returns.

The Marriage Equality Act (Act) took effect on July 24, 2011, and provides that all marriages, whether between same-sex couples or different-sex couples, will be treated equally under the laws of New York. For more information, go to the NYSDTF Web site:
http://www.tax.ny.gov/pit/marriage_equality_act.htm

Software Developers of products for tax professionals

Software Developers must provide the following information to their tax professional users. These messages must be provided in a manner that ensures that the user will see it at least once at the start of the filing season.

All return filers must:

Include the following paid preparer information on all paper and electronically filed returns, if applicable:

- Complete the following paid preparer information, if applicable:
 - Preparer's name
 - Firm's name
 - Checkbox for self-employed preparers
 - Address
 - Preparer's NYTPRIN
 - Preparer's PTIN
 - Firm's EIN
 - Preparer's signature

NYS e-file mandate changes for returns filed on or after January 1, 2012

For the most current information on the e-file mandate for Tax Professionals, visit the Tax Department's Web site: http://www.tax.ny.gov/tp/efile/tp_busn_mandate.htm

If you don't file and pay electronically when required to do so, the New York State Tax Department can impose penalties on the preparer.

NYS Tax Department expanded email services for individual income tax filers

The New York State Tax Department has expanded its services to include email notifications to taxpayers about their personal tax accounts. Visit the New York State Tax Department's Web site: <http://www.tax.ny.gov/> for information on how to sign up for email alerts.

You do not need to document your compliance with this requirement for e-file approval. However, you may be required to provide that documentation after your software is approved.

Forms accepted for New York State e-file

NYS form #	Form title	Max #
IT-370	Application for Automatic Extension of Time to File for Individuals	1
IT-201	Resident Income Tax Return	1
IT-201-ATT	Other Tax Credits and Taxes	1
IT-201-D	Resident Itemized Deduction Schedule	1
IT-203	Nonresident and Part-Year Resident Income Tax Return	1
IT-203-D	Nonresident and Part-Year Resident Itemized Deduction Schedule	1
IT-203-C	Nonresident or Part-Year Resident Spouse's Certification	1
IT-203-ATT	Other Tax Credits and Taxes	1
IT-203-B	Schedule A, Allocation of Wage and Salary Income to NYS	99
IT-203-B	Schedule B-C, Living Quarters; College Tuition Itemized Deduction	99

NYS form #	Form title	Max #
	Worksheet	
IT-112.1	NYS Resident Credit Against Separate Tax on Lump-Sum Distributions	99
IT-112-C	New York State Resident Credit for Taxes Paid to a Province of Canada	99
IT-112-R	New York State Resident Credit	99
IT-135	Sales and Use Tax Report for Purchases of Items Costing > \$25,000	99
IT-182	Passive Activity Loss Limitations	1
IT-209	Claim for Noncustodial Parent Earned Income Credit	1
IT-212	Investment Credit	99
IT-212-ATT	Claim for Historic Barn Rehabilitation Credit and Employment Incentive Credit	99
IT-213	Claim for Empire State Child Tax Credit	1
IT-214	Claim for Real Property Tax Credit for Homeowners and Renters	1
IT-215	Claim for Earned Income	1
IT-216	Claim for Child and Dependent Care Credit	1
IT-217	Claim for Farmers' School Tax Credit	1
IT-219	Credit for New York City Unincorporated Business Tax	99
IT-220	Minimum Income Tax	1
IT-230	Separate Tax on Lump-Sum Distributions	99
IT-241	Claim for Clean Heating Fuel Credit	1
IT-245	Claim for Volunteer Firefighters' and Ambulance Workers' Credit	1
IT-249	Claim for Long-Term Care Insurance Credit	99
IT-250	Claim for Credit for Purchase of an Automated External Defibrillator	99
IT-255	Claim for Solar Electric Generating Equipment Credit	99
IT-256	Claim for Special Additional Mortgage Recording Tax Credit	99
IT-257	Claim of Right Credit	99
IT-258	Claim for Nursing Home Assessment Credit	99
IT-272	Claim for College Tuition Credit for New York State Residents	1
IT-280	Nonobligated Spouse Allocation	1
IT-360.1	Change of City Resident Status	2
IT-398	New York State Depreciation Schedule for IRC Section 168(k) Property	1
IT-399	New York State Depreciation Schedule	99
IT-634	Empire State Jobs Retention Program Credit	1
IT-635	New York Youth Works Tax Credit	1
IT-636	Beer Production Credit	1
IT-2105.9	Underpayment of Estimated Income Tax by Individuals and Fiduciaries	1
Y-203	Yonkers Nonresident Earnings Tax Return	99

NYS form #	Form title	Max #
NYC-210	Claim for New York City School Tax Credit	1
NYS W-2G	New York State Report of Certain Gambling Winnings	99
1099-G	Certain Government Payments (unemployment)	2
1099-MISC	Miscellaneous Income	99

Notes:

- NYS created the New York State Report of Certain Gambling Winnings (NYSW2G) to capture information from the federal W-2G and any associated NYS, NYC/Yonkers tax withheld.
- NYS supports both Forms 1099-MISC and 1099-G for electronic filing, even though the IRS does not. If New York taxes were withheld on the income reported on Forms 1099-MISC and 1099-G, then you must key the data from those forms into your software so it is included in the electronic return data when the New York return is e-filed.
- If you attempt to file a Form 1099-G with a NYS tax return for income other than that from the NYS Department of Labor, the return filing will be rejected.
- In the Schema, many forms are set as unlimited occurrences. This is because the Schema does not check the filing validation. Filing validity will be checked after Schema Validation.
- Standalone Form NYC-210, *Claim for New York City School Tax Credit*, **must** be filed as a standalone form.
- Form IT-214, *Claim for Real Property Tax Credit*, can either be e-filed as a standalone form (if the taxpayer is not required to file a return) or e-filed with a Form IT-201 or IT-203.

Federal forms included in the NYSDTF Schema:

- Schedule C
- Schedule C-EZ
- Form W-2
- Form 1099-R
- Form 6198

NYS forms based on IRS forms

The NYS W-2G and the 1099-MISC are state-specific and do not use the IRS field names. These forms require 2 additional fields for local withholding.

Federal forms required in federal XML format

The following federal forms may be required to complete the NYS return. The XML for these forms should be included in the federal XML file included in the transmission zip file.

- Schedule D

- Schedule E
- Schedule F
- Form 1116
- Form 4562
- Form 4797
- Form 4972
- Form 8582
- Form 8582CR
- Form 8829

In the alternative, NYS will accept a complete copy of the federal return. Whether you provide only the required forms or the complete copy of the federal return, the federal XML must be submitted in a separate zip entry (file folder) in the same message container as specified by the IRS and the TIGERS standard. Do not include the federal return as a PDF attachment.

Tax Year 2012 PIT MeF calendar

NYS PIT MeF TY 2012 Schema published	September 25, 2012
NYS PIT MeF test returns posted	November, 2012
NYS PIT MeF Software Testing Period	November 5, 2012 through IRS shutdown
NYS PIT MeF return acceptance period	January 30, 2013 through IRS shutdown

For PIT MeF testing, see Publication 98, *New York State Personal Income Tax MeF Test Package for Software Developers for Tax Year 2012*.

All prescribed due dates for filing of returns apply to e-filed returns.

Note: NYS uses the same e-file end date as the IRS.

Calendar and fiscal year filings

NYS DTF is only accepting calendar year filers for PIT MeF TY2011 and TY2012. Fields *LIAB_PRD_BEG_DT* and *LIAB_PRD_END_DT* should always be “2012-01-01” and “2012-12-31” for Tax Year 2012; and fields *LIAB_PRD_BEG_DT* and *LIAB_PRD_END_DT* should always be “2011-01-01” and “2011-12-31” for Tax Year 2011.

PIT MEF multiple year filings:

PIT MeF will progressively accept multiple years’ returns from Tax Year 2011 forward.

In Processing Year 2012 you can only e-file Tax Year 2011.

In Processing Year 2013 you will be able to e-file Tax Years 2012 and 2011.

In Processing Year 2014 you will be able to e-file Tax Years 2013, 2012, and 2011.

In Processing Year 2015 you will be able to e-file Tax Years 2014, 2013, and 2012.

Contact information

Email: ELF-TSRD@tax.ny.gov

NYS DTF e-file Help Desk: (518) 457-6387


IRS e-file Help Desk: 1 866 255-0654

NYS DTF forms and instructions: www.tax.ny.gov/forms/default.htm

Fax: NYS DTF e-file (518) 435-8660

Need help?	
 <p>Visit our Web site at www.tax.ny.gov</p> <ul style="list-style-type: none"> • get information and manage your taxes online • check for new online services and features 	 <p>Text Telephone (TTY) Hotline (for persons with hearing and speech disabilities using a TTY): If you have access to a TTY, contact us at (518) 485-5082. If you do not own a TTY, check with independent living centers or community action programs to find out where machines are available for public use.</p>
 <p>Telephone assistance</p> <p>Automated income tax refund status: (518) 457-5149</p> <p>Personal Income Tax Information Center: (518) 457-5181</p> <p>To order forms and publications: (518) 457-5431</p>	 <p>Persons with disabilities: In compliance with the Americans with Disabilities Act, we will ensure that our lobbies, offices, meeting rooms, and other facilities are accessible to persons with disabilities. If you have questions about special accommodations for persons with disabilities, call the information center.</p>

Web sites and publications

	http://www.tax.ny.gov
NYS DTF e-file Web site	http://www.tax.ny.gov/tp/efile/elf_taxpros.htm
NYS DTF forms and instructions	http://www.tax.ny.gov/forms/
NYS DTF PIT MeF e-filing Software Developer Testing Package	http://www.tax.ny.gov/bus/efile/swd_income.htm
Frequently asked questions (Taxpayer Answer Center)	http://www.tax.ny.gov/help/faq.htm
Internal Revenue Service (IRS)	http://www.irs.gov/

Important!

NYSDTF requests that Software Developers provide the department with a copy of new software as soon as it is released to the public. The department will use the software for research and to troubleshoot production issues. The department will not use the software to prepare and/or file returns. If the Software Developer supports e-file via an online application, the department requests access to that as well.

If additional information is needed regarding the department's use of software, please contact Suzanne Ayer at: TSS.PIT.Forms.Review@tax.ny.gov

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Forms Review Unit
Enterprise Service Bureau
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Software development

Schema version number

The schema version number includes the tax year, the version initial and numeric for which the schema and business rule document applies. The version initial is case sensitive. The version number of MeF business rules that are invoked for the MeF XML schemas will always have the same version number as the schema version, thereby providing a mechanism that aligns the various versions of schemas with their applicable business rules.

To verify that this is the latest schema and check for any updates, go to:

http://www.tax.ny.gov/bus/efile/swd_income.htm.

Schemas and specifications

For a complete list refer to the New York State e-file Web site for personal income tax Software Developers and download our schemas and edits file at:

http://www.tax.ny.gov/bus/efile/swd_income.htm

Software acceptance, testing, and approval

Prior to submitting test transmissions developers must complete and submit the “Letter of intent to Develop MeF Personal Income Tax E-file Software” located on our [Website](#).

The completed copy can be emailed to: ELF-TSRD@tax.ny.gov, or by clicking on the automated button contained on the form.

For PIT MeF, software vendors will be required to test and receive acceptance of their software each new tax year. Software testing for **previously approved** prior tax years is not required; acceptance is maintained for as long as the tax year is eligible for e-file.

Final transmission

When you receive no rejections, you will then be required to transmit the returns in two separate, same-day transmissions in order to test the ability of your software to increment the Transmission ID number that appears in the Transmission Header.

The Modernized e-File Assurance Testing System configuration is not identical to the MeF Production system. A tester should not expect the same response time when testing in the ATS environment versus the Production environment. Do not use ATS for performance or load testing. However, testing a single extremely large return in one transmission is acceptable.

Accepted software will be listed by NYSDTF based on number of forms supported from highest to lowest.

IRS PIT MeF Fed/State program

MeF will accept two kinds of submissions: 1) IRS (federal) submissions, and 2) NYSDTF submissions. Each return must be enclosed in a separate submission, but multiple submissions may be contained in a single message.

NYSDTF will support *linked* and *unlinked* state returns. A state submission can be *linked* to the IRS submission by including the Submission ID of the federal return in the state manifest. If the state submission is *linked* to an IRS submission (also referred to as a *Fed/state return*), the IRS will check to see if there is an accepted IRS submission under that Submission ID. If there is not an accepted federal return, the IRS will deny the state submission and a denial acknowledgement will be sent from the IRS. If there is an accepted federal return under that Submission ID, then IRS MeF will validate certain elements on the state submission and provide the submission to the participating state.

If the NYS return is *unlinked* to a previously accepted federal return (also referred to as a *State Stand-Alone Return*), then IRS MeF will validate certain elements of the submission, and, if IRS does not deny the state return, it will provide the state submission to the participating state regardless of the federal return.

Both federal and state returns must be in XML format. The federal returns must conform to the IRS valid schema versions. New York State returns must conform to the PIT MeF New York State schema.

Acceptance and Participation

Requirements for all authorized Software Developers

- Comply with the procedures, requirements, and specifications in the IRS Publication 3112, *IRS e-File Application and Participation*, and IRS Publication 4164, *Modernized e-File Guide for Software Developers and Transmitters*, on the [IRS Website](#).
- Allow *linked* and/or *unlinked* state returns.
- Re-transmit rejected and then corrected returns. • Correct any software errors identified during production. See more under [Compliance requirements](#).
- Provide the software ID within each filing.
- Not charge a separate fee for e-file.
- Adhere to the guidelines for ACH debit payment settlement dates.
- Support NYS MEA electronically.
- Support the NYS debit card refund option.
- Present the appropriate e-file signature certification language to the filer.

Software Vendor ID characteristics include the following

- A separate vendor ID must be provided for each tax software product.
- A software vendor ID will be approved at the primary form level.
- The ID is self-selected by the Developer.
- It is defined as a string allowing alpha characters and digits.
- It is limited to 10 characters.
- It is transmitted in an element called <SOFT_VNDR_ID>.
- It is a required element.
- Each unique vendor ID will test separately for approval.
- Alpha characters may relate to the name of the software company.

Confidentiality guidelines, rules, and violation consequences

Developers must conform to all IRS security requirements. For more information, see [IRS Circular No. 230](#).

Compliance requirements

Software developers must:

- Immediately correct software errors identified by the IRS/NYSDTF and distribute updates of their software packages to their clients. Failure to correct any errors or issue timely releases may result in suspension from the program.
- Immediately notify NYSDTF of any software errors identified during the filing season.
- Ensure that their tax professional software supports the printing of Form TR-579-IT, *New York State E-File Signature Authorization for Tax Year 2012 For Forms IT-201, IT-203, IT-214, and NYC-210*, and Form TR-5791-IT, *New York State Taxpayer Authorization for Electronic Funds Withdrawal for Tax Year 2012 Form IT-370*. Both consumer and tax professional software must support the printing of Form IT-201-V, *Payment Voucher for Income Tax Returns*.
- Ensure that their software supports electronic payment options and any electronic funds withdrawal information (payment effective date and routing/account numbers).

- Ensure their software supports the printing of the tax return and all supporting forms for the New York State personal income tax so that if the return cannot be e-filed, the filer can mail the printed return to NYSDTF. See Publication 75, *Specifications for Reproduction of Scannable and Non-scannable New York State Income Tax Forms*, regarding the printing of supportable forms.

New York State Software Testing for PIT MeF will begin November 2012 for Tax Year 2012

All software must be tested using the New York State test package posted on our Web site. Returns submitted under software vendor IDs that have not been approved for NYSDTF personal income tax processing will be rejected. A separate software vendor ID must be provided for each product. A software vendor ID will be approved at the primary form level. This will provide for forms with an earlier due date to be tested, approved, and released prior to other form types.

NYS reserves the right to not approve your electronic software packages until your paper packages have been reviewed and approved as well.

The income tax e-file test package and all other testing documents and schemas are available on our Web site: http://www.tax.ny.gov/bus/efile/swd_income.htm.

What you will need for testing

- Publication 98, *New York State Personal Income Tax MeF Test Package for Software Developers for Tax Year 2012*.
- NYSDTF specific current year [XML schema](#) (must use the latest version). The XML schema will include definitions and information for each field including: type, format, length, allowable values, allowable occurrences, and business/validation rules.
- Chart of current year schema business objects (BO) to be included by form
- New York State spreadsheet.

Developers must validate their files prior to submission to avoid unnecessary rejections. Developers must validate the New York State return data (XML) against the New York State Schema, and include edits and verifications based on the business rules provided for each element.

Software Developers will be given confirmation by email from the NYSDTF e-file section when software has been successfully tested and approved. Only approved software may be released and distributed by the developer. A copy of the released software must be sent to NYSDTF. Note: Acknowledgements (ACKS) for testing will not be automated; they will be manual.

Acknowledgement system

IRS MeF receipt

IRS MeF will create a *receipt* for transmitters for every state submission received. This receipt only indicates that the submission was received, and does not indicate that it has passed validation or that the state return has been provided to the participating state.

State submission denied by IRS MeF

If the state submission (linked or unlinked) does not pass IRS validation it will be *denied* by the IRS. The IRS will create an acknowledgement for the transmitter indicating that the state submission is denied and that the submission will not be provided to the state. In this case NYS will not know that the transmitter has sent a state submission to IRS e-file and will not know that the IRS denied it. These returns must be corrected and resubmitted. Your transmitter will notify you if you need to correct and resubmit a return that was denied by the IRS.

State receipt and acknowledgment

If the state submission is **not** *denied* by IRS MeF, IRS MeF will return a receipt (not an acknowledgement) and provide the state submission for the state to retrieve. IRS MeF will not create an acknowledgement for the transmitter for the state return.

NYSDTF will retrieve the state submission from IRS MeF, and immediately send a *receipt* back to IRS MeF. NYSDTF will then validate the XML data and apply the business rules to the return. An acknowledgment (indicating acceptance or rejection) will be sent back to the IRS within 72 hours; however the acknowledgement process may take up to 10 days to complete. The transmitter may pick up the acknowledgment from the IRS. An accepted acknowledgement record transmitted in XML schema format indicates the return and payment (if applicable) was received and has successfully completed the *transmission* validation process. **Note:** This does not acknowledge that the ACH (Automated Clearing House) debit requested was approved and processed. The IRS will accept filings with an "EXT_TP_ID" (new State ID-choice of Temporary ID) containing alpha characters and will allow the acknowledgements to be returned by NYSDTF with an ID containing alpha characters in the EIN field within the acknowledgement.

Resubmission of state rejected return

If a state return is rejected by NYSDTF, correct the error(s) and resubmit the return to the IRS. The corrected, resubmitted return **must** contain the *original* submission ID of the rejected return. There will be a field in the header BO in the schema labeled ORIG_SBMSN_ID.

Perfection period for rejected submissions

The e-filed perfection period is initiated only when:

- The original submission was timely.
- The original submission was rejected.
- The original submission ID# is present on the resubmission.
- The new submission is after the due date

There is a seven calendar day perfection period to correct the submission and re-file it electronically. When a previously rejected electronic return containing the original submission ID number is *accepted* by NYSDTF within the seven day perfection period, the submission **and** any e-payment included in the return data will be deemed to have been received on the date of the first rejection that occurred within that seven day period. If a submission is submitted after the seven day period, the received date for the submission and any e-payment authorized in with the return filing will be the new submission date.

Note: If the submission is rejected or denied at the IRS level, NYSDTF will not receive the original submission and the perfection period will not systematically initiate.

Processing delays

NYS DTF will make every effort to process an e-filed return once it is received and/or acknowledged. However, if the e-filed return contains an error(s), identified after the return is received/acknowledged; the return may require manual review or manual rejection.

Field information

The NYS DTF explanation fields are not as long as the federal explanation fields. NYS DTF does not utilize a table driven approach for implementing data in explanation fields. We have defined and implemented a set of data types that are specific for NYS. NYS DTF uses a string type with restrictions that differ from one element to another. The use of predefined, reusable types allows for better data validation.

There are only a few data types treated this way: *string, decimal, non-negative integer, positive integer, and integer.*

This has been deemed allowable by the TIGERS standards.

Checkbox fields

The *Checkbox* type fields, defined as switch indicator fields, have expected values of a **1** for checked and **2** for unchecked. When the field is required in the schema and the box is not checked, send the field tag with **2**. If the tag is not required and the field is not checked, do not send the field tag.

Entering addresses

The IRS allows 35 characters in their address fields. However the NYS address fields: MAIL_LN_2_ADR and MAIL_LN_1_ADR each have a **30** character limit. If 35 characters are submitted in these fields the return will **fail** Schema validation.

NYS uses field MAIL_LN_2_ADR as the primary address line.

NYS uses field MAIL_LN_1_ADR as the *Care of (C/O)* address, and for any address data overflow from field: MAIL_LN_2_ADR

Use of the % sign as care of (c/o) is now allowed.

Guidelines for entering foreign addresses

Foreign addresses must be submitted as follows:

MAIL_LN_2_ADR - with the exception of Canadian addresses, foreign ZIP codes should be entered at the end of the address field (MAIL_LN_2_ADR).

MAIL_CITY_ADR - enter city/town as applicable

MAIL_STATE_ADR - for Canadian addresses, enter province; for all other foreign addresses state must be blank

MAIL_CNTRY_CD - Enter the appropriate foreign country code as defined by the IRS. They are available at [Foreign Country Codes](#)

MAIL_ZIP_5_ADR and MAIL_ZIP_4_ADR - for Canadian addresses, enter the first 3 characters of the ZIP code in MAIL_ZIP_5_ADR, and enter characters 4-6 of the ZIP code in MAIL_ZIP_4_ADR.

For all other foreign addresses, MAIL_ZIP_5_ADR and MAIL_ZIP_4_ADR must be blank.

Guidelines for entering credit amounts on Forms IT-201-ATT and IT-203-ATT

DEP_CHLD_LAST_NAME	Dependent last name			
DEP_CHLD_FRST_NAME	Dependent first name			
DEP_CHLD_MI_NAME	Dependent middle initial			
DEP_CHLD_SFX_NAME	Dependent suffix name			
DEP_MNTH_LVD_NMBR	# of months	n/a	# of months	n/a
DEP_QUAL_EXP_AMT	n/a	n/a	n/a	Qualified expenses paid for Tax year

Key: n/a= not applicable

*These field names will need to be populated on all applicable forms in a return filing.

Fields used by NY State only:

PR_SSN_VALID_IN and SP_SSN_VALID_IND on return Header

Vendors do not send these fields as the SOAP provides the field values.

These fields are not required:

DCMT_RCVD_DT and SBMSN_ID are not required.

PSTMRK_DT must be present for DTF to compute the perfection period.

Refer to the [state spreadsheet](#) for more information.

Payment handling and acceptance

Paying a balance due

NYS DTF allows 3 options to pay balances due from e-filed personal income tax documents:

- by ACH debit included with the filing data when the document is e-filed
- by check or money order with the payment voucher (Form IT-201-V)
- by credit card

New for TY2012: partial payments will now be accepted on the NYS return.

International ACH transactions or IAT: Software must not allow an ACH electronic fund withdrawal to be requested where the funds would be coming from an account outside the U.S.
To pay by electronic funds withdrawal (direct debit)

Payments may be made by an electronic funds withdrawal from a checking or savings account as long as the payment is not coming from an account outside the United States. At the time of filing, the following information must be provided with the return data:

- the amount to be withdrawn
- the bank account number
- the bank routing number
- the type of the account:
 - personal checking
 - personal savings
 - business checking, or
 - business savings

- the date of the withdrawal.

Taxpayers can pay the full balance due, or make a partial payment.

Taxpayers can specify a payment date up to and including the April due date of the return. If the payment date falls on a weekend or bank holiday, the payment will be withdrawn the next business day. If the taxpayer e-files before the April due date, the money will not be withdrawn from their account before the date they specify, but the date specified cannot be after the return due date. For returns e-filed after the April due date the authorized withdrawal from their account will be processed on the date their e-filed return is accepted.

The taxpayer can revoke an electronic payment by calling the NYSDTF no later than five (5) business days before the date of the payment withdrawal.

To verify that an electronic payment was successful, check the bank statement against which the payment was authorized.

Pay by check or money order

Payments may be made by check or money order. Payment must be accompanied by Form IT-201-V, *Payment Voucher for Income Tax Returns*. Taxpayers should follow the instructions for Form IT-201-V. When possible, Form IT-201-V and payment should not be submitted until after receipt of the Tax Department's acceptance acknowledgment. However, these payments must be submitted on or before the due date to avoid penalty and interest charges. Do **not** include a copy of the return with Form IT-201-V.

Mail Form IT-201-V and payment to:

NYS PERSONAL INCOME TAX
PROCESSING CENTER
PO BOX 4124
BINGHAMTON NY 13902-4124

Pay by credit card

Taxpayers can use Discover®/Novus®, MasterCard®, Visa® or American Express Cards® to pay their balance due. The credit card service provider will charge a convenience fee to cover the cost of this service. The fee will be disclosed before the transaction is completed.

For returns filed before the April due date, credit card payments can be made any time up to and including that due date. For returns filed on or after the April due date, the credit card payment must be made at or about the time the return is filed to avoid receiving a bill.

Return payments can be made using any one of the three credit card service providers listed below:

- (1) Official Payments Corp.SM
- (2) Link2Gov Corporation
- (3) Value Payments Systems

You can connect to any of these Web sites at the following link:

http://www.tax.ny.gov/pay/all/pay_by_credit_card.htm:

The taxpayer should have a copy of their completed NYS income tax return available. Taxpayers will receive a confirmation number for successful credit card payments and should retain the confirmation number as proof of payment.

All of the following information MUST be present for e-filed documents containing ACH debit payments:

- ACH_IND
- RFND_OWE_IND**
- BANK_ACCT_NMBR (Bank account number)
- ABA_NMBR (Bank routing number)
- ACCT_TYPE_CD (Account type: 1 = checking, 2 = savings)
- ELC_AUTH_EFCTV_DT (Requested settlement date)
- PYMT_AMT (Total payment amount)
- BAL_DUE_AMT
- BNK_ACCT_ACH_IND (1= business, 2 = personal)

If the payment amount of an ACH debit is greater than zero, **all** of these required fields **must** be present in the submission, otherwise it will be rejected.

If the payment amount of an ACH debit is equal to zero, **none** of these required fields should be present in the submission. If any or all of these required fields is present in the submission, it will be rejected.

The authorization date for the payment is the earliest date that the electronic funds withdrawal will be debited from the specified account. You can specify a payment date up to and including the due date of the return, **without** regard to extensions. If the payment date falls on a weekend or bank holiday, the payment will be withdrawn the next business day. If you e-file your return before the due date, the money will be withdrawn from your account on the date you specify. A return received prior to the due date that has no requested withdrawal date will be rejected because it does not conform to NACHA rules. For a return e-filed after the due date, the withdrawal will be processed on the date the e-file return is accepted. This payment option is available through the end of the e-file season. Please note that unpaid returns will be accepted in e-file and the balance due will be billed at a later date, once the return is fully processed.

When submitting a corrected return where an original return has already been processed and had a payment that was already processed, be sure to remove any ACH data that was previously submitted or adjust it if an additional payment should be debited. If the ACH data is exactly the same on the subsequent filing, the filing will reject.

ACH debit settlement date guidelines must be strictly enforced

Software Developers are required to have the following guidelines set in their software for customers entering a payment settlement date, (ELC_AUTH_EFCTV_DT) for ACH debit payments:

- Not allow a payment settlement date earlier than the submission date, or
- Not allow a payment settlement date later than the due date, if the filing is on or before the due date, or

- Not allow a payment settlement date later than the submission date, if the filing is after the due date.

Software vendors who are found to be in violation of the above-noted guidelines for ACH debit payment settlement dates will have their approvals to e-file NYS personal income tax returns, extensions, and payments revoked, until proof of compliance is verified.

Refunds

Direct deposit refunds

We need the bank account number and the routing transit number, entered twice, to the financial institution to which the refund is being made. The routing number is the nine-digit number at the bottom of a check. An e-filed return with an invalid routing number will be rejected. Additional required information: the refund amount; the checking or savings account information; and the identification of the account as either a personal or business account.

The ACH_IND and RFND_OWE_IND fields must be set correctly.

If the direct deposit indicator is present, then the following information must be included

- IAT_IND (IAT Indicator)
and
- ABA_NMBR (Bank routing number)
and
- BANK_ACCT_NMBR (Bank account number)
and
- ACCT_TYPE_CD (Account type: 1 = checking, 2 = savings)
and
- BNK_ACCT_ACH_IND (1= business, 2 = personal)

All of the following information MUST be present for e-filed documents containing refunds:

- RFND_OWE_IND (refund owed)
and
- DBT_CARD_RFND_IND (debit card refund indicator), or PAPER_CHK_RFND_IND (paper check refund indicator).

Debit card option

The option for the NYS debit card must be available on Forms IT-201, IT-203, IT-214 and NYC-210:

- DBT_CARD_RFND_IND

More information is available at: http://www.tax.ny.gov/pit/file/debit_cards.htm

Signature requirements for personal income tax e-file returns and extensions updated for TY2012

Software developers must provide instructions to guide EROs and taxpayers in the use of signature check boxes for fulfilling the signature requirements. Software developers must present the exact certification language described in this section.

Signature requirements for returns e-filed through your tax preparation professional software package

The taxpayer(s) and the ERO / Preparer must sign **Form TR-579-IT, New York State E-File Authorization Signature for Tax Year 2012 For Forms IT-201, IT-203, IT-214, and NYC-210**. Form TR-579-IT establishes that the taxpayer has reviewed his or her return, and authorizes the e-filing of the return, and if an electronic funds withdrawal (for payment of the amount owed on the return) has been requested, it verifies that the taxpayer has authorized the electronic funds withdrawal. The ERO/Preparer must retain the signed Form TR-579-IT for 3 years (**do not mail it to the NYS Tax Department**). The ERO/Preparer must also sign the return electronically by checking a box that indicates that they have read and agreed to our declaration certification language. See the return declaration.

Signature requirements for extensions (Form IT-370) e-filed through your tax preparation professional software package

For a No-Balance-Due Extension (Form IT-370) there is no signature requirement for the taxpayer or the ERO/Preparer. You are not required to complete or retain a Form TR-579.1-IT, *New York State Taxpayer Authorization for Electronic Funds Withdrawal for Tax Year 2012 for Form IT-370*, for these transactions.

For a Balance-Due Extension (Form IT-370) e-filed through your software (not through the NYS Tax Department's Web site), the taxpayer must pay the balance due with an electronic funds withdrawal. The primary taxpayer must sign **Form TR-579.1-IT, New York State Taxpayer Authorization for Electronic Funds Withdrawal for Tax Year 2012 for Form IT-370**, to establish that he/she has authorized the ERO to include the information necessary for the Tax Department to initiate the withdrawal. The ERO is not required to sign Forms TR-579-IT or TR-579.1-IT for these extensions; however, the ERO must retain the Form TR-579.1-IT for 3 years (**do not mail it to the NYS Tax Department**). The ERO/Preparer must also sign the extension electronically by checking a box that indicates that they have read and agreed to our declaration certification language. See the extension declaration.

Returns e-filed by taxpayers themselves (self-filers) using commercial software

Taxpayers are required to sign the return electronically by checking a box that indicates that they have read and agreed to our declaration certification language. See the return declaration. Form TR-579-IT and ERO/Preparer declaration check box are not required.

Balance-due extensions (Form IT-370) e-filed by taxpayers themselves (self-filers) using commercial software

Taxpayers are required to sign the extension electronically by checking a box that indicates that they have read and agreed to our declaration authorization language. See the extension declaration. Form TR-579.1-IT and ERO/Preparer declaration check box are not required.

No-balance-due extensions (Form IT-370) e-filed by taxpayers themselves (self-filers) using commercial software

There is no signature requirement for the taxpayer or the ERO/Preparer.

Extensions (Form IT-370) e-filed on the Tax Department Web site

The Tax Department offers an application on our Web site that supports electronic filing by tax preparers or self-filers of balance-due and no-balance-due extensions. For balance-due

extensions, multiple payment methods are available: electronic funds ACH withdrawal, credit card, and check or money order.

Declaration certification language for e-filed returns and extensions

NYS e-file software intended for **tax professionals** must present the following applicable declaration on the screen(s) for the tax preparer to complete. Software developers must present the exact certification language described for each filing type.

Declaration of tax preparer to be included on approved NYS e-file products for tax professionals

ERO/ Preparer Certification and Signature (for the return)

By checking the box below, I certify that I have a valid New York State E-File Signature Authorization for Tax Year 2012 (Form TR-579-IT), authorizing me to sign and file this return on behalf of the taxpayer(s). I further certify that all information provided on the return is true, correct and complete; to the best of my knowledge and belief, and that I have provided a copy of this return to the taxpayer(s). If financial institution account information has been provided on the return, I certify that the taxpayer(s) has agreed to payment of the amount indicated as due by electronic funds withdrawal, that the taxpayer(s) has authorized the New York State Tax Department and its designated financial agents to initiate an electronic funds withdrawal from the indicated account, and that the designated financial institution is authorized to debit the entry to the taxpayer's account. By checking the box shown below, I understand and agree that I am electronically signing and filing this return.

I have read the certification above and agree

Declaration of tax preparer to be included on approved NYS e-file products for tax professionals – Extensions with an authorization for an electronic payment

ERO/ Preparer Certification and Signature (for the authorization of electronic payment for an extension)

By checking the box below, I certify that I have a valid New York State Taxpayer Authorization Electronic Funds Withdrawal for Tax Year 2012 Form IT-370 (Form TR-579.1-IT), authorizing me to submit this extension on behalf of the taxpayer(s). I certify that the taxpayer(s) has agreed to payment of the amount indicated as due by electronic funds withdrawal, that the taxpayer(s) has authorized the New York State Tax Department and its designated financial agents to initiate an electronic funds withdrawal from the indicated account, and that the designated financial institution is authorized to debit the entry to the taxpayer's account.

I have read the certification above and agree

NYS e-file software intended for **individual online filers** must present the following applicable declaration on the screen(s) for the taxpayer(s) to complete: **Declaration of taxpayer(s) to e-file the return:**

By checking the box shown below, I declare, under penalty of perjury, that I have examined the information on my 2012 New York State electronic personal income tax return, including any accompanying schedules, attachments, and statements, and certify that my electronic return is true, correct, and complete.

If I am paying my New York State personal income taxes owed by electronic funds withdrawal, I authorize the New York State Tax Department and its designated financial agents to initiate an electronic funds withdrawal from the financial institution account indicated on my 2012 electronic return, and I authorize my financial institution to debit the entry to my account. I understand and agree that I may revoke this authorization for payment only by contacting the Tax Department no later than five (5) business days prior to the payment date.

Taxpayer

I have read the certification above and agree

Spouse

I have read the certification above and agree

Declaration of taxpayer to authorize electronic payment for an extension

If an amount owed on this extension is being paid by electronic funds withdrawal, I authorize the New York State Tax Department and its designated financial agents to initiate an electronic funds withdrawal from the indicated account, and I authorize the financial institution to debit the entry to the account. I understand and agree that I may revoke this authorization for payment only by contacting the Tax Department no later than five (5) business days prior to the payment date.

I have read the authorization above and agree

Handling of attachments

Attaching non-XML documents

All Binary Attachments must be in PDF format. This includes: pages with additional information from forms, letters of explanation, etc. A separate *Binary Attachment XML document* must be created for each PDF and included in the submission data. The PDF must be included in the attachment folder of the submission ZIP file.

Each individual PDF cannot exceed 64 megabytes uncompressed. For the accuracy of a document image, whether an attachment is in a PDF file or an image file format, the resolution should be no more than 200 dpi.

Do not password protect, or encrypt, or in any way *document protect* PDF attachments submitted through MeF.

DO NOT SEND any tax returns as PDFs

Please refer to IRS Publication 4164 for Binary Attachment Submissions and Guidelines. Attaching non-XML documents (PDF files) is different than attaching XML documents. To attach a PDF file, the following steps must be performed:

- Create the PDF file.
- Create a Binary Attachment XML document in the submission data that describes the PDF file.

- Create references, if any, from the element(s) to which the PDF file is attached to the Binary Attachment.

Attaching XML document

- If the PDF file is to be attached to an element for a line, form, or schedule, create a reference from the element to the Binary Attachment XML document. It is important to note that the reference is created from the element to the Binary Attachment XML document, not to the PDF file. If no reference is created to the Binary Attachment XML document, then the PDF file is considered to be *attached* to the submission. It is important to note that creating reference(s) to PDF files is needed only when the IRS specifies the conditions under which the reference must be created, and the reference locations within return data where the reference must exist.
- Include the number of binary attachments in the submission in the *BinaryAttachmentCount* attribute, which is used to indicate the number of binary attachments in the return, of element *ReturnHeader*.
- Include the PDF file in the submission ZIP file that constitutes the submission.

Create one Binary Attachment XML document for each PDF file included in the submission. There is a one-to-one relationship between the PDF file and the Binary Attachment XML document that describes it.

The name of the PDF file, including the extension, is included in the *AttachmentLocation* element. A brief description must be included in the *Description* element of the Binary Attachment XML document. The schema for the Binary Attachment document is defined in the file named *BinaryAttachment.xsd*.

Acknowledgement acceptance and reject codes

http://www.tax.ny.gov/bus/efile/swd_income.htm

W-2, 1099-R and locality information:

Specific codes for locality name for New York City and Yonkers tax withheld (Forms W-2, box 20, and 1099-R, box 14)

Code	Description
NYC	Name of locality is New York City (see acceptable variations below)
YONKERS	Name of locality is Yonkers (see acceptable variations below)

Locality name

For New York City, including the Bronx, Brooklyn, Manhattan, Queens, and Staten Island, and the city of Yonkers, the following locality names will be accepted. Case (upper versus lower) does not matter.

For New York City:

"NEW YORK CITY"
"NY"

"NYC"
"N Y"
"NWY"
"NW Y"
"NEWY"
"BRONX"
"BRKLYN"
"CITYNY"
"STATEN"
"QUEENS"
"CITY NY"
"CITYN Y"
"BROOKLYN"
"CITYOFNY"
"CITYOF NY"
"CITY OFNY"
"CITYOFN Y"
"CTY OF NY"
"MANHATTAN"

For Yonkers:

"YK"
"YON"
"YNK"
"CITYOFYK"
"CTYOFYKR"
"CITYOF YK"
"CITY OFYK"
"CTY OF YK"

W-2 Verification Indicator

If a return is rejected for Error Code R0502 or R0503, commonly caused by user input error, users should check their W-2(s) and correct the input error. If the user does not find any input errors, they should call the NYS DTF e-file Help Desk and they will be instructed to enter a particular value for this indicator and re-transmit the return. This will resolve the reject. Software Developers are encouraged to support this, and should add the W-2 Verification Indicator to an input screen for user entry.

Entries from Form W-2, Box 14, on NYS returns

Public employee retirement contributions, usually shown on a paper W-2 in box 14 as "414(h)", "Pub Ret", "NYS Ret Cont", etc. (e.g., "414 (h) 750.00") may be subject to NYS tax even though they are not subject to federal tax. All NYS public employee retirement contributions, except Long Island Railroad and Staten Island Railroad, are subject to NYS tax. Public employee retirement contributions from other states are not subject to NYS tax. Refer to the form instructions for details.

Similarly, NYC flexible benefits program (IRC 125), usually shown on a paper W-2 in box 14 as "IRC 125", "IR 125", "125M", etc. (e.g., "IRC 125 300.00") are subject to NYS tax even though they are not subject to federal tax.

These two amounts, if subject to NYS tax, should be added to the appropriate lines on Form IT-201 or Form IT-203. Refer to the form instructions for details.

For descriptions of all error codes, see [Acknowledgment acceptance and error codes](#) Crosswalk.

Appendix

NYS county codes

Field information for field name COUNTY_CD:

County names and codes table:

ALBA ny	FRANK lin	ONE ida	SCHU ylar
ALLE gany	FULT on	ONON daga	SENE ca
BRON x	GENE see	ONTA rio	ST Lawrence
BROO me	GREE ne	ORAN ge	STEU ben
CATT araugus	HAMIL ton	ORLE ans	SUFF olk
CAYU ga	HERK imer	OSWE go	SULL ivan
CHAU tauqua	JEFF erson	OTSE go	TIOG a
CHEM ung	KING s	PUTN am	TOMP kins
CHEN ango	LEWI s	QUEE ns	ULST er
CLIN ton	LIVIN gton	RENS selaer	WARRE n
COLU mbia	MADIS on	RICH mond	WASH ington
CORT land	MONR oe	ROCK land	WAYNE
DELA ware	MONT gomery	SARA toga	WEST chester
DUTC hess	NASS au	SCHE nectady	WYOM ing
ERIE	New York = NY	SCHO harie	YATE s
ESSEX	NIAGA ra		

Foreign country codes

Visit IRS Web site: [http://www.irs.gov/Tax-Professionals/e-File-Providers-&Partners/Foreign-Country-Code-Listing-for-Modernized-e-File-\(MeF\)-Tax-Years-2009,-2010,-and-2011](http://www.irs.gov/Tax-Professionals/e-File-Providers-&Partners/Foreign-Country-Code-Listing-for-Modernized-e-File-(MeF)-Tax-Years-2009,-2010,-and-2011). NYSDTF will use the foreign country codes as defined by IRS.

Links to publications

[Guidance, regulations & laws](#)

Testing attachment

Vendors interested in testing with NYSDTF for personal income tax MeF will need to submit a Letter of Intent. Additionally NYSDTF may require certain test scenarios based on the information provided. To request a Letter of Intent send an email to ELF-TSRD@tax.ny.gov or [visit our Website](#).

Sending test files - when sending a test file to NYSDTF, vendors will need to send an email to ELF-TSRD@tax.ny.gov listing out the submission IDs that need to be tested.

Testing for tax year 2012 will start November 2012.

Developers should use the scenarios and general guidelines from our Publication 98, *New York State Personal Income Tax MeF Test Package for Software Developers for Tax Year 2012*, http://www.tax.ny.gov/pit/efile/inc_forms.htm. For MeF specific information, refer to NYSDTF spreadsheet http://www.tax.ny.gov/bus/efile/swd_income.htm.

Prior to transmitting test files, developers should validate the New York State return data (XML) against the latest version New York State schema.

Acknowledgments - NYSDTF will not automatically generate an acknowledgment for test files; when we receive submissions they will be acknowledged via an email to the developer.

If you have any questions or comments, please contact us via email at ELF-TSRD@tax.ny.gov or call Colleen Jess at (518) 453-4996 or Jason Bardin at (518) 453-5342.

Revisions

Date	Description	Page Number
01/07/2013	Fax (518) 485-2348 changed to (518) 435-8660	11
01/07/2013	Contact information	29
01/15/2013	Changed startup date from January 22,2013 to January 30, 2013 through IRS shutdown	10