



**New York State
Partnership
Modernized e-File (MeF)
Software Vendor
Acceptance Test Booklet

For Tax Year 2015**

The information presented is current as of this publication's print date.
Visit our Web site at www.tax.ny.gov for up to date information

This publication describes the New York State (NYS) Assurance Testing System procedures for software developers participating in the NYS Partnership Modernized e-file (MeF) Program. Within this publication, you are referred to as the software developers, and we are the New York State Department of Taxation and Finance (NYS).

Who must test

All software developers participating in the NYS Partnership MeF Program must test. Participating software developers and transmitters must also test with the IRS; see IRS Publication 5078 for details.

What to test

The tests verify that the e-file software creates a complete return, carries appropriate values from one line/form to another, and formats and transmits NYS returns according to the MeF specifications.

You must test all the NYS e-file forms that you support. You must inform us which e-file forms you support by completing the *Letter of Intent to Develop MeF Partnership Tax E-file Software for Tax Year 2015*. No tests will be accepted without a valid Letter of Intent on file. The Letter of Intent is available on our Web site.

All tax forms must be transmitted in xml, not pdf. Amount fields should include dollar amounts only; do not include cents (unless stated otherwise). The return will reject if cents are included.

Test EINs

We will assign (by email) the test EINs for each software developer.

Test cases to submit

You must submit the applicable test scenarios to cover all the e-file forms you support. Each test will be posted separately on our Web page. The test scenarios do not include lines which your software is expected to compute.

If you do not support one or more of the forms associated with a test scenario, submit the test without the unsupported form(s). After you have completed the required tests, you may submit additional test returns not covered in our test package. You must include the submission ID in your email for each test case you have submitted, and any changes you made to the test scenario (e.g., not supporting some forms, and the line changes as a result).

Vendors supporting Form IT-204, *Partnership Return*

Do not submit all IT-204 tests at once. You must successfully complete Test 1503 before submitting other IT-204 tests. Do not send other IT-204 tests prior to approval of Test 1503; we will not review them. This is a change from previous years and is designed to improve the testing process. Instead of reviewing similar errors on all of your IT-204 submissions, the intent is to get the IT-204 form correct first. This is expected to reduce the turnaround time required to review most submissions.

Form IT-204-LL, *Partnership, Limited Liability Company, and Limited Liability Partnership Filing Fee Payment Form*

Priority will be given to the review of Tests 1501 and 1502, which include Form IT-204-LL. While we suggest you may submit these separately, they may be sent with other tests. We will review Tests 1501 and 1502 first

and send those results. We will prioritize all IT-204-LL tests as the due date for filing IT-204-LL is earlier than other partnership forms.

When to test

Testing with NYS is scheduled to begin when the IRS ATS system opens in November. To ensure adequate time for testing before the filing season, you should submit the initial NYS test submissions as soon as possible. We do not require you to pass the IRS testing before testing with NYS. You may conduct the IRS and NYS testing concurrently if the IRS allows it.

Transmitting test submissions

You must transmit NYS test submissions through the IRS MeF system. If your test submission is rejected by the IRS, we will not know and will not be able to retrieve it. When your test submission has been successfully transmitted to the IRS, you must provide, by email, the Submission ID of the test case, and any deviation from the test case.

Test acknowledgment

Our ATS system does not automatically send acknowledgments (ACKs). If requested, we will send one ACK to software developers/transmitters to test the acknowledgment system.

Communicating test results

We will inform you by email when we receive your test submission, and will email you the test results. We will make every effort to provide test results to you within 48 hours, Monday through Friday.

New York State e-file signature requirement

We require tax preparation software to display Signature Declaration text and the Certification checkbox to users for each tax document prepared. The box cannot have a default check within the box when it is displayed to the user. For additional information, see Publication 97, *New York State Partnership Modernized e-File (MeF) Guide for Software Developers For Tax Year 2015*.

Approval of e-file software

To be accepted into the NYS e-file program, you are required to successfully complete the NYS testing, in addition to completing the IRS testing. Once you successfully complete the NYS test, we will inform you by email that your e-file software has been approved for NYS e-file. We can also approve software by primary form: i.e., IT-204, IT-204-LL, and IT-370-PF. This will allow you to release your software product in phases. For example, if requested, we can approve your software for IT-204-LL when you pass the tests for IT-204-LL, and then approve your software for IT-204 when you pass that test at a later date. A list of approved e-file software packages will be posted on our Web site, with a link to the software developers' Web site (if provided by the software developers).

Our contact email

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