



Letter of Intent to Develop MeF Fiduciary Income Tax E-file Software For Tax Year 2016

If you are a software developer who plans to market or distribute software for preparation and e-filing of New York State Fiduciary Income Tax forms, you must complete this form before you can begin testing. If you have more than one product you must complete and submit a separate Letter of Intent for each product; each product must have its own Software ID

Your response is for testing purposes. It does not constitute a binding legal contract.

We need this information to ensure that we:

- Have the most current vendor information on file; and
•Are able to determine the status of each vendor's progress throughout the ATS Testing process.

Instructions:

- 1. Please complete all the relevant vendor information fields below. You may choose your own New York State Software ID. This may be up to ten Alpha/Numeric characters.
2. In the Supported Forms section, check the boxes that correspond to the forms your software will provide. Indicate any relevant information that pertains to the forms in the corresponding "Comments" section. See page 4 for new information regarding PDF attachments.
3. When completed, save a copy of this file and return via email to NYSFIDMEF@tax.ny.gov

Notify us of any changes. If, after you submit this letter, you decide to change the forms you have included in your software package, you must notify us within seven days. Additional testing may be required.

Check applicable box(es):

- Software Developer- developing commercial software for resale Professional Product
Fiduciary Filer- developing software for in-house use Online Product

NYS Software ID [input field]

Product Name [input field]

EFIN [input field]

ETIN [input field]

NACTP Member? Yes No If yes, enter member ID# [input field]

Contact Information

Legal Name

Firm Name

Address

City State Zip
Code

Website

Primary Contact Name

E-mail Address

Phone Number Ext

Fax Number

Secondary Contact Name

E-mail Address

Phone Number Ext

Fax Number

Paper Forms Software ID

Last 4 digits of number printed above barcode by software is Paper Forms Software ID



Please indicate if you support the following:

	Yes	No		Yes	No
Linked			Amended Return		
Unlinked					

Forms Supported

Please indicate your support for the following forms. "XML" indicates support for the form in XML. "PDF" indicates the form is supported through PDF attachment. You must specify XML or PDF for all credit / additional forms.

***NOTE:** If your software supports any or all of forms IT-370-PF, IT-205, or IT-2106, they must be supported in XML. PDF attachment of main forms is not allowed.

Form	XML	PDF	Form	XML	PDF	Form	XML	PDF
Main Forms								
IT-205		XML only*	IT-370-PF		XML only*	IT-2106		XML only*
Credit / Additional Forms								
IT-205-A			IT-205-C			IT-205-J		
IT-112-R			IT-135			IT-182		
IT-212			IT-217			IT-219		
IT-222			IT-223			IT-225		
IT-241			IT-249			IT-256		
IT-398			IT-399			IT-601		
IT-603			IT-604			IT-606		
IT-607			IT-611			IT-611.1		
IT-611.2			IT-612			IT-637		
IT-638			IT-639			IT-640		
IT-641			IT-642			IT-643		
IT-644			IT-645			IT-646		
W-2			W-2G			1099-R		
1099-INT								

Comments:

New for Tax Year 2016 – New York State Fiduciary MeF to Accept Credit Forms in PDF Format

Beginning with tax year 2016, the New York State Department of Taxation and Finance(NYSDTF) will accept fiduciary e-file submissions with PDF attachment of credit forms and other forms previously accepted in XML only. This change will significantly increase the number of returns eligible to be electronically filed. Following are some details about this change to the NYSDTF Fiduciary MeF Program.

- 1) Attachment of PDF credit or additional forms will be allowed *beginning with tax year 2016 filings*. Previous and prior year electronic filings do not allow credit forms to be submitted as PDF attachments.
- 2)Only credit and additional forms listed on the *Letter of Intent to Develop MeF Fiduciary Income Tax E-file Software For Tax Year 2016* will be accepted as PDF attachments.
- 3) Software vendors supporting Form IT-205 *Fiduciary Income Tax Return* will be required to support ALL credit forms and additional forms accepted for Fiduciary e-File in either XML *or* PDF. By indicating your software supports form IT-205 in the “Supported Forms” section above, you agree to this stipulation.
- 4) Any forms your software supported in XML in previous years must continue to be supported in XML for tax year 2016. Vendors may add additional forms supported in XML. NYSDTF encourages vendors to support as many forms as possible in XML.
- 5) Attachments may be created from fill-in PDF forms available on the NYSDTF website or from forms scanned into PDF format. Approved e-file tax preparation software must provide the necessary instructions for creating, scanning, or exporting documents in PDF format and submitting these documents as attachments that are required by NYSDTF. All attachments must adhere to the guidelines for PDF attachments listed in Publication 90 *New York State Fiduciary Income Tax Modernized e-file(MeF) Guide for Software Developers For Tax Year 2016*.

If you have questions about this program please contact us at NYSFIDMEF@tax.ny.gov.