



Letter of Intent (LOI) to Develop MeF Fiduciary Income Tax E-file Software for Tax Year 2019

If you are a software developer (SWD) who plans to market or distribute software for preparation and e-filing of New York State (NYS) fiduciary income tax forms, you **must** complete this form before you can begin testing. If you have more than one product you need to complete and submit a separate letter of intent for each product; each product must have its own software identification.

We need this information to ensure that:

- we have the most current vendor information on file;
- we are able to determine the status of each vendor's progress throughout the ATS testing process; and
- all issues in production are identified, communicated, and corrected.

Instructions:

- Complete all the relevant vendor information fields below. You may choose your own New York State Software ID. This may be up to 10 alpha/numeric characters.
- In the *Supported Forms - XML/PDF* section, check the boxes that correspond to the forms that your software will provide. Indicate any relevant information that pertains to the forms in the corresponding *Comments* section.
- When completed, save a copy of this file and return via email to NYSFIDMEF@tax.ny.gov.

Notify us of any changes

After you submit this letter, if you change the forms you have included in your software package, you must notify us within seven days. An updated letter of intent and additional testing may be required.

Software errors

The following steps must be taken to ensure the mitigation of production errors:

- Immediately notify the New York State Department of Taxation and Finance (NYS DTF) of any software errors as they are identified during the filing season.
- Discuss with NYSDTF options to correct errors
- Make every reasonable effort to test with NYSDTF before moving change(s) to production
- Correct software errors identified by the Internal Revenue Service (IRS), NYSDTF, or you, as the SWD, and distribute updates of your software packages to your users.
- The SWD **must** supply NYSDTF with the specific resolution and date at the time the software fix is released.
- Failure to comply may result in suspension from the program.

Type of software product	Do-it-yourself(DIY) /Consumer (desktop)	DIY/Consumer (web-based)
	Professional/Paid preparer (desktop)	Professional/Paid preparer (web-based)

NYS software ID

Product name

EFIN

ETIN

NACTP member:	Yes	No	Member ID#	Paper vendor ID # (if different from NACTP #)
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Contact information

Legal name

Firm name

Address

City	State	ZIP code
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Website or URL

Primary contact name

E-mail address

Phone number	Ext
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Secondary contact name

E-mail address

Phone number	Ext
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Responses to the following items are required. Please confirm your support for:

Linked returns	Unlinked returns	Yes	No
Amended returns			
Foreign address			
PDF attachments - NYS Credit Forms			
PDF attachments - Certificates and Correspondence			

As part of the NYS vendor agreement, SWDs are required to submit a National Letter of Intent (NLOI).
 Have you submitted an NLOI? Yes No Date submitted

Rebranded software products

Complete this section if your product is rebranded. If there are more than five software products that have been rebranded under a different name, please list them on a separate sheet and attach it to this submission.

Note: In order for the software to be considered rebranded, changes cannot be made to the software requirements and output(s). It is your responsibility to make sure the rebranded product reflects the current software requirements and output(s).

Rebranded product name		National Software ID*
Contact person	Email address	Phone
Rebranded product name		National Software ID*
Contact person	Email address	Phone
Rebranded product name		National Software ID*
Contact person	Email address	Phone
Rebranded product name		National Software ID*
Contact person	Email address	Phone
Rebranded product name		National Software ID*
Contact person	Email address	Phone

*If not available at the time of LOI submission, please provide it when available.

For rebranded products, NYSDTF has the following requirements for e-file ATS approval

- Rebranded Products are not required to complete e-file ATS/paper form approval

Supported Forms - XML / PDF

Indicate your support for the following forms. *XML* indicates support for the form in extensible markup language (XML). *PDF* indicates support for the form as a portable document format (PDF) attachment.

Note: There are no new forms for tax year 2019.

Form	XML	PDF	Form	XML	PDF	Form	XML	PDF
<u>Main Forms</u>			IT-249	XML only		IT-642		
IT-370-PF		XML only	IT-256	XML only		IT-643		
IT-205		XML only	IT-2105.9			IT-644		
IT-2106		XML only	IT-398	XML only		IT-645		
IT-205-T			IT-399	XML only		IT-646		
IT-205-A			IT-601			IT-647		XML only
IT-205-C			IT-603	XML only		IT-648		
IT-205-J			IT-604	XML only		IT-649		XML only
IT-112-R			IT-606	XML only		IT-650		
IT-135			IT-607			DTF-622		
IT-182			IT-611			DTF-686		
IT-212		XML only	IT-611.1			<u>Wage Statements</u>		
IT-217			IT-611.2			W-2		XML only
IT-219			IT-612			W-2G		XML only
IT-222			IT-631			1099-DIV		XML only
IT-223			IT-635			1099-G		XML only
IT-225		XML only	IT-637			1099-INT		XML only
IT-230			IT-638			1099-MISC		XML only
IT-241		XML only	IT-640			1099-R		XML only
IT-242			IT-641	XML only				

Comments:

