



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

If you are a software developer who plans to market or distribute software for preparation and e-filing of New York State (NYS) partnership 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 NYS 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 NYSPARTMEF@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 LOI 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. Software supporting IT-204 **must** support IT-204.1, IT-204-CP, and IT-204-IP in XML.

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

Form	XML	PDF	Form	XML	PDF	Form	XML	PDF
<u>Main Forms</u>			IT-399		XML only	IT-644		
IT-370-PF		XML only	IT-603		XML only	IT-645		
IT-204		XML only	IT-604		XML only	IT-646		
IT-204-LL		XML only	IT-606		XML only	IT-647		XML only
<u>Attachments</u>			IT-607			IT-648		
IT-204-CP		XML only	IT-611			IT-649		XML only
IT-204-IP		XML only	IT-611.1			IT-650		
IT-204.1		XML only	IT-611.2			Y-204		
IT-212		XML only	IT-612			DTF-621		
IT-223			IT-631			DTF-622		
IT-225		XML only	IT-634			DTF-624		
IT-236			IT-635			DTF-686		
IT-238			IT-636					
IT-241		XML only	IT-637					
IT-242			IT-638					
IT-248			IT-640					
IT-249		XML only	IT-641		XML only			
IT-250			IT-642					
IT-256		XML only	IT-643					
IT-398		XML only						

Comments:

Signature

I acknowledge that all e-file ATS tests submitted during the approval process are created in and originate from the actual software.

I acknowledge that all electronic returns received by NYS generated from this software will be electronically filed from the initially approved product version, or a subsequent product update.

I acknowledge that NYS will be notified immediately of any incorrect and/or missing calculation or e-file data element for any electronically filed returns submitted to NYS.

I acknowledge that software errors identified by the IRS/NYS DTF, or the SWD, will be immediately corrected and updates distributed to users. The SWD **must** supply NYS DTF with the specific resolution and date when the software fix is released. I understand that failure to correct any errors or issue timely releases may result in suspension from the program.

I acknowledge users/customers of desktop products who attempt to e-file 10 or more business days after a production release will be required to download and apply the product update.

I acknowledge that as part of our start-up process that we have examined our internal help information (includes pop-ups, FAQs, information bubbles etc.) to ensure that it conforms with all tax instruction and law changes

As the representative of the above named organization, I agree, on behalf of the organization, to comply with all requirements listed above. Furthermore, by signing this agreement, my organization is agreeing to all of the requirements listed above. The New York State Department of Taxation and Finance reserves the right to revoke approval acceptance of any company and thereby refuse to accept any additional returns from such software company that does not adhere to above stated requirements.

As an approved New York State provider I agree to provide true, accurate, current, and complete information about my company. I understand that if I provide any information that is untrue, inaccurate, obsolete, or incomplete, the New York State Department of Taxation and Finance has the right to deny, suspend, or terminate my account.

(Authorized representative) printed name

(Authorized representative) signature