



New York State Department of Taxation and Finance

Personal Income Tax MeF Acceptance Testing System for Tax Year 2015

TEST ID: 1007

Forms Included: NYC-208 Standalone

Return specific information:

- Prime taxpayer: Gerald G Gardner born on 09-24-1975 – Filing single
- Taxpayer is a full year NYC resident and does not need to file a tax return because his income is less than \$4000 so he is filing NYC-208 as a standalone.
- Alice B. Girlfriend shared the same apartment as her main residence throughout the year.
- No other household members.
- Gerald and Alice decide that Gerald will claim the entire amount of the credit.
- Amounts below are for the household:
 - Line 7: Federal Adjusted gross income = \$90,250 (Alice's)
 - Line 8: NYS additions to FEDAGI = \$8,500 (Alice's)
 - Other income = \$3,750 (Eric's)
- Total rent paid during 2014 = \$36,000 (does not include any utilities) paid over 12 months
- Taxpayer chooses to receive the refund through direct deposit; account information is on the form.

Address any questions via e-mail to NYSPLITMEF@tax.ny.gov

Personal Income Tax MeF publications and forms: http://www.tax.ny.gov/pit/efile/pit_mef_publications_2014.htm

Current Schema and State Spreadsheet available at: http://www.tax.ny.gov/bus/efile/swd_income.htm



Claim for New York City Enhanced Real Property Tax Credit

For Homeowners and Renters

NYC-208

Step 1 – Enter identifying information

Your first name		MI	Your last name (for a joint claim , enter spouse's name on line below)		Your date of birth (mmdyyyy)	Your social security number
Spouse's first name		MI	Spouse's last name		Spouse's date of birth (mmdyyyy)	Spouse's social security number
Current mailing address (number and street or PO box)					Apartment number	County of residence while living in New York City (see instructions)
City, village, or post office		State	ZIP code	Country (if not United States)		
Street address of New York City residence that qualifies you for this credit, if different from above					Apartment number	You must enter date(s) of birth and social security number(s) above.
City		State	ZIP code			
NY						

Step 2 – Determine eligibility (For lines 1 through 5, mark an **X** in the appropriate box.)

- 1 Were you a New York City resident for all of 2015? 1 Yes No
- 2 Did you occupy the same residence for at least six months during 2015? 2 Yes No
If you marked an **X** in the **No** box on line 1 or 2, **stop**; you do not qualify for this credit.
- 3 Can you be claimed as a dependent on another taxpayer's 2015 federal return? 3 Yes No
- 4 Did you reside in public housing, or other residence completely exempted from real property taxes in 2015? (see instr.) 4 Yes No
If you marked an **X** in the **Yes** box on line 3 or 4, **stop**; you do not qualify for this credit.
- 5 Did you live in a nursing home during 2015? (If you mark an **X** in the Yes box, see instructions.) 5 Yes No

6 Complete below for **all** household members (submit additional sheets if needed; see instructions).

A – First name	Last name	B – Social security number



Step 3 – Determine household gross income

Enter the total of all amounts, even if not taxable, that you, your spouse (if married), and all other household members received during 2015.

7	Federal adjusted gross income If any household members do not have to file a federal return, see instructions	7		00
8	New York State additions to federal adjusted gross income	8		00
9	Social security payments not included on line 7	9		00
10	Supplemental security income (SSI) payments	10		00
11	Pensions and annuities (including railroad retirement benefits) not included on lines 7 through 10	11		00
12	Cash public assistance and relief	12		00
13	Other income	13		00
14	Household gross income (add lines 7 through 13; see instructions)	14		00
If line 14 is \$200,000 or more, stop ; you do not qualify for this credit.				
15	Enter rate from Table 1 (see instructions)	15		
16	Multiply line 14 by line 15	16		00

Step 4 – Compute real property tax

Renters only	17	Enter the total amount of rent you and all members of your household paid during 2015. (Do not include any subsidized part of your rental charge.)	17		00
	18	Adjusted rent – If line 17 includes charges for: Enter on line 18 heat, gas, electricity, furnishings, and board..... 80% (.8) of line 17 heat, gas, electricity, and furnishings..... 90% (.9) of line 17 heat, gas, and electricity 92% (.92) of line 17 heat or heat and gas 94% (.94) of line 17 none of the above 100% of line 17	18		00
	19	Multiply line 18 by 15.75% (.1575); enter here and on line 23	19		00
	Homeowners only	20	Real property taxes paid during 2015 (see instructions).....	20	
21		Special assessments	21		00
22		Add lines 20 and 21; enter here and on line 23	22		00



Your social security number

Step 5 – Compute credit amount

23 Renters: Enter amount from line 19. Homeowners: Enter amount from line 22 (see instructions) 23 [] 00
If line 23 is zero or less, stop; no credit is allowed.
24 Enter amount from line 16 24 [] 00
If line 24 is equal to or more than line 23, stop; you do not qualify for this credit.
25 Subtract line 24 from line 23 25 [] 00
26 Enter rate from Table 2 (see instructions) 26 []
27 Multiply line 25 by the rate on line 26 27 [] 00
28 Credit limit 28 [] 500 00
29 Enter the amount from line 28 or 27, whichever is less. This is the credit for your household.
(If more than one member of your household is filing Form NYC-208, see instructions.) 29 [] 00
• If you are filing this claim with your New York State income tax return:
Enter the line 29 amount on Form IT-201, line 70a.
• If you are not filing this claim with a New York State income tax return (see instructions):
Mark one refund choice: [] direct deposit (fill in line 30) - or - [] debit card - or - [] paper check

Step 6 – Enter account information for direct deposit (see instructions)

If the funds for your refund would go to an account outside the U.S., mark an X in this box (see instructions) []

30 Direct deposit (see instructions): Complete the following to have your refund deposited directly to your bank account.
30a Account type: [] Personal checking - or - [] Personal savings - or - [] Business checking - or - [] Business savings
30b Routing number [] 30c Account number []

Third-party designee? (see instr.) Print designee's name Designee's phone number () Personal identification number (PIN)
Yes [] No [] E-mail:

Paid preparer must complete (see instructions) Preparer's NYTPRIN NYTPRIN excl. code
Preparer's signature Preparer's printed name
Firm's name (or yours, if self-employed) Preparer's PTIN or SSN
Address Employer identification number
Date
E-mail:

Taxpayer(s) must sign here
Your signature
Your occupation
Spouse's signature and occupation (if joint return)
Date Daytime phone number ()
E-mail:

- If you are filing a NYS income tax return, submit this form with your return.
• If you are not filing a NYS income tax return, mail this form to:
NYS TAX PROCESSING, PO BOX 22017, ALBANY NY 12201-2017

