



New York State Department of Taxation and Finance

Personal Income Tax MeF Acceptance Testing System for Tax Year 2015

TEST ID: 1026

Forms Included: IT-201, IT-112-R and IT-112-C

Test Notes: Complete the Application of Credit section on IT-112-R not IT-112-C

Return specific information:

- Prime taxpayer: Xander Xanadu born on 07-04-1976
- Filing Single; no dependent exemptions
- Taxpayer Chooses Standard Deduction
- Claims No Sales and Use Tax Owed
- Taxes paid to other states :

Vermont- \$460 tax imposed on \$4600 income

- Taxes paid to Canada:

Ontario- \$1200 tax imposed on \$7280 income

Address any questions via e-mail to NYSPITMEF@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

| |
|-----------------------------|
| Your social security number |
|-----------------------------|

Federal income and adjustments (see page 14)

Whole dollars only

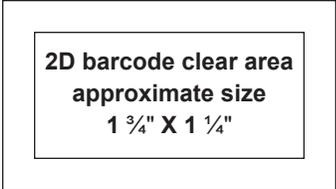
| | | | | |
|----|--|----|--|----|
| 1 | Wages, salaries, tips, etc. | 1 | | 00 |
| 2 | Taxable interest income | 2 | | 00 |
| 3 | Ordinary dividends | 3 | | 00 |
| 4 | Taxable refunds, credits, or offsets of state and local income taxes (also enter on line 25) | 4 | | 00 |
| 5 | Alimony received | 5 | | 00 |
| 6 | Business income or loss (submit a copy of federal Schedule C or C-EZ, Form 1040) | 6 | | 00 |
| 7 | Capital gain or loss (if required, submit a copy of federal Schedule D, Form 1040) | 7 | | 00 |
| 8 | Other gains or losses (submit a copy of federal Form 4797) | 8 | | 00 |
| 9 | Taxable amount of IRA distributions. If received as a beneficiary, mark an X in the box ... <input type="checkbox"/> | 9 | | 00 |
| 10 | Taxable amount of pensions and annuities. If received as a beneficiary, mark an X in the box <input type="checkbox"/> | 10 | | 00 |
| 11 | Rental real estate, royalties, partnerships, S corporations, trusts, etc. (submit copy of federal Schedule E, Form 1040) | 11 | | 00 |
| 12 | Rental real estate included in line 11 | 12 | | 00 |
| 13 | Farm income or loss (submit a copy of federal Schedule F, Form 1040) | 13 | | 00 |
| 14 | Unemployment compensation | 14 | | 00 |
| 15 | Taxable amount of social security benefits (also enter on line 27) | 15 | | 00 |
| 16 | Other income (see page 14) Identify: | 16 | | 00 |
| 17 | Add lines 1 through 11 and 13 through 16 | 17 | | 00 |
| 18 | Total federal adjustments to income (see page 14) Identify: | 18 | | 00 |
| 19 | Federal adjusted gross income (subtract line 18 from line 17) | 19 | | 00 |

New York additions (see page 15)

| | | | | |
|----|--|----|--|----|
| 20 | Interest income on state and local bonds and obligations (but not those of NYS or its local governments) | 20 | | 00 |
| 21 | Public employee 414(h) retirement contributions from your wage and tax statements (see page 15) | 21 | | 00 |
| 22 | New York's 529 college savings program distributions (see page 15) | 22 | | 00 |
| 23 | Other (Form IT-225, line 9) | 23 | | 00 |
| 24 | Add lines 19 through 23 | 24 | | 00 |

New York subtractions (see page 16)

| | | | | |
|----|--|----|--|----|
| 25 | Taxable refunds, credits, or offsets of state and local income taxes (from line 4) | 25 | | 00 |
| 26 | Pensions of NYS and local governments and the federal government (see page 16) | 26 | | 00 |
| 27 | Taxable amount of social security benefits (from line 15) | 27 | | 00 |
| 28 | Interest income on U.S. government bonds | 28 | | 00 |
| 29 | Pension and annuity income exclusion (see page 16) | 29 | | 00 |
| 30 | New York's 529 college savings program deduction/earnings | 30 | | 00 |
| 31 | Other (Form IT-225, line 18)..... | 31 | | 00 |
| 32 | Add lines 25 through 31 | 32 | | 00 |
| 33 | New York adjusted gross income (subtract line 32 from line 24) | 33 | | 00 |



Standard deduction or itemized deduction (see page 18)

| | | | | |
|----|---|----|--|--------|
| 34 | Enter your standard deduction (table on page 18) or your itemized deduction (from Form IT-201-D) Mark an X in the appropriate box: <input type="checkbox"/> Standard - or - <input type="checkbox"/> Itemized | 34 | | 00 |
| 35 | Subtract line 34 from line 33 (if line 34 is more than line 33, leave blank) | 35 | | 00 |
| 36 | Dependent exemptions (enter the number of dependents listed in item H; see page 18) | 36 | | 000 00 |
| 37 | Taxable income (subtract line 36 from line 35) | 37 | | 00 |



Name(s) as shown on page 1

Your social security number

Tax computation, credits, and other taxes

Table with 3 columns: Line number, Description, and Amount. Rows include Taxable income (38), NYS tax on line 38 amount (39), NYS household credit (40), Resident credit (41), Other NYS nonrefundable credits (42), Add lines 40, 41, and 42 (43), Subtract line 43 from line 39 (44), Net other NYS taxes (45), and Total New York State taxes (46).

New York City and Yonkers taxes, credits, and surcharges, and MCTMT

Table with 3 columns: Line number, Description, and Amount. Rows include NYC resident tax on line 38 amount (47), NYC household credit (48), Subtract line 48 from line 47 (49), Part-year NYC resident tax (50), Other NYC taxes (51), Add lines 49, 50, and 51 (52), NYC nonrefundable credits (53), Subtract line 53 from line 52 (54), MCTMT net earnings base (54a), MCTMT (54b), Yonkers resident income tax surcharge (55), Yonkers nonresident earnings tax (56), Part-year Yonkers resident income tax surcharge (57), Total New York City and Yonkers, taxes / surcharges and MCTMT (58), and Sales or use tax (59).

See instructions on pages 20, 21, and 22 to compute New York City and Yonkers taxes, credits, and surcharges, and MCTMT.

2D barcode clear area approximate size 1 3/4" X 1 1/4"

Voluntary contributions (see page 24)

Table with 3 columns: Line number, Description, and Amount. Rows include 60a Return a Gift to Wildlife, 60b Missing/Exploited Children Fund, 60c Breast Cancer Research Fund, 60d Alzheimer's Fund, 60e Olympic Fund (\$2 or \$4; see page 24), 60f Prostate and Testicular Cancer Research and Education Fund, 60g 9/11 Memorial, 60h Volunteer Firefighting & EMS Recruitment Fund, 60i Teen Health Education, 60j Veterans Remembrance, 60k Homeless Veterans, Total voluntary contributions (60), and Total New York State, New York City, Yonkers, and sales or use taxes, MCTMT, and voluntary contributions (61).

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Your social security number

62 Enter amount from line 61 62 00

Payments and refundable credits (see page 25)

Table with 3 columns: Line number, Description, Amount. Rows include Empire State child credit, Family tax relief credit, NYS/NYC child and dependent care credit, etc.

2D barcode clear area approximate size 1 3/4" X 1 1/4"

If applicable, complete Form(s) IT-2 and/or IT-1099-R and submit them with your return (see page XX).

76 Total payments (add lines 63 through 75) 76 00

Your refund, amount you owe, and account information (see pages 27 through 30)

77 Amount overpaid (if line 76 is more than line 62, subtract line 62 from line 76) 77 00

78 Amount of line 77 to be refunded. Mark one refund choice: direct deposit, debit card, or paper check ... 78 00

79 Amount of line 77 that you want applied to your 2016 estimated tax (see instructions) 79 00

See pages 27 and 28 for information about your three refund choices.

80 Amount you owe (if line 76 is less than line 62, subtract line 76 from line 62). To pay by electronic funds withdrawal, mark an X in the box and fill in lines 83 and 84. If you pay by check or money order you must complete Form IT-201-V and mail it with your return. 80 00

See page 29 for payment options.

81 Estimated tax penalty (include this amount in line 80 or reduce the overpayment on line 77; see page 28) 81 00

See page 31 for the proper assembly of your return.

82 Other penalties and interest (see page 29) 82 00

83 Account information for direct deposit or electronic funds withdrawal (see page 29). If the funds for your payment (or refund) would come from (or go to) an account outside the U.S., mark an X in this box (see pg. 29) []

83a Account type: [] Personal checking - or - [] Personal savings - or - [] Business checking - or - [] Business savings

83b Routing number [] 83c Account number []

84 Electronic funds withdrawal (see page 30) Date [] Amount [] 00

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

Paid preparer must complete (see instructions) Preparer's NYTPRN, NYTPRN excl. code, Preparer's signature, Preparer's printed name, Firm's name, 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:

See instructions for where to mail your return.

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New York State Resident Credit for Taxes Paid to a Province of Canada

IT-112-C

Complete this form if you want to claim a resident credit or if you have an addback for taxes paid to a province of Canada.

| | |
|----------------------------|---------------------------------------|
| Name(s) as shown on return | Identifying number as shown on return |
|----------------------------|---------------------------------------|

Submit this form and a copy of federal Form 1116 with Form IT-201, IT-203, or IT-205. Failure to do so will delay any refund to which you may be entitled or, if you owe taxes, could result in late-filing penalties. If you are not required to file federal Form 1116, see instructions.

| Part 1 – Income and adjustments <i>(see instructions)</i> | A Amount reported on New York State return | B Amount sourced to and taxed by the Canadian province |
|--|--|--|
| Report all amounts in U.S. dollars. | Whole dollars only | Whole dollars only |
| 1 Wages, salaries, tips, etc. | 1 .00 | 1 .00 |
| 2 Taxable interest income..... | 2 .00 | 2 .00 |
| 3 Ordinary dividends | 3 .00 | 3 .00 |
| 4 Taxable refunds, credits, or offsets of state and local income taxes..... | 4 .00 | 4 .00 |
| 5 Alimony received..... | 5 .00 | 5 .00 |
| 6 Business income or loss..... | 6 .00 | 6 .00 |
| 7 Capital gain or loss..... | 7 .00 | 7 .00 |
| 8 Other gains or losses | 8 .00 | 8 .00 |
| 9 Taxable amount of IRA distributions..... | 9 .00 | 9 .00 |
| 10 Taxable amount of pensions and annuities | 10 .00 | 10 .00 |
| 11 Rental real estate, royalties, partnerships, S corporations, trusts, etc..... | 11 .00 | 11 .00 |
| 12 Farm income or loss..... | 12 .00 | 12 .00 |
| 13 Unemployment compensation..... | 13 .00 | 13 .00 |
| 14 Taxable amount of social security benefits..... | 14 .00 | 14 .00 |
| 15 Other income..... | 15 .00 | 15 .00 |
| 16 Add lines 1 through 15 | 16 .00 | 16 .00 |
| 17 Total federal adjustments to income..... | 17 .00 | 17 .00 |
| 18 Federal adjusted gross income <i>(subtract line 17 from line 16)</i> | 18 .00 | 18 .00 |
| 19 New York adjustments <i>(see instructions)</i> | 19 .00 | 19 .00 |
| 20 New York adjusted gross income <i>(line 18 and add or subtract line 19; see instructions)</i> | 20 .00 | 20 .00 |
| 21 Capital gain portion of lump-sum distributions <i>(see instr.)</i> ... | 21 .00 | 21 .00 |
| 22 Add lines 20 and 21..... | 22 .00 | 22 .00 |

(continued)



Report all amounts in U.S. dollars.

Part 2 – Computing your resident credit or addback for taxes paid to a province of Canada

If any portion of the Canadian provincial income tax that entitled you to a New York State credit is claimed as a foreign tax credit on your federal return in a succeeding tax year, the amount claimed must be added back to your New York State tax liability for that succeeding tax year.

| | | | |
|----|--|----|-----|
| 23 | Enter the two-letter abbreviation of the Canadian province where tax was paid (see instr.) | 23 | |
| 24 | Enter the amount from federal Form 1116, line 9, pertaining to this year's income taxes imposed by the above Canadian province (see instructions) | 24 | .00 |
| 25 | Enter the amount from federal Form 1116, line 12, pertaining to the reduction in foreign taxes paid to the above Canadian province | 25 | .00 |
| 26 | Enter the amount from line 24 that was carried back and claimed as a credit for federal purposes..... | 26 | .00 |
| 27 | Add lines 25 and 26..... | 27 | .00 |
| 28 | Subtract line 27 from line 24..... | 28 | .00 |
| 29 | Enter the amount from federal Form 1116, line 10, pertaining to carryover of taxes paid for prior years to the above Canadian province (submit a copy of federal Form(s) 1116) | 29 | .00 |
| 30 | Add lines 28 and 29..... | 30 | .00 |
| 31 | Enter the amount from federal Form 1116, line 22, pertaining to this year's foreign tax credit for taxes paid to the above Canadian province | 31 | .00 |
| 32 | Subtract line 31 from line 30..... | 32 | .00 |
| 33 | New York State tax payable (see instructions) | 33 | .00 |
| 34 | Divide line 22, column B, by line 22, column A (round to the fourth decimal place; see instructions) | 34 | |
| 35 | Multiply line 33 by line 34 | 35 | .00 |
| 36 | Tentative credit (enter the lesser of line 28, 32, or 35)..... | 36 | .00 |
| 37 | Enter the amount from line 29..... | 37 | .00 |
| 38 | Enter the amount from line 31 | 38 | .00 |
| 39 | Subtract line 38 from line 37 (if line 38 is more than line 37, leave blank) | 39 | .00 |
| 40 | Add lines 36 and 39..... | 40 | .00 |
| 41 | Enter the prior-year(s) resident credit claimed on Form(s) IT-112-R or IT-112-C for taxes paid to Canadian province(s) (see instructions) | 41 | .00 |
| 42 | If line 41 is more than line 40, subtract line 40 from line 41. This is your addback of resident credit (see instructions; do not make any entries on lines 43 through 50) | 42 | .00 |
| 43 | If line 41 is less than (or equal to) line 40, subtract line 41 from line 40 | 43 | .00 |
| 44 | Enter the amount from line 36 or line 43, whichever is less (see instructions) | 44 | .00 |
| 45 | Total line 44 amounts from additional Form(s) IT-112-C and line 28 amounts from Form(s) IT-112-R, if any (see instructions) | 45 | .00 |
| 46 | Add lines 44 and 45 | 46 | .00 |

Part 3 – Application of credit

| | | | |
|----|--|----|-----|
| 47 | Tax due before credits (see instructions) | 47 | .00 |
| 48 | Other credits that you applied before this credit (see instructions) | 48 | .00 |
| 49 | Subtract line 48 from line 47 | 49 | .00 |
| 50 | Enter the amount from line 46 or line 49, whichever is less (see instructions) | 50 | .00 |



Part 4 – Information from your Canadian federal and/or provincial returns

You are not **required** to submit a copy of the return you filed with a province of Canada with Form IT-201, IT-203, or IT-205. Submitting a copy of the provincial return is **optional**. You are still required to submit a copy of federal Form 1116 (if filed). However, you may be required to furnish a copy of your Canadian provincial return at a later date. Whether or not you submit a copy of the provincial return with Form IT-201, IT-203, or IT-205, you **must** complete this section.

51 Enter the amount of your provincial tax..... **51** .00

Note: For lines 52 through 55, provinces other than Quebec should use the *Canada* column.

| | Canada | | Quebec | |
|--|-----------|-----|-----------|-----|
| 52 Enter your total tax payable (<i>see instructions</i>) | 52 | .00 | 52 | .00 |
| 53 Enter the amount of your prepayments (<i>see instructions</i>) | 53 | .00 | 53 | .00 |
| 54 Enter the amount of overpayment, if any, shown on the return you filed with Canada or Quebec | 54 | .00 | 54 | .00 |
| 55 Enter the balance due, if any, shown on the return you filed with Canada or Quebec (<i>see instructions</i>) | 55 | .00 | 55 | .00 |





New York State Resident Credit

IT-112-R

Complete this form if you want to claim a resident credit for taxes paid to another state, local government, or the District of Columbia.

| | |
|----------------------------|---------------------------------------|
| Name(s) as shown on return | Identifying number as shown on return |
|----------------------------|---------------------------------------|

Submit this form with Form IT-201, IT-203, or IT-205. Failure to do so will delay any refund to which you may be entitled or, if you owe taxes, could result in late-filing penalties.

| Part 1 – Income and adjustments <i>(see instructions)</i> | A Amount reported on New York State return | B Amount sourced to and taxed by other taxing authority |
|---|---|--|
| | Whole dollars only | Whole dollars only |
| 1 Wages, salaries, tips, etc. | 1 .00 | 1 .00 |
| 2 Taxable interest income..... | 2 .00 | 2 .00 |
| 3 Ordinary dividends | 3 .00 | 3 .00 |
| 4 Taxable refunds, credits, or offsets of state and local income taxes..... | 4 .00 | 4 .00 |
| 5 Alimony received..... | 5 .00 | 5 .00 |
| 6 Business income or loss..... | 6 .00 | 6 .00 |
| 7 Capital gain or loss..... | 7 .00 | 7 .00 |
| 8 Other gains or losses | 8 .00 | 8 .00 |
| 9 Taxable amount of IRA distributions..... | 9 .00 | 9 .00 |
| 10 Taxable amount of pensions and annuities | 10 .00 | 10 .00 |
| 11 Rental real estate, royalties, partnerships, S corporations, trusts, etc..... | 11 .00 | 11 .00 |
| 12 Farm income or loss..... | 12 .00 | 12 .00 |
| 13 Unemployment compensation..... | 13 .00 | 13 .00 |
| 14 Taxable amount of social security benefits..... | 14 .00 | 14 .00 |
| 15 Other income..... | 15 .00 | 15 .00 |
| 16 Add lines 1 through 15 | 16 .00 | 16 .00 |
| 17 Total federal adjustments to income..... | 17 .00 | 17 .00 |
| 18 Federal adjusted gross income <i>(subtract line 17 from line 16)</i> | 18 .00 | 18 .00 |
| 19 New York adjustments <i>(see instructions)</i> | 19 .00 | 19 .00 |
| 20 New York adjusted gross income <i>(line 18 and add or subtract line 19; see instructions)</i> | 20 .00 | 20 .00 |
| 21 Capital gain portion of lump-sum distributions <i>(see instr.)</i> .. | 21 .00 | 21 .00 |
| 22 Add lines 20 and 21..... | 22 .00 | 22 .00 |

(continued on back)



Part 2 – Computing your resident credit for taxes paid to another state, local government, or the District of Columbia

23 Enter the two-letter abbreviation of the other state, including the District of Columbia, where tax was paid (*see instructions*)..... **23**

Also enter the locality name, if applicable Locality name:

24 Enter the amount of income tax imposed on this year's return for the other state or local government (*see instructions*) **24** .00

If the taxes were paid on a group (composite) return, then mark an **X** in the box.....

Enter the group's EIN

25 New York State tax payable (*see instructions*) **25** .00

26 Divide line 22, column B, by line 22, column A (*round to the fourth decimal place; see instructions*) **26**

27 Multiply line 25 by line 26 **27** .00

28 Enter amount from line 24 or line 27, whichever is less (*see instructions*) **28** .00

29 Total line 28 amounts from additional Form(s) IT-112-R and line 44 amounts from Form(s) IT-112-C, if any (*see instructions*) **29** .00

30 Add lines 28 and 29 **30** .00

Part 3 – Application of Credit

31 Tax due before credits (*see instructions*) **31** .00

32 Other credits that you applied before this credit (*see instructions*) **32** .00

33 Subtract line 32 from line 31 **33** .00

34 Enter the amount from line 30 or line 33, whichever is less (*see instructions*) **34** .00

Part 4 – Information from your return filed with the other state, local government, or the District of Columbia

You are not **required** to submit a copy of the return you filed with the other state or local government with Form IT-201, IT-203, or IT-205. Submitting a copy of the other return is **optional**. However, you may be required to furnish a copy of the other return at a later date. Whether or not you submit a copy of the other return, you **must** complete this section.

35 Enter the total amount of tax withheld for and/or amount of estimated tax payments made to the other state, local government, or the District of Columbia (*see instructions*)..... **35** .00

36 Enter the amount of overpayment, if any, shown on the return you filed with the other state, local government, or the District of Columbia (*see instructions*)..... **36** .00

37 Enter the balance due, if any, shown on the return you filed with the other state, local government, or the District of Columbia (*see instructions*)..... **37** .00

