

New York State Fiduciary Income Tax Return e-File Record Layouts Changes # 1 (11/09/2009)

This download contains only the form layouts where updates were made as detailed below.

AHEADR

Field# 0270c.: Field defined to collect Name Control as on the IRS 1041 record

Note: Changes to the last release are indicated by '11/9' in the first column (Update) of the record layout, with the actual changes bolded.

IT-205 Fiduciary Income Tax Return - Header - State Entity Record (AHEADER)

Tax Year 2009

Update	IRS Field#	Form Ref	Identification	Len		Field Description / Edits & Validations
			Byte Count	4	N	Variable record size
			Record Sentinel	4		*****
	0000		Record ID	6		"STATEb" (b = blank character)
	0001		Type (Form Number)	6		"AHEADR"
	0002		Page Number	5		"PG01b" (b = blank character)
	0003		Employer Identification Number (EIN)	9	N	Must = EIN on Federal Form 1041
	0004		Filler	1		Space
	0005		Form Occurrence Number	2	N	"01"
	0006		Filler	5		Spaces
	0010		State Code	2		"NY"
	0020		Filler	1		Unused
	0030		a. Decedent SSN	9	N	Spaces if not present
10/21			b. Tax Period	6		Same as IRS 1041 Field 0005 For calendar year filer, must = 200912 For fiscal year filer, must = 201001, 201002, 201003, 201004, 201005 or 201006
			c. Qualifying Special Conditions - 1	2	AN	
			d. Qualifying Special Conditions - 2	2	AN	
			e. Electronic Postmark Date	8	N	YYYYMMDD, same as IRS Summary Record
	0040	Sch C, 1a	a. Street Address of Beneficiary	30	AN	Use CATTCH record if more than 1 beneficiary
		Sch C, 1a	b. City/State of Beneficiary	20	A	Use CATTCH record if more than 1 beneficiary
		Sch C, 1a	c. ZIP Code of Beneficiary	9	N	Use CATTCH record if more than 1 beneficiary
			d. Preparer SSN or PTIN	9	N	
			e. Preparer EIN	9	N	
			f. Fiduciary PIN	5	N	5 digit self-select PIN (must not = 00000)
			g. ERO/Preparer PIN	11	N	EFIN + 5 digit self-select PIN (must not = 00000)
	0050		Name of Estate or Trust	35	AN	Must be present; no leading spaces
	0060		Name of Fiduciary	35	AN	Must be present; no leading spaces
	0070	Sch C, 1a	Name of Beneficiary	35	AN	Use CATTCH record if more than 1 beneficiary

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Update	IRS Field#	Form Ref	Identification	Len	Field Description / Edits & Validations
	0080		a. Address of Fiduciary	30	AN Note: NY allows only 30 characters where as the IRS allows 35
			b. Filler	5	Spaces
10/21	0090		a. Preparer's Firm Name (or Self-Employed Preparer's Name)	34	AN Cannot = "PREPARER"
			b. Self-Employed Indicator	1	AN "X" if self-employed
	0100		City of Fiduciary	22	A
	0110		a. Julian Date of Transmission	3	N Same as IRS TRANA record
			b. Filler (00)	2	Must = "00"
	0120		State of Fiduciary	2	A
	0130		a. ZIP-5 of Fiduciary	5	N
			b. ZIP-4 of Fiduciary	4	N
			c. Filler	3	Unused
	0140		County	20	Unused
	0150		County Code	5	Unused
	0160		Telephone Number of Fiduciary	12	N
	0170		Date Created	8	N MMDDYYYY
	0180		a. Type of Entity	1	A "D" = Descent's estate "S" = Simple trust "C" = Complex trust "Q" = Qualified disability "E" = ESBT "G" = Grantor "P" = Pooled Note: Bankruptcy excluded
10/21			b. Third-Party Designee Name	17	AN Cannot = "PREPARER"
			c. Third-Party Designee Phone Number	10	
	0190		Initial Return	1	"X" = Box checked Blank = Box not checked
	0200		Amended Return	1	NO ENTRY – excluded
	0210		Final Return	1	"X" = Box checked Blank = Box not checked
	0220		a. Filler	1	Spaces

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Update	IRS Field#	Form Ref	Identification	Len	Field Description / Edits & Validations
		Sch C, 1a	b. Yonkers Nonresident Indicator	1	(1 st beneficiary) "X" = Box checked Blank character = Box not checked
			c. Filler	1	Space
			d. Income Distribution Deduction	12	N Must be present, including zero, if BATTCH is present Leading zeroes, 11 digits and a space; for example "00000175000 "
			e. Filler	1	Space
			f. Filler	2	N Spaces
			g. Number of Beneficiaries	3	N 3 digits; for example "012"
			h. Filler	1	Unused
	0230	Sch C, 2a	a. ID of Beneficiary	9	AN 1 st beneficiary on Schedule C
		Sch C, 3a	b. Fed Distributable Net Income Amt	12	N Leading zeroes, 11 digits, and a space; for example "00000175000 "
			c. Filler	1	Unused
	0240	Sch C, 4a	a. Fed Distributable Net Income Percentage	3	R 1st beneficiary on Schedule C; left justified, zero-filled, no decimal point entered (assumed to be between the 1st and 2nd digit); for example "100" = 1.00, "010" = 0.10, "001" = 0.01
		Sch C, 5a	b. NY Fiduciary Adjustment	12	N Leading zeroes, 11 digits, and a space; for example "00000175000 "
			c. Transmitter's ETIN	5	N Must be present and = ETIN on federal return
			d. Filler	1	Space
			e. Authorize Tax Dept. to Discuss Return w/ Third Party Designee	1	N "1" = Yes (Third party designee PIN, Field 0250b must be present) "2" = No
	0250		a. ERO's EFIN	6	N Must be present and = EFIN on the Federal return
			b. Third Party Designee PIN	5	N Must be present if Field 0240e = "1"
		Sch C-G	c. If Grantor Trust, SSN/EIN of Individual Reporting Income	9	N
			d. Filler	2	Unused
	0260		a. Fiscal Year Beginning	8	N Format: YYYYMMDD, same as on IRS 1041 Record
			b. Fiscal Year Ending	8	N Format: YYYYMMDD, same as on IRS 1041 Record
			c. Filler	6	Unused
	0270		a. Software Developer ID	10	AN Must be present and approved by NYS
10/21			b. Filler Preparer NYTPRIN	8	N Must be > 10000000 or blank

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11/9			c. Name Control	4	AN	Same as on IRS 1041 Record
			Record Terminus	1		#