Commonwealth of Kentucky

Kentucky Department of Revenue

Modernized Electronic Filing System (MeF)

Return Functions Shared By All Security Levels

DOR User's Guide

Version 1.4

March 21, 2016

Document History

Version	Date	Changes
1.0	11/10/2012	Posted to KREW
1.1	7/22/2013	Add Form 740 NP to document and posted to KREW.
1.2	1/11/2015	Revised Document. Added information on Device Identification Number, Ultimate Account Number and electronic filing of Form 40A102
1.3	1/14/2016	Changes for TY2015
1.4	3/21/2016	Added information on processing paper filed returns to MeF

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Introduction

The Individual Income Tax Modernized Electronic Filing System (MeF) went into Production in August 2011 as the means for processing electronic returns. The electronic data is retrieved from the IRS and the download is referred to as a submission. The submission is passed through a set of edits known as business rules to determine if the submission will be accepted by DOR or rejected back to the submitter. The determination acknowledgement is sent back to the IRS for the transmitter to retrieve.

Resident individual income tax returns (Form 740 series), nonresident and part-year resident returns (Form 740-NP series), applications for extension of time to file (Form 40A102), and FormEPAY can be electronically filed. The prior year and amended returns cannot be electronically filed at this time and the paper filed returns

Paper filed returns will be transmitted from the 3rd party vendor, SourceHOV, to MeF instead of ELF beginning with tax year 2015.

The purpose of this document is to guide DOR staff through the navigation of the Return Section of the Modernized Electronic Filing (MeF) system. This document includes a description of menus, options, functions, screens, fields and work flows for performing your daily activities through the Main Menu Option - Return.

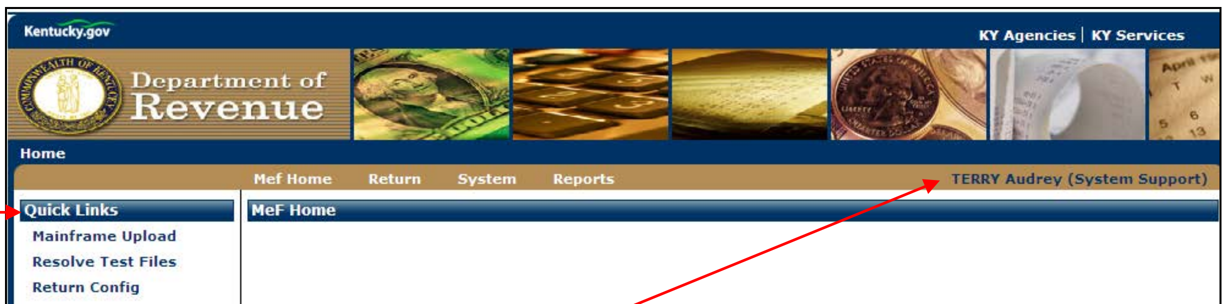
Login

To access MeF, click on the Modernized eFile link located on the KREW website below the ELF link.

Logout

As with any other web-based system, close the browser by clicking the X at the top right or selecting Exit from the drop down list under File to logout.

1.0 MeF Home Screen



On successful login, the user will be navigated to MeF Home page. This is a landing page that allows the user to select links to different functions or web pages.

User Security Level

The user's last name and first name are listed with assigned MeF system security level displayed in parenthesis. Access to different menu options is based on the security level assigned to the individual through DOR Security. If you have questions about how to request access to MeF or determining the appropriate security level, please contact the Electronic Filing Section (See Appendix A).

Quick Links

The Quick Links are shortcuts to MeF functions. The quick links are accessible based on the security level assigned to the user. Only the most used links available to the security level assigned will be displayed.

MeF Banner

The banner will be displayed on all the screens found in MeF.

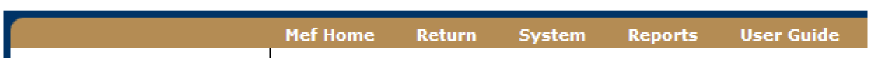
Department of Revenue Banner

Clicking on the Department of Revenue seal or “Home” link in the banner area navigates the user to the Department of Revenue (DOR) website.

Kentucky.Gov Links

Kentucky.gov, KY Agencies and KY Services links are provided on the banner area. Clicking Kentucky.gov navigates user to Kentucky.gov home page. Clicking KY Agencies navigates user to “Commonwealth of Kentucky Organizational Structure” page. Clicking Kentucky Services navigates user to “Online Services” page that has links to various state services.

Main Menu



The menu lists the different options within the MeF system. There are five main menu options: MeF Home, Return, System, Reports and User Guide. This document provides information on the MeF Home and Return menu options only.

2.0 Main Menu Option - Return

The Return menu option is available to all users; however, not all of the functions under Return are available to every security level.

The functions include: Return Search, Return Errors, Submission Errors, Resolve Test Files, MF Format Convert and Mainframe Upload

Only the Return Search function will be covered in this document. The default page under the Return menu is the Return Search Screen. This option allows a user to search, retrieve and vie w a return for current or prior years. All security levels have access to this function.

2.1 Return Search Function

The user is navigated to Return Search screen on the selection of the Return option which is available on the Main menu. The Return Search screen allows user to search completed returns by ***taxpayer name or SSN***.

Search Type Field

The Search Type drop-down list provides the ability to select either Name or SSN for the search criteria. SSN is selected as a default. A taxpayer SSN text box is displayed on selection of SSN. Taxpayer or spouse's last name and/or first name text boxes are displayed on selection of Name.

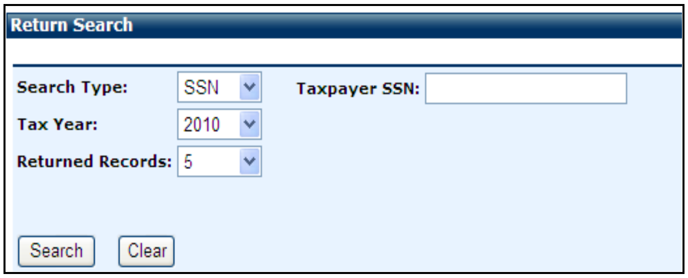
Tax Year Field

This drop-down list provides available tax years. The desired tax year can be selected. Current tax year is selected as default.

Returned Records Field

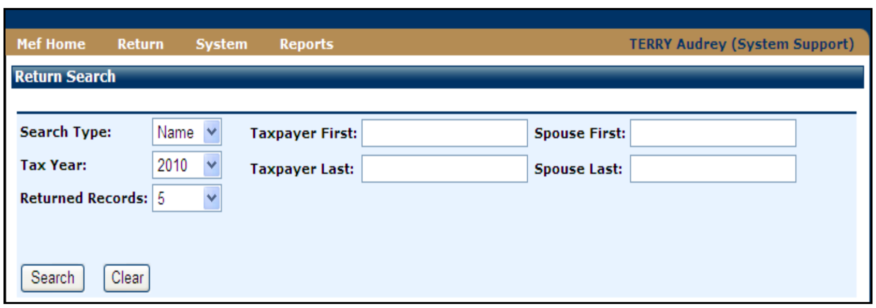
This is a Returned Records drop-down list to limit the number of search results. The values include 5, 10, 15, 20, 25, 50 and 100. The default value is 5.

Search by SSN Instructions



1. Select SSN in Search Type
2. Enter primary or secondary taxpayer SSN # in the Taxpayer SSN field (Dashes are allowed but not required)
3. Select Tax Year
4. Select the number of returned records
5. Click Search button

Search by Name Instructions



1. Select Name in Search Type
2. Enter Taxpayer and /spouse name
3. Select Tax Year
4. Select Returned records
5. Click Search button

There is a 35 character limit on the name field. Enter few letters of the name to broaden the search. Enter many letters in the name to narrow the search.

Search Results Field

5 Item(s) Found

Taxpayer SSN	Spouse SSN	Taxpayer Name	Return Type	Status Code
400-00-4203		Test C Credit-Forward	KYForm740	C
400-00-4204	400-00-4214	Test D Elderly & Denise Elderly	KYForm740	C
400-00-4208	400-00-4218	TEST J JONES & SUSAN B JONES	KYForm740NP	C
400-00-4210	400-00-4220	TEST PAY & JULIE PAY	KYForm40A102	A
400-00-4207	400-00-4217	Test H Smith & Jane S Smith	KYForm740NP	C

Taxpayer SSN	Spouse SSN	Taxpayer Name	Return Type	Status Code
400-00-4327	400-00-4337	Test D Elderly & Denise Elderly	KYForm740Paper	A
400-00-4304	400-00-4314	Test D Elderly & Denise Elderly	KYForm740Paper	A
400-00-4326	400-00-4336	Test D Elderly & Denise Elderly	KYForm740Paper	A
400-00-4212	400-00-4222	Test Epay & Julie Epay	KYFormEPAY	A
400-00-4212	400-00-4222	Test Epay & Julie Epay	KYFormEPAY	A
400-00-4213	400-00-4223	Test EpayNoticeNumber & Nora EpayNoticeNumber	KYFormEPAY	A
400-00-4305		Test E Evans	KYForm740Paper	A
400-00-4308		TEST J JONES	KYForm740NPPaper	A

The search results are displayed below the search options. If no match is found, a message, “0 Item(s) Found” will be displayed.

There could be multiple pages of results identified by page numbers at the bottom of the results. The user can select desired page. The page is limit is set to display 15 results.

The Taxpayer SSN, Spouse SSN, Taxpayer Name, Return Type and Status Code fields and the count of search results are displayed for all matching results.

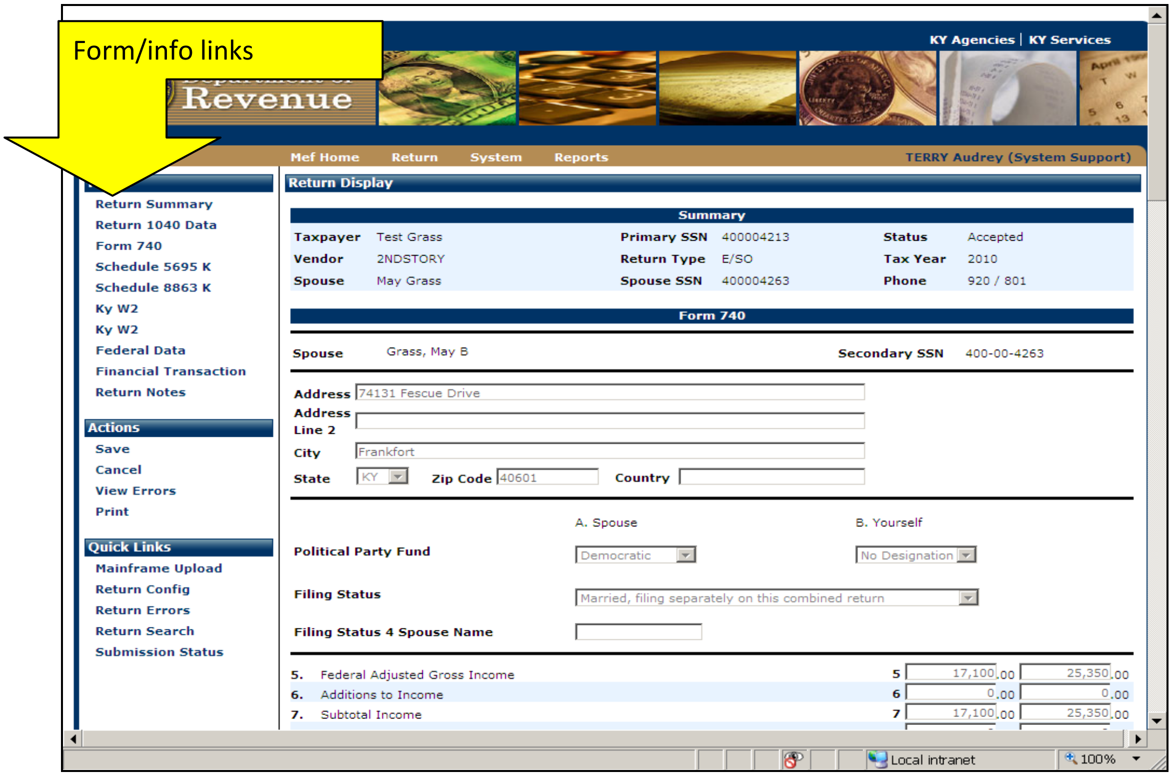
Return Type field – The field indicates the form name. The return type will indicate KYFORM740 for the Form 740 returns, KYFORM740NP for the Form 740-NP returns, KYForm40A102 for the Form 40A102, KYFormEPAY for Form EPAY, KYForm740Paper for the resident paper returns, KYForm740NPPaper for the nonresident or part-year resident returns. (See the screen samples above.)

Status Code field – The field indicates the acknowledgement code assigned to the submission after it goes through the business rule edits or is manually reviewed by the Electronic Filing Coordination Section. The codes are:

- A = Accepted. The return will be accepted for processing. This doesn’t mean the return is accurate.
- C = Accepted. The return will be accepted for processing. However, the return is flagged for review on the mainframe and will appear on PF-16. The reviewer enters comments on the MeF notes screen to advise what is being flagged for review.
- R = Rejected. The return will not be accepted for processing. The reject reason is listed on the Summary screen of MeF.

The user can click on taxpayer’s SSN link to view the return in detail through the Return Display.

2.2 Return Display



The Return Display screen provides detailed information about taxpayer's return. The user is navigated to this screen on the click of taxpayer SSN from search results. The forms attached to the return will be displayed under the Forms function menu.

For the Form 740 series the following forms are available through MeF for electronic filed returns: Form 740, Schedule M, Schedule A, Schedule J, Schedule KNOL, Schedule P, Form 2210-K, Form 4562-K, Form 4972-K, Form 5695-K, Form 8582-K, Form 8863-K, Worksheet A, Worksheet C, Worksheet D, W-2, W-2G, 1099-B, 1099-G, 1099-DIV, 1099-INT, 1099-Misc, 1099-OID and 1099-R.

For the Form 740-NP series the following forms are available through MeF for electronic filed returns: Form 740 NP, Schedule A NP, Schedule J, Schedule KNOL, Schedule ME, Schedule P, Form 2210-K, Form 4562-K, Form 4972-K, Form 5695-K, Form 8582-K, Form 8863-K, Worksheet A, Worksheet C, KY PTE-WH, W-2, W-2G, 1099-B, 1099-G, 1099-DIV, 1099-INT, 1099-Misc, 1099-OID and 1099-R.

The Form 40A102 was added to MeF in January 2015. Only the Form 40A102 is expected through MeF when filing a state extension.

Form EPAY was added in January 2016. This electronic only form allows payments of tax due and scheduled estimate payments to be processed through the MeF system. Payments will be allowed either as to a specific notice number or to a tax year.

Separate links are provided for these forms. None of the forms can be edited through the Return option. The forms in MeF were designed to flow like the actual form. The entire form can be viewed by scrolling up and down. In addition to the forms screens, there is a Return Summary screen, Return 1040 Data screen, Federal Schedule C, Federal Schedule C-EZ, Federal Data tree view, Financial Transaction screen, Reject Codes screen (if applicable), and Return Notes screen.

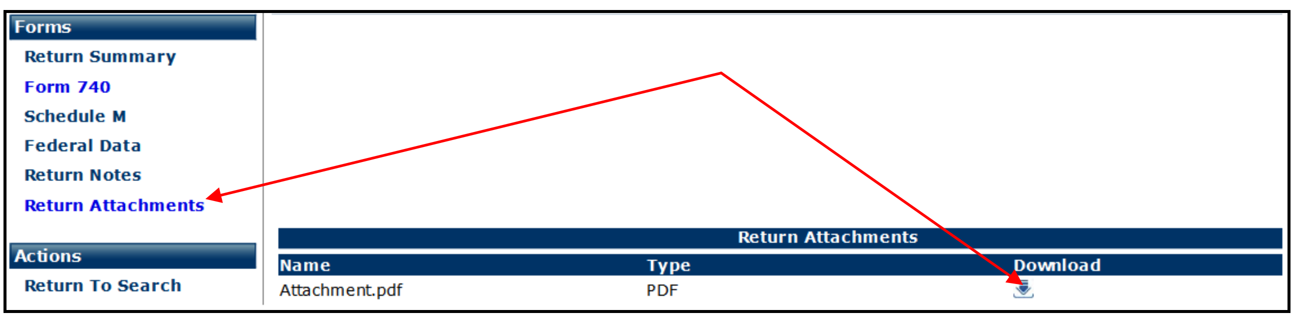
Paper Filed Returns

Limitations on data collection for paper filed returns will result in some differences in the return display when compared to electronically filed returns. Unavailable or missing data for required text fields on the paper forms will be filled with the word "PAPER". Unavailable or missing data for amount fields will be filled with a zero "0". Examples for missing Last Name and Relationship data for dependents and missing personal tax credit calculations on Form 740 are below.

First Name	Last Name	Social Security Number	Relationship	FSTC Qualifier
TED	PAPER	888-88-8888	PAPER	✓
DARLA	PAPER	888-88-8888	PAPER	✓

3. Total Credits on Lines 1 & 2	**3A**	2	**3B**	2
		X $10		**X $10**
4. Line 3 total times $10	**4A**	0	**4B**	0

A scanned copy of all paper returns will be available from within MeF in addition to Fastrieve. The scanned image may be accessed using the **Return Attachments** link under the **Forms** menu and clicking the **Download** icon.



Return Summary Screen

Summary

Taxpayer	Test B Boone	**Primary SSN**	400-00-4202	**Status**	Conditional
Vendor	DORTEST	**Return Type**	E	**Tax Year**	2014
Spouse		**Spouse SSN**		**Phone**	(502) 564-7862

Error Codes Sent to Mainframe

7C	Railroad maint/improve credit has been adjusted or disallowed due to missing Sch RR-I
4A	Error on return-Multiple contributions eliminated for Vet, Breast Cancer, Child Vic, Wildlife
MD	8863-K adjusted due to unverified carryforward

Tax Payer Information

	Primary	Secondary
Date of Birth	8/13/1957	
Date of Death		
Signature PIN	81357	

Tax Return Information

Submission Id	00000000000000004207	**Schema Version**	KYIndividual2015v0.4
I.P. Address	10.100.4.217	**Approved Extension Filed**	☐
EFIN #	0	**Free File Indicator**	☐
Device Id	abcdef00000000000000000000000000004206	**Validating Number**	1000230

Important Dates

Original Submission ID	00000000000000007024	**Original Submission Date**	4/1/2016
IRS Received Date	10/26/2015 2:20:26 PM	**Format Changed Date**	12/4/2015
Electronic Postmark	10/26/2015 2:20:26 PM	**Completed Date**	12/4/2015
Acknowledgement Date		**Mainframe Upload Date**	
		Debit Upload Date	
		Est. Payment Upload Date	1/8/2016

Paid Preparer Information			
SSN		**Phone Number**	0
Preparer Name	JOHN ALPHABET	**PTIN**	P54897000
Business Name	ABC TAX INC	**Firm ID**	65487996
Business Address		**Self Employed**	☐
City, State and Zip		**Date Signed**	4/1/2016
Email		**Missing EIN Reason**	

Taxpayer Verification				
IRS Orig. Submission ID	0000000000000fed4207	**State Orig. Submission ID**	00000000000000007024	
IRS Orig. Submission Date	3/17/2016	**State Orig. Submission Date**	4/1/2016	
		State Current Submission ID	00000000000000004207	
Software License Type	P			
		Device ID Initial Creation	0000000000000000000000000 000000000000000	
Taxpayer Email	Smith@Frankfort.com	**Device ID Submission**	abcdef0000000000000000000 000000000004206	
Email Valid	3	**IP Address Creation**	100.10.40.07	
Cell Phone	5024004207	**IP Address Creation Date**	4/1/2016	
		IP Address Sub.	10.100.4.217	
		IP Address Sub.Date	4/1/2016	
		Time for Return Prep/Sub.	4207	
		State Issued PIN	0	
Bank Product Disbursement	1			
Ultimate Bank Acct Routing #	283978441		**Primary**	**Secondary**
Ultimate Bank Acct. #	3080799999	**Driver's Lic. / ID #**	EDrvrLcnsOrStateIssdIdNum4207	SpouseDLIdNum4217
		Driver's Lic. / ID State	KY	CA
		Driver's Lic. / ID Issue Dt	4/1/2015	4/15/2015
		Driver's Lic. / ID Expire Dt	4/30/2019	4/15/2017

The Return Summary is the first screen displayed when the SSN link is selected through Return Search. This screen provides miscellaneous information and a summary of taxpayers return.

Summary Section

The first section is the Summary section and is displayed on the top portion of every forms screen in the Return Display section of MeF. It lists the taxpayer's name & SSN, return status, vendor name, return type, tax year, phone number, spouse's name and SSN.

Error Codes Sent to Mainframe Field

Any error codes the Electronic Filing Coordination Section places on the return to pass to the mainframe will be displayed in this field. Up to three codes are allowed.

Tax Payer Information Fields

The Tax Payer Information section lists the date of birth, date of death and signature PIN numbers for the primary and secondary taxpayers.

Tax Return Information Fields

The tax preparer should indicate in this field if an approved federal and/or state extension was filed in the "Approved Extension Filed" indicator field. The Approved Extension Filed indicator field will be used to determine whether late filing penalty will be billed for returns received after the tax deadline.

Submission Id Field: - This is the number assigned by tax preparation software to the submission of the return. It is used in the transmission of the return and is beneficial to System Support staff and Taxpayer Assistance when communicating with the taxpayer in locating their returns.

The IP address, device id and EFIN are used mainly by System Support and Special Investigations staff in identifying potential fraudulent returns.

The Free File Indicator is used to identify those returns filed through the Free File Alliance participants and is used for statistical purposes by System Support staff.

Validating Number is the validation number assigned to the return.

Important Dates Fields

This section lists the important dates associated with the return. All the fields will be populated automatically by processes in MeF and are not editable by a user.

IRS Received Date field – This is the date the IRS received the return. The field is required. It can be used to determine when the return was filed.

Electronic Postmark field – This is the date return is transmitted from the place of origin to the IRS. This field is not required.

Acknowledgement Date field – This is the date the determination acknowledgement is sent back to the IRS.

Format Changed Date field – This is the date the name and address are reviewed/reformatted so that it can be sent to the Mainframe. The format review process is both automated and manual.

Completed Date field – This is the date the acceptance review is completed.

Mainframe Upload Date field – This is the date the accepted return information is passed to the mainframe.

Debit Upload Date field – This is the date the direct debit information is passed to EEPS. This field is only used if a direct debit is requested and it passes the direct debit business rule edits. The direct debit information is found on the Financial Transaction screen (see below). If the direct debit will not be processed DEBIT REJECTED is listed in the field.

Est. Payment Upload Date- Date the scheduled estimated payment(s) is uploaded to EEPS. Debit Rejected will be entered if for some reason the estimate payment request is not sent to EEPS.

Paid Preparer Information Fields

This section lists all pertinent information related to paid preparer such as SSN, phone number, preparer's name, PTIN, Business name and address, Firm ID, email address, date preparer signed and missing EIN reason, Email and a checkbox if preparer is self employed.

ELF/PAPER Metadata

This section is only available for paper filed returns and consists of the following fields:

Batch # - Batch number from SourceHOV

Trans Code – Transaction Code of "X" is received from SourceHOV for paper returns. MeF will assign a transaction code when it is uploaded to the mainframe.

Kick Out Code – Code of "X" for returns flagged by SourceHOV to drop for review

Received Date – Date return was received by SourceHOV

Taxpayer Verification Fields

These fields are part of the authentication header initially added in TY2015 for fraud prevention purposes. These are all optional fields captured and provided by the software vendors during the return creation process.

IRS Orig. Submission ID – Original Federal submission ID

IRS Orig. Submission Date – Date of the original Federal submission

State Orig. Submission ID – Original KY submission ID

State Orig. Submission Date – Date of the original KY submission

State Current Submission ID – KY submission ID for this return.

Software License Type – I=Individual (DIY); P=Professional; O=Individual Online Filer

Taxpayer Email – Taxpayer email address

Email Valid- 0=Can't send; 1=Bounced email; 2=Delivered email one-way; 3=Successful out-of-band (text or email)

Cell Phone - Cellular phone number provided by taxpayer

Bank Product Disbursement – 0=Did not select Bank Product Option; 1=Selected Debit Card Option; 2=Selected Direct Deposit to the Bank; 3=Requested a Check

Ultimate Bank Acct Routing # and Ultimate Bank Acct. # - These fields are used in conjunction with information from the Financial Transaction screen to determine if any applicable tax refund will be transferred through an intermediary account prior to receipt by the taxpayer. These fields represent where the refund should ultimately end up.

In some situations, the paid tax preparer offers financial products to their clients. A portion of the refund is provided by the preparer to the taxpayer at the time of filing. In accordance with this option, the taxpayer instructs the federal/state agency to deposit the tax refund in the preparer's account. The preparer then distributes the refund after retaining fees and the portion that was loaned up front to the taxpayer. The tax preparer's information is what is listed on the federal/state agency direct deposit account fields. The taxpayer's account would be listed in the ultimate bank account fields.

Device ID Initial Creation – Device ID when this submission was created

Device ID Submission – Device ID for this submission

IP Address Creation – IP Address of the submission creation

IP Address Creation Date – Date of IP Address Creation

IP Address Sub. – IP Address for this submission

IP Address Sub. Date – Date of IP Address submission

Time for Return Prep/Sub – Measured in whole minutes; the total time between the initial account login or account creation and the return submission

State Issued PIN – Personal Identification Number issued by KY

Driver's License Information – Any driver's license information supplied by the taxpayer and collected by the software vendor/tax preparer. Elements include DL state, number, issue date, and expiration date.

Financial Transaction Screen

Financial Transaction					
Tax Year	Trans Type	Requested Payment Date	Payment Amount	Transaction Rejected	IAT Transac
2014	DIRECT DEPOSIT		0	No	No

Financial Transaction					
Tax Year	Trans Type	Requested Payment Date	Payment Amount	Transaction Rejected	IAT Transac
2014	STATE PAYMENT	04/15/2015	552	No	No
2015	ESTIMATED PAYMENTS	04/15/2015	1000	No	No

This screen provides financial transactions information regarding direct deposits and direct debits. It scrolls right and left. Taxpayer's have the option to request direct debit of tax due on the Form 740 and Form 740-NP at the time of filing the return. They can request a direct debit of estimate tax on the Form 740 or Form 740-NP and direct deposits on the Form 740. E-filing of the Form 40A102 also allows the taxpayer to make payment of tax due. The taxpayer can request direct debit of tax due or estimate tax at a time other than when filing the return by completing the Form EPAY.

Transaction Type Field – This field lists the type of transaction requested. Direct Deposit, State Payment (Direct Debit of tax due) or Estimated Payments are valid.

Requested Payment Date – This field list the requested payment date for State Payments (Direct Debits). In the 740 NP Series only, the message 'Direct Deposit Rejected', will display for Direct Deposits as they are not allowed for nonresident electronic returns. The date the state payment is uploaded to EEPS will be entered on the Return Summary Screen in the field, Debit Upload Date.

The valid dates for Estimated Payments for processing year 2016 are April 18, 2016, June 15, 2016, September 15, 2016, and January 17, 2017. The date the estimate payment is uploaded to EEPS will be entered on the Return Summary Screen in the new field, Est. Payment Upload Date.

Payment Amount Field – This field is the amount of the requested payment for the direct debit. It must be a whole dollar amount.

Is IAT Transaction Field – This field indicates whether or not this transaction is through an international account. The values are Yes/No. If the value is yes, the direct deposit or direct debit request will not be processed. The Transaction Rejected will be set to yes in this situation.

Return 1040 Data & Federal Data screens

There are 3 IRS forms that are displayed in form view. The page 1 of the Form 1040 was already displayed in form view but additional page 2 fields have been added. Schedule C and Schedule C-EZ were added for tax year 2015.

The Federal Data option is still available with all the federal information received with the state return being displayed in a tree-view format.

Taxpayer	FILERFIRST Z FILERLAST VIII	**Primary SSN**	400-00-4251	**Status**	Rejected
Vendor	DORTEST	**Return Type**	O	**Tax Year**	2015
Spouse	SECFIRST B SECLAST SR	**Spouse SSN**	400-00-4261	**Phone**	(000) 002-0026

Form 1040

Taxpayer Information

Taxpayer	FILERLAST, FILERFIRST Z VIII	**Taxpayer SSN**	400004251
Spouse	SECLAST, SECFIRST B SR	**Secondary SSN**	400004261

Address FILER ADDR LINE 1

Address Line 2 FILER ADDR LINE 2

City FILER CITY **State** AR **Zip Code** 20025

Country

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want $3 to go to this fund. ☐ **You** ☐ **Spouse**

Filing Status

1	☐	Single
2	☐	Married filing jointly
3	☑	Married filing separately. Enter spouse's SSN above and full name here:
4	☐	Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter this child's name here:
5	☐	Qualifying widow(er) with dependent child

Exemptions

6a ☐ **Yourself**

6b ☐ **Spouse**

Boxes checked on 6a and 6b

6c

Dependents: **(1)** First name / Last name	**(2)** SSN	**(3)** Relationship	**(4)** Child Tax Credit Qualifier
SAM / JONES	400004291	GRANDCHILD	☑
SANDRA / JONES	400004292	DAUGHTER	☑
STEPHEN / JONES	400004293	GRANDCHILD	☑
MARY / JONES	400004294	SISTER	☐

No. of children on 6c who:
*** lived with you**
*** did not live with you due to divorce or separation**
Dependents on 6c not entered above

☐ More than four dependents?

6d Total number of exemptions claimed **Add numbers on lines above** 6

Income

7	Wages, salaries, tips, etc.				7	10,000
8a	**Taxable** interest				8a	10,001
8b	**Tax-exempt** interest	8b	10,002			
9a	Ordinary dividends.				9a	10,003
9b	Qualified dividends	9b	10,004			
10	Taxable refunds, credits, or offsets of state and local income taxes				10	10,005
11	Alimony received				11	10,006
12	Business income or (loss)				12	10,007
13	Capital gain or (loss). Schedule D not required ☐				13	10,008
14	Other gains or (losses)				14	10,009
15a	IRA distributions	15a	10,010	**15b** Taxable amount	15b	10,011
16a	Pensions and annuities	16a	10,012	**16b** Taxable amount	16b	10,013
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc.				17	10,014
18	Farm income or (loss)				18	10,015
19	Unemployment compensation				19	10,016
20a	Social security benefits	20a	10,017	**20b** Taxable amount	20b	10,018
21	Other income. List type and amount				21	10,019
22	Add the amounts in the far right column for lines 7 through 21. This is your **total income**				22	10,020

Adjusted Gross Income

23	Educator expenses	23	10,021		
24	Certain business expenses of reservists, performing artists, and fee-basis government officials	24	10,022		
25	Health savings account deduction	25	10,023		
26	Moving expenses	26	10,024		
27	Deductible part of self-employment tax	27	10,025		
28	Self-employed SEP, SIMPLE, and qualified plans	28	10,026		
29	Self-employed health insurance deduction	29	10,027		
30	Penalty on early withdrawal of savings	30	10,028		
31a	Alimony paid **b** Recipient's SSN	31a	10,031		
32	IRA deduction	32	10,032		
33	Student loan interest deduction	33	2,433		
34	Tuition and fees deduction	34	10,034		
35	Domestic production activities deduction	35	10,035		
36	Add lines 23 through 31a and 32 through 35			36	10,037
37	Subtract line 36 from line 22. This is your **adjusted gross income**			37	10,038

Tax and Credits

49	Credit for child and dependent care expenses. Attach Form 2441	49	10,049
50	Education credits from Form 8863, line 19	50	10,050

Other Taxes

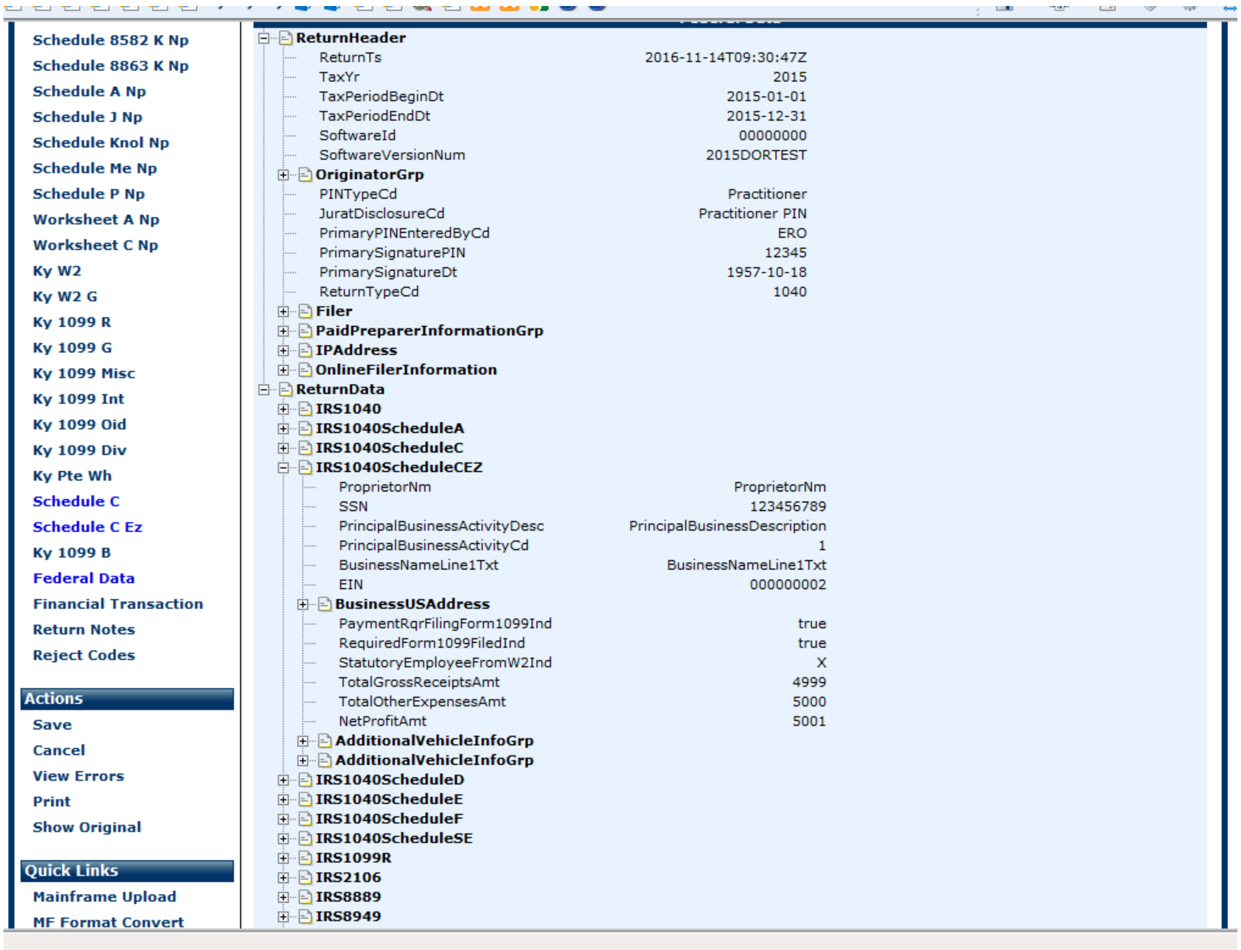
57	Self-employment tax. Attach Schedule SE	57	10,057

Payments

66a	Earned income credit (EIC)	66a	10,067
68	American opportunity credit from Form 8863, line 8	68	10,070

of Rights

imer | Accessibility Statement


Schedule 8582 K Np
Schedule 8863 K Np
Schedule A Np
Schedule J Np
Schedule Knol Np
Schedule Me Np
Schedule P Np
Worksheet A Np
Worksheet C Np
Ky W2
Ky W2 G
Ky 1099 R
Ky 1099 G
Ky 1099 Misc
Ky 1099 Int
Ky 1099 Oid
Ky 1099 Div
Ky Pte Wh
Schedule C
Schedule C Ez
Ky 1099 B
Federal Data
Financial Transaction
Return Notes
Reject Codes
Actions
Save
Cancel
View Errors
Print
Show Original
Quick Links
Mainframe Upload
MF Format Convert
ReturnHeader
ReturnTs 2016-11-14T09:30:47Z
TaxYr 2015
TaxPeriodBeginDt 2015-01-01
TaxPeriodEndDt 2015-12-31
SoftwareId 00000000
SoftwareVersionNum 2015DORTEST
OriginatorGrp
PINTypeCd Practitioner
JuratDisclosureCd Practitioner PIN
PrimaryPINEnteredByCd ERO
PrimarySignaturePIN 12345
PrimarySignatureDt 1957-10-18
ReturnTypeCd 1040
Filer
PaidPreparerInformationGrp
IPAddress
OnlineFilerInformation
ReturnData
IRS1040
IRS1040ScheduleA
IRS1040ScheduleC
IRS1040ScheduleCEZ
ProprietorNm ProprietorNm
SSN 123456789
PrincipalBusinessActivityDesc PrincipalBusinessDescription
PrincipalBusinessActivityCd 1
BusinessNameLine1Txt BusinessNameLine1Txt
EIN 000000002
BusinessUSAddress
PaymentRqrFilingForm1099Ind true
RequiredForm1099FiledInd true
StatutoryEmployeeFromW2Ind X
TotalGrossReceiptsAmt 4999
TotalOtherExpensesAmt 5000
NetProfitAmt 5001
AdditionalVehicleInfoGrp
AdditionalVehicleInfoGrp
IRS1040ScheduleD
IRS1040ScheduleE
IRS1040ScheduleF
IRS1040ScheduleSE
IRS1099R
IRS2106
IRS8889
IRS8949

Reject Codes Screen

The Reject Codes screen will be available if the return was rejected. This screen lists the reasons the reviewer provided to the tax preparer for rejecting the return. All paper returns will be accepted in MeF; only electronically filed returns will be rejected.

Reject Codes		
RejectCode	FormName	RejectCodeDescription
F740-0021	FORM740	The state ID number on the W-2, W-2G, 1099-R, 1099-G, 1099-INT, 1099-OID, 1099-DIV and 1099-MISC cannot be greater in length than 6 digits and cannot be blank If KY is the state for which the income tax is withheld.

Return Notes

The Return Notes screen provides ability for the user to add notes. All security levels can add notes.

To add a note:

1. Click return Notes under Forms
2. Type a note in the text box
3. Click Add Notes button

The note appears in the Return Notes section with the date it was added and the user name of who added the note.

2.3 Action Menu for Return Display

Actions

Return To Search
View Errors
Print
Show Original

The Actions menu has Return to Search, View Errors Print and Show Original links.

Return to Search

This action returns the user to the Return Search screen.

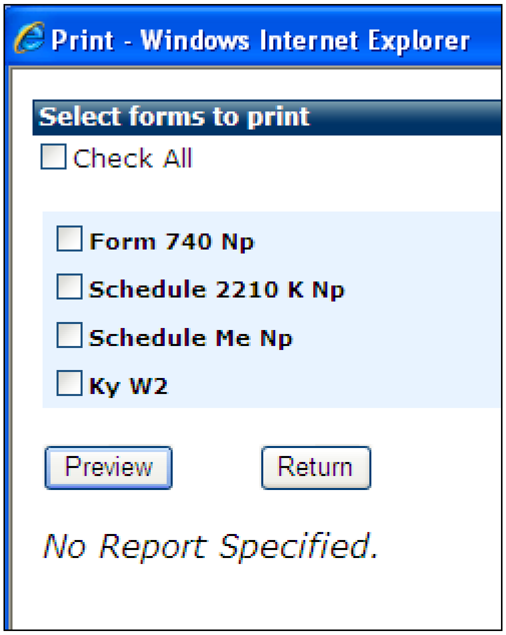
View Errors

A pop up window displays any rule name, error description, error severity and reject code associated with that particular tax return. The return errors are worked in another function of MeF by the Electronic Filing Coordination Section.

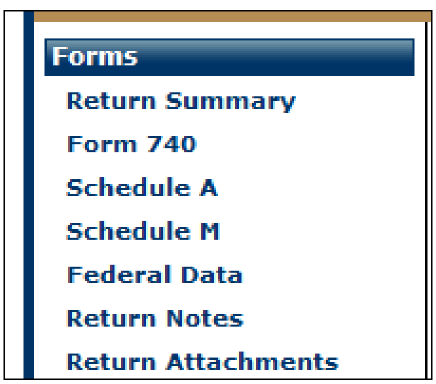
Return Errors

Form Desc	Error Desc	Error Severity	Reject Code
F740_0001_C50	Schedule 2210K is required and was not found. Additional Tax Due exceeds $500.00.	C	
WA_F740_0001_C2	Error on Worksheet A, Line 5.	C	

Print



When print is selected from Actions, a print screen is displayed with all the available forms for a particular tax return. The print screen allows the user to select the documents for print by clicking in the box next to the documents to be printed. There is also a Check All selection at the top of the page.



Note: A copy of the scanned return has been provided as a PDF document with the paper return and can be found by selecting the Return Attachments link and downloading the document. It is recommended that you print the PDF instead of using the print function for paper returns.

Print Instructions:

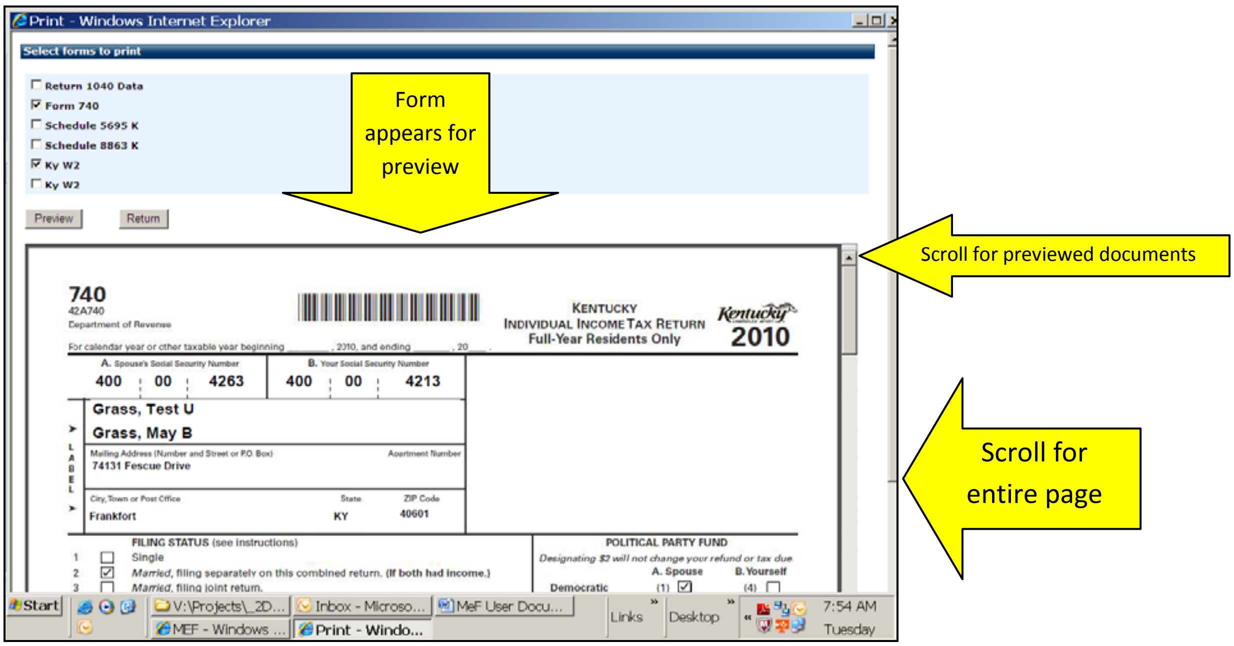
1. Check the forms to be printed and click the Preview button.

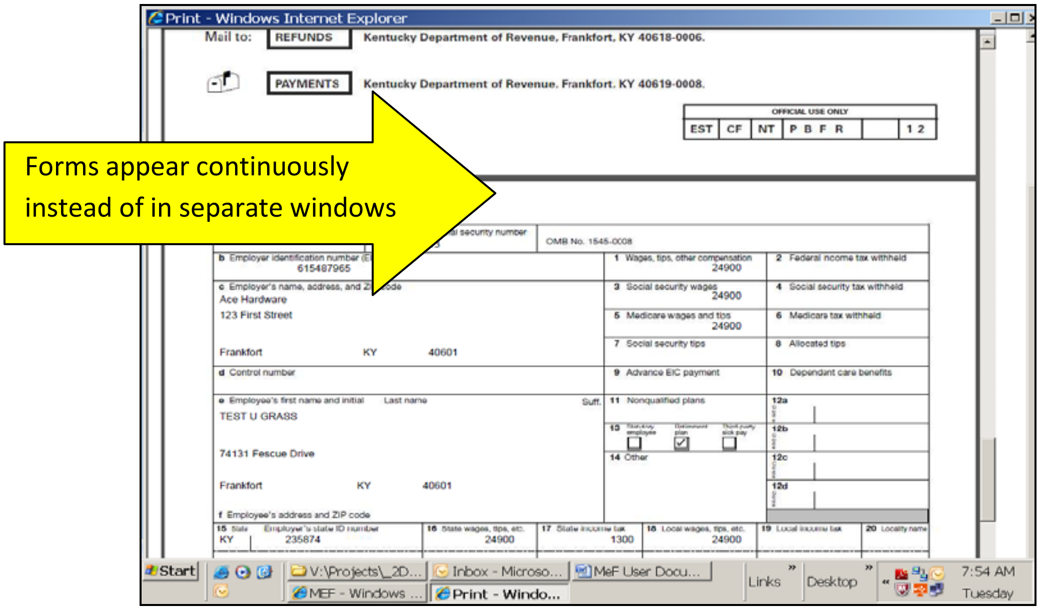
2. The forms selected will be displayed at the bottom of the current page.

3. Preview forms. Scrolling can be a little tricky. You have a scroll for the entire page and a scroll for the previewed forms.

4. Click the Print button that shows up at the bottom of the previewed document or right-click on the document and select "print" from the drop-down menu.

5. The document(s) will print using the specifications in your print preferences.




Print - Windows Internet Explorer
Mail to: REFUNDS Kentucky Department of Revenue, Frankfort, KY 40618-0006.
PAYMENTS Kentucky Department of Revenue. Frankfort. KY 40619-0008.
Forms appear continuously
instead of in separate windows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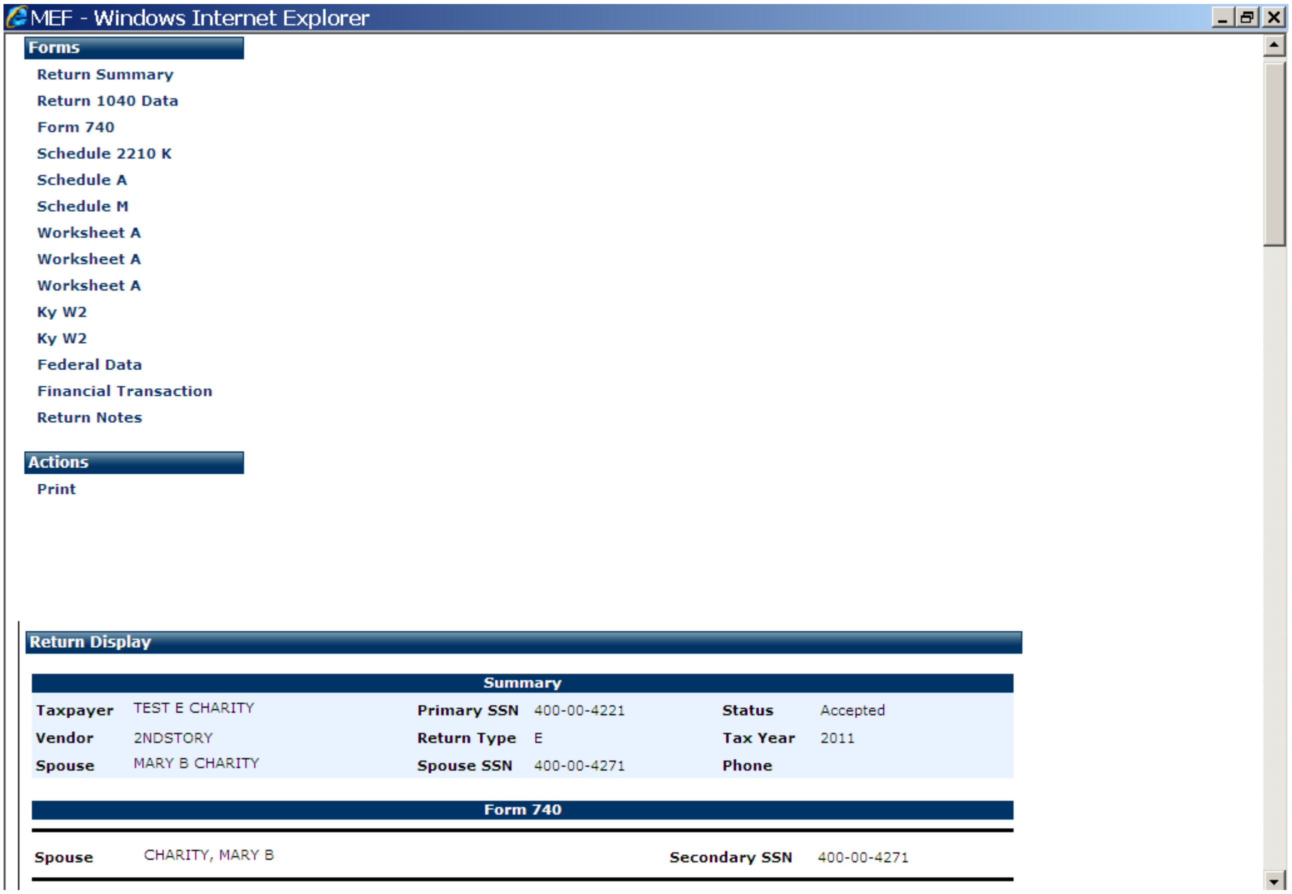
Show Original



The return can be adjusted by the Electronic Filing Coordination Section in the Return Errors Function of MeF. Show Original displays the return as it was originally received. When you print the original return "ORIGINAL" is listed at the top of the printed form. You must do a comparison to see what was changed, it isn't marked. The View Errors, Error Codes on the Summary screen and return notes will also help you determine what was changed.

For paper filed returns, the Return Attachment will have the scanned return in a PDF format.

Appendix A – Contact Information

ELF/MeF System Help Desk – 502-782-7000
Please contact us for all system functionality issues other than password issues.

Audrey Terry, AudreyJ.Terry@ky.gov
R. J. Hill, RichardJ.Hill@ky.gov