

# **Department of Revenue**

## ***Modernized e-File (MeF)***

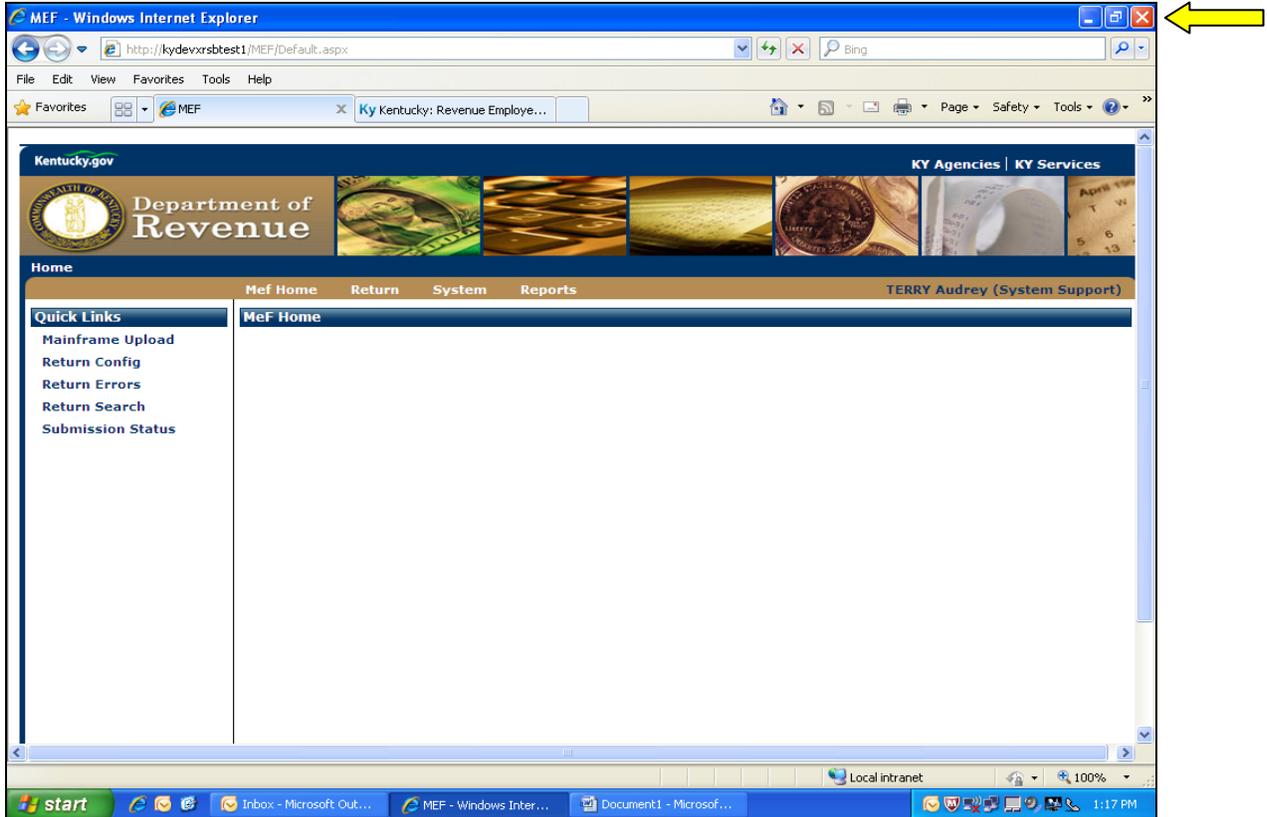
### **User Documentation**

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# 1. MeF Home

There will be a link to MeF on KREW. MeF Home is the main page you will receive when logging into MeF. As with any other web-based application click the X at the top of the page to logoff.



## **Department of Revenue Banner & Home Link**

Clicking on the Department of Revenue (DOR) seal in the banner area is a shortcut to the DOR Individual Income Tax website. Clicking on “Home” will take you to the DOR home page.

## **Kentucky.Gov Links**



Selecting Kentucky.gov, Kentucky Agencies or Kentucky Services will take you to the Kentucky.gov website. Selecting Kentucky.gov takes you to the Kentucky.gov home page. Selecting Kentucky Agencies will take you to the “Commonwealth of Kentucky Organizational Structure” page that provides links to state agencies. Kentucky Services will take you to the “Online Services” page that provides links to state services.

## Menu



The menu lists the different functions within the MeF system. There are four main menu options: MeF Home, Return, System, and Reports. Staff Level One will have access to MeF Home and Return only. The majority of users will have this level of access. MeF Home, Return, System and Reports will be available to Coordinators with limited access in System functions. MeF Home, Return, and Reports will be available to Supervisors and Managers with limited access to Ad Hoc Reports. System Support staff will have access to all menu items.

## **2. Return**

### **2.1 Return Search**



The return search allows you to search by name or SSN for completed returns. You must enter the name or SSN, select the Tax Year and # of Returned Records and select the search button for each search.

### **Search Type**

From the search type drop-down list, you can search by either name or SSN. By default SSN is selected and a box is displayed to enter the SSN. If you select Name, additional boxes will appear for you to enter the taxpayer or spouse's last name and/or first name.

### **Tax Year**

From the drop-down list of available tax years, you can select your desired tax year. The current tax year is the default.

**Returned Records**

From this returned records drop-down list, you can select the maximum number of search results to display. The values include 5, 10, 15, 20, 25, 50 and 100. The default value is 5.

**Search Button**

Select the search button to generate the search.

**Clear Button**

Select the clear button to clear the search options you typed in and any results displayed.

**Search by SSN**

The screenshot shows a web form titled "Return Search" with a dark blue header. Below the header, there are three dropdown menus: "Search Type:" set to "SSN", "Tax Year:" set to "2010", and "Returned Records:" set to "5". To the right of these is a text input field labeled "Taxpayer SSN:". At the bottom of the form are two buttons: "Search" and "Clear".

**Taxpayer SSN**

The screenshot shows a web form titled "Return Search" with a dark blue header. Below the header, there is a dropdown menu for "Search Type:" set to "SSN" and a text input field for "Taxpayer SSN:". The "Returned Records" dropdown is not visible in this view.

Type in the SSN of the primary OR secondary taxpayer. Dashes are allowed, but not required.

**Search by Name**

You can search by first and last name or first or last name of either the taxpayer or spouse.

The screenshot shows a web form titled "Return Search" with a dark blue header. Above the form is a navigation bar with links: "Mef Home", "Return", "System", "Reports", and a user name "TERRY Audrey (System Support)". The form has a dropdown for "Search Type:" set to "Name", and text input fields for "Taxpayer First:", "Spouse First:", "Taxpayer Last:", and "Spouse Last:". It also has dropdowns for "Tax Year:" (set to "2010") and "Returned Records:" (set to "5"). At the bottom are "Search" and "Clear" buttons.

### **Taxpayer First/Spouse First**

Type in the person's first name. There is a 35 character maximum limit. Type in less letters of the name to broaden the search. Type in more letters in the name to narrow the search.

### **Taxpayer Last/Spouse Last**

Type in the person's last name. There is a 35 character maximum limit. Type in less letters of the name to broaden the search. Type in more letters in the name to narrow the search.

The screenshot shows a web interface for searching tax returns. On the left is a navigation menu with options like 'Return Search', 'Return Errors', and 'Submission Errors'. The main area is titled 'Return Search' and contains search filters: 'Search Type' (Name), 'Tax Year' (2010), and 'Returned Records' (5). Input fields for 'Taxpayer First', 'Spouse First', 'Taxpayer Last', and 'Spouse Last' are present, with 'test' entered in the Taxpayer First field. 'Search' and 'Clear' buttons are at the bottom of the search area. Below the search area, a table displays '3 Item(s) Found'. A yellow arrow labeled 'Results' points to the table.

Taxpayer SSN	Spouse SSN	Taxpayer Name	Return Type	Status Code
<a href="#">400-00-4215</a>	400-00-4265	Test J Caesar & Cleo P Caesar	Form740	A
<a href="#">400-00-4220</a>	400-00-4270	Test R De La Hoya & Ruby D	Form740	A
<a href="#">400-00-4230</a>	400-00-4280	TEST E RATT & WHARF B RATT	Form740	A

### **Search Results**

The search results are displayed below the search options. If no match is found, a message, “0 Item(s) Found”, will be displayed in the search results section. For matches, the Taxpayer SSN, Spouse SSN, Taxpayer Name, Return Type and Status Code are displayed. Click on the underlined taxpayer's SSN for the return you wish to view. There may be multiple pages of results identified by page numbers at the bottom of the results. Select the page you wish to view. Each page will display up to 15 results.

### **Return Type**

The return type will be Form 740. The Form 740-NP is scheduled to be developed for tax year 2012.

### **Status Code**

The acknowledgement code is displayed in this field. The codes are as follows: A=Acknowledged, C=Conditional, and R=Rejected. These are the same as in ELF.

### **2.2. Return Display**

Similar to ELF, the links for forms and other information available for the specific return can be found in the left hand column under “Forms”. Select the link you wish to view.

**Forms Menu / Actions Menu**

Department of Revenue

MeF Home Return System Reports TERRY Audrey (System Support)

**Forms**

- Return Summary
- Return 1040 Data
- Form 740
- Schedule 5695 K
- Schedule 8863 K
- Ky W2
- Ky W2
- Federal Data
- Financial Transaction
- Return Notes

**Actions**

- Save
- Cancel
- View Errors
- Print

**Return Display**

**Summary**

<b>Taxpayer</b>	Test Grass	<b>Primary SSN</b>	400004213	<b>Status</b>	Accepted
<b>Vendor</b>	2NDSTORY	<b>Return Type</b>	E/SO	<b>Tax Year</b>	2010
<b>Spouse</b>	May Grass	<b>Spouse SSN</b>	400004263	<b>Phone</b>	920 / 801

**Tax Payer Information**

	Primary	Secondary
<b>Date of Birth</b>	3/1/1984	8/12/1983
<b>Date of Death</b>	1/1/0001	1/1/0001
<b>Signature PIN</b>	12345	12345

**Tax Return Information**

<b>Submission Id</b>	42264220111683733882	<b>Schema Version</b>	KYIndividual2010v1.7
<b>T.P. Address</b>	10 20 21 199	<b>Approved Extension Filed</b>	<input type="checkbox"/>

### 2.3. Return Summary

The screen print above is the top section of the Return Summary screen. This will always be the first screen displayed is the Return Summary. It is similar to the ELF Miscellaneous screen.

#### Summary

Summary					
<b>Taxpayer</b>	Test U Grass	<b>Primary SSN</b>	400004213	<b>Status</b>	Accepted
<b>Vendor</b>	2NDSTORY	<b>Return Type</b>	E/SO	<b>Tax Year</b>	2010
<b>Spouse</b>	May B Grass	<b>Spouse SSN</b>	400004263	<b>Phone</b>	941 / 822

The first section is the Summary portion. This section will be found at the top of all forms/screens in the Return Display section of MeF. It lists the taxpayer's name & SSN, return status, vendor name, return type, tax year, spouse's name & SSN (if applicable), and phone number.

#### Tax Payer Information

Tax Payer Information			
	Primary	Secondary	
<b>Date of Birth</b>	3/1/1984	8/12/1983	
<b>Date of Death</b>			
<b>Signature PIN</b>	12345	12345	

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

**Tax Return Information**

Tax Return Information			
<b>Submission Id</b>	42264220111683733882	<b>Schema Version</b>	KYIndividual2010v1.7
<b>I.P. Address</b>	10.20.21.199	<b>Approved Extension Filed</b>	<input type="checkbox"/>
<b>EFIN #</b>	422642	<b>Free File Indicator</b>	<input type="checkbox"/>

This section provides summary information that will be useful to the system support analyst but other users may use the Approved Extension Filed indicator field for returns received after the tax deadline.

**Important Dates**

Important Dates			
<b>IRS Received Date</b>	6/17/2011 10:05:14 AM	<b>Format Changed Date</b>	7/6/2011
<b>Electronic Postmark</b>	6/17/2011 8:10:07 AM	<b>Completed Date</b>	7/6/2011
<b>Acknowledgement Date</b>		<b>Mainframe Upload Date</b>	
		<b>Debit Upload Date</b>	

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.

**IRS Received Date** – the date the IRS received the electronic return (required field)

**Electronic Postmark** – the date the return was transmitted from the place of origin (optional field)

**Acknowledgement Date** – the date the acknowledgement was sent back to the IRS (required)

**Format Change Date** – the date the name or address was reformatted to send to the Mainframe (only populated if name and/or address are reformatted)

**Completed Date** – the date the return was finalized (required)

**Mainframe Upload Date** – the date the return was added to the mainframe upload file (only populated if return is sent to mainframe)

**Debit Upload Date** – the date the direct debit information was added to the direct debit file (only populated if direct debit information is present and doesn't fail criteria for direct debit) Note: Debit information is found on the Financial Transaction screen in MeF.

## Paid Preparer Information

Paid Preparer Information			
SSN		Phone Number	3215465454
Preparer Name	IMA PREPARER	PTIN	P76598432
Business Name	Johnsons Tax Service	Firm ID	614587666
Business Address	123 main	Self Employed	<input type="checkbox"/>
City, State and Zip	lexington, KY 40507	Date Signed	
Email		Missing EIN Reason	

This section list all pertinent information needed to identify the paid preparer such as SSN, phone number, preparer's name and PTIN, whether the preparer is self employed, Business name and address, Firm ID, email address, date preparer signed and missing EIN reason.

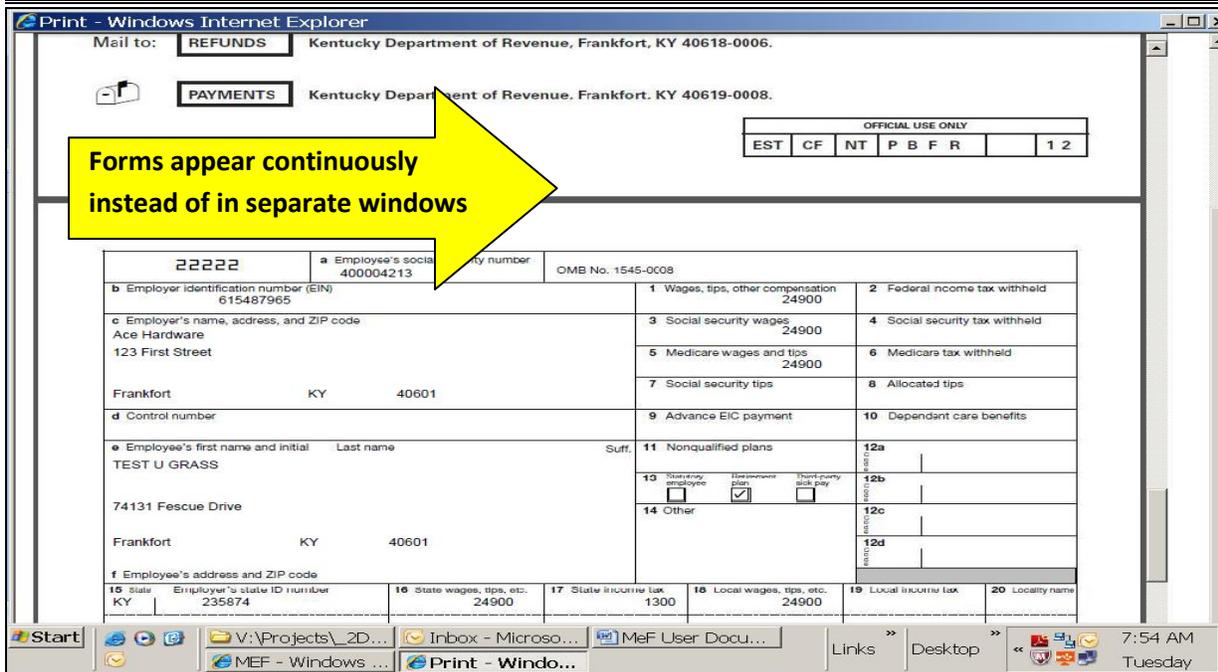
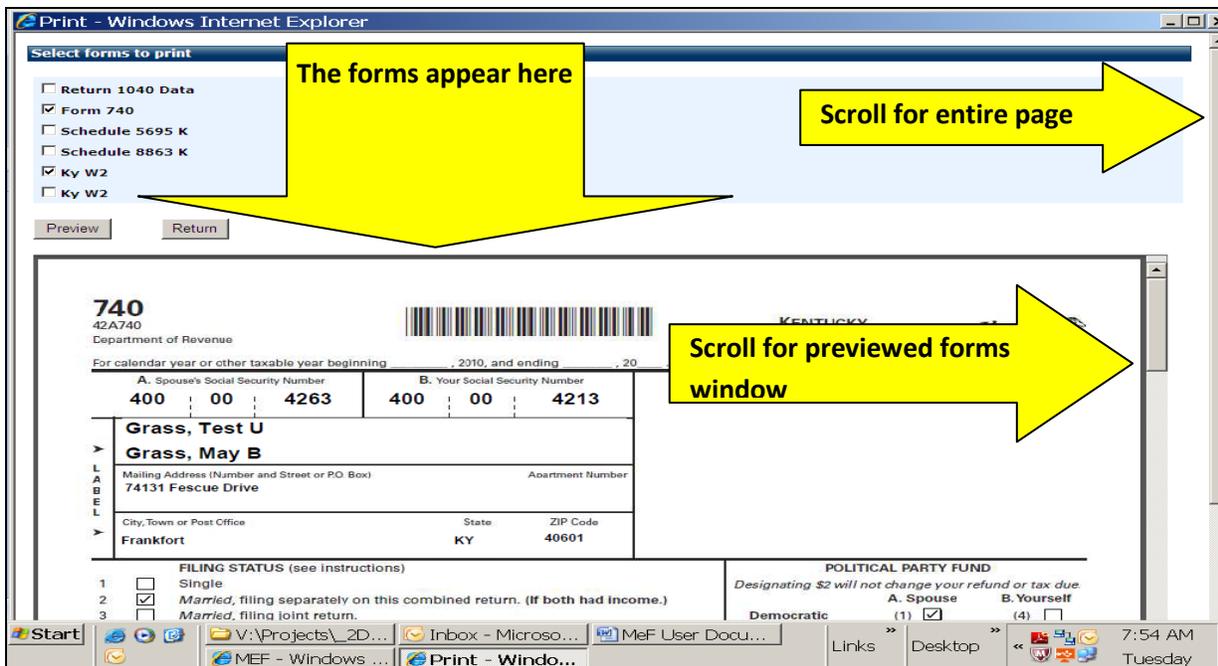
## 2.4 Actions

Actions
<a href="#">Return To Search</a>
<a href="#">Print</a>

The Actions menu has 2 options: Return to Search and Print. Return to Search returns you to the Return Search screen.

## 2.5 Print

The print screen allows you to select the documents you want to print by placing a check mark beside the document. Select the Preview button and the documents are displayed continuously so you need to scroll to see all the documents selected. The return button takes you back to the previous screen you were on when you selected print.



To print, select the printer key from the pop-up (shown below) that shows up at the bottom of the previewed document or right-click on your mouse and select "print" from the drop-down menu. The print dialog box appears and you can set the print preferences such as the number of copies then select ok.



## 2.6 Financial Transaction

A new screen was created to store the financial transactions information regarding direct deposits and direct debits. In ELF this was part of the miscellaneous screen. The transaction type identifies whether a direct deposit or direct debit was requested.

Financial Transaction	
Tax Year	2010
Transaction Type	DIRECT DEPOSIT
Checking Account	No
Savings Account	Yes
Routing Transit Number	283978441
Bank Account Number	3081155555
Payment Amount	1236
Identification Number	
Account Holder Name	
Account Holder Type	
Requested Payment Date	1/1/0001 12:00:00 AM
Phone Number	5025551009
Is IAT Transaction	No
Record Added By	ReturnProcessor
Record Added Date	6/20/2011 10:17:16 AM

## 2.7 Return 1040 Data/Federal Data

The entire first page of the Form 1040 is displayed in a form format under the Return 1040 Data link. The Federal Data link has the entire federal information in a tree-view format.

Return Display					
Summary					
Taxpayer	Test Grass	Primary SSN	400004213	Status	Accepted
Vendor	2NDSTORY	Return Type	E/SO	Tax Year	2010
Spouse	May Grass	Spouse SSN	400004263	Phone	920 / 801
Form 1040					
Label					
Taxpayer	Grass, Test U	Taxpayer SSN	400004213		
Spouse	Grass, May B	Secondary SSN	400004263		
Address	74131 Fescue Drive				
Address Line 2					
City	Frankfort	State	KY	Zip Code	40601
Country					
Presidential Election Campaign	Check here if you, or your spouse if filing jointly, want \$3 to go to this fund.			<input type="checkbox"/> You	<input type="checkbox"/> Spouse
Filing Status					
1	<input type="checkbox"/>	Single			
2	<input checked="" type="checkbox"/>	Married filing jointly			
3	<input type="checkbox"/>	Married filing separately. Enter spouse's SSN above and full name here:			
4	<input type="checkbox"/>	Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter this child's name here:			
5	<input type="checkbox"/>	Qualifying widow(er) with dependent child			
Exemptions					
6a	<input type="checkbox"/>	Yourself			Boxes checked on 6a and 6b
6b	<input type="checkbox"/>	Spouse			

Return Display					
Summary					
<b>Taxpayer</b>	Test Grass	<b>Primary SSN</b>	400004213	<b>Status</b>	Accepted
<b>Vendor</b>	2NDSTORY	<b>Return Type</b>	E/SO	<b>Tax Year</b>	2010
<b>Spouse</b>	May Grass	<b>Spouse SSN</b>	400004263	<b>Phone</b>	920 / 801
Federal Data					
<ul style="list-style-type: none"> <li>ReturnHeader</li> <li>ReturnData <ul style="list-style-type: none"> <li>IRS1040</li> <li>IRS2441</li> <li>IRS8812</li> <li>IRSW2 <ul style="list-style-type: none"> <li>EmployeeSSN 400004213</li> <li>EmployerEIN 615487965</li> <li>EmployerNameControl ACEH</li> <li>EmployerName</li> <li>EmployerUSAddress</li> <li>EmployeeName TEST U GRASS</li> </ul> </li> </ul> </li> </ul>					

## 2.8 Forms and Schedules

Any of the following forms attached to the return will be displayed in MeF: 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-R, 1099-Misc, and 1099-INT. The forms are a continuous screen and not a separate link for each page. All the fields are protected and not editable.

Forms	Return Display																																																																														
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## 2.9 Return Notes

All security levels can add notes to the return. Type the note in the text field and select the Add Notes button to add the note to MeF. The note appears in the Return Notes section with the date it was added and the user identification of who added it.

Return Notes		
Record Added Date	User Name	Notes
7/15/2011	REVX003	Adding a Note

## 2.10 Return Attachments

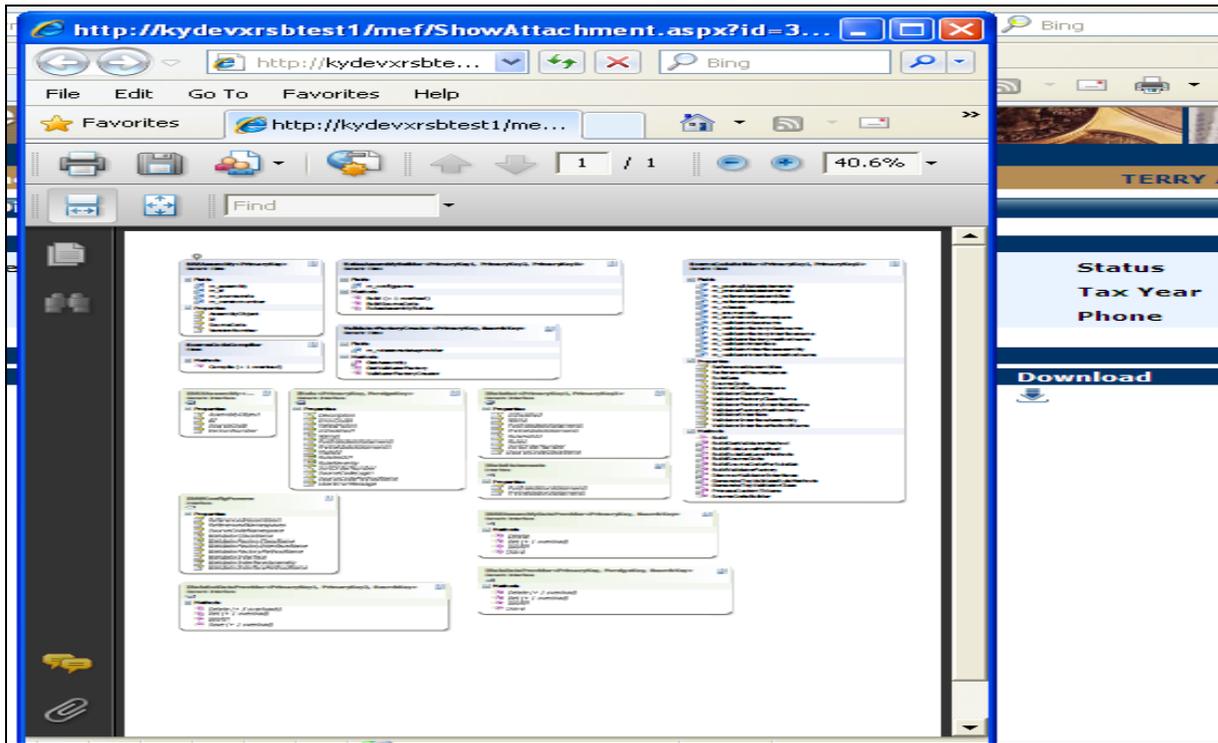
Return Attachment will appear in the Forms Menu if there are forms to be downloaded. Select Return Attachments from the Forms menu.

Summary					
Taxpayer	TEST E CHARITY	Primary SSN	400004221	Status	Accepted
Vendor	RCS	Return Type	E	Tax Year	2010
Spouse	MARY B CHARITY	Spouse SSN	400004271	Phone	1170 / 1034

Select the Download you wish to view.

Name	Type	Download
class	pdf	

The download will open as a PDF document. You have the option to view and print.

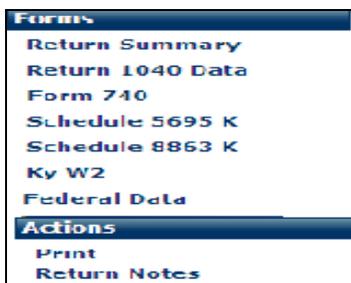


### **2.11 Show Original**

If a return is changed, finalized and saved in Return Errors, you will have the option to see the original return in the Return Display function. The Show Original function is found under the Actions Menu.



Select the form name from the Forms Menu that you wish to view and it will be displayed. You can enter Return Notes while in the Show Original function by selecting Return Notes in the Actions Menu. The Print option allows you to print any of the forms listed.



The form will have the word "ORIGINAL" listed at the top of each page.

740  
42A740  
Department of Revenue

Original

KENTUCKY  
INDIVIDUAL INCOME TAX RETURN  
Full-Year Residents Only  
2010

For calendar year or other taxable year beginning \_\_\_\_\_, 2010, and ending \_\_\_\_\_, 20\_\_\_\_

A. Spouse's Social Security Number  
400 00 4263

B. Your Social Security Number  
400 00 4213

Grass, Test U  
Grass, May B

Mailing Address (Number and Street or R.U. Box) Apartment Number  
74131 Fescue Drive

City/Town or Post Office State ZIP Code

## Appendix A - Other Items

A new column titled F has been added to PF3 to identify the returns that are transmitted via MeF. An M for MeF will be placed in the column for the returns transmitted through MeF. The code in column D will remain an E or O for electronic or online.

```

REIIT20D                COMMONWEALTH OF KENTUCKY                PAGE 01
                        INDIVIDUAL INCOME TAX                    07/15/11
SOCIAL SECURITY NO: 400 00 4219   ADDRESS: 123 FRONT STREET
NAME: HOAGIE TEST A & TUNA S      5018029 PUNTA GORDA
SPOUSE SOC SEC NO: 400 00 4269   BELIZE

VAL NO   D S T MO/YR P M K/D F   ERR CD CHECK #   AMOUNT   PROC DTE
001000148 E 2 I   10 3   D M   ← 0.00   07/14/11
123 FRONT STREET   5018029 PUNTA GORDA   BELIZE
    
```

## Appendix B - Future Items

The Summary screen will be enhanced to display any error codes assigned while working the return on MeF. This will be discussed more in training.

Return Display					
Summary					
Taxpayer	Behavior Test	Primary SSN	400004207	Status	Accepted
Vendor	2NDSTORY	Return Type	E/SO	Tax Year	2010
Spouse		Spouse SSN		Phone	900 / 781
Error Codes Sent to Mainframe					
B - Mismatch in amount claimed as FAGI					
FA - Sch A-error in calc of total contributions					
Tax Payer Information					
		Primary	Secondary		
	Date of Birth	3/1/1984			
	Date of Death	1/1/0001			
	Signature PIN	12345			