

~IMF / BMF TY2012 Known Issues and Solutions~

Processing Year 2013

As of November 27, 2012

Form Type	Schema/Schema Element	Description of the Problem	Temporary Solution(s)	Status
Form 499R-2	Business rules F499R2W2PR-003 & 004	The rule states Line "c" the correct line number is "2".	Business rule 003 will validate per the element name, business rule 004 will be disabled for Tax Year 2012/Processing Year 2013.	Business rule F499R2W2PR-003 will be corrected in Tax Year 2013/Processing year 2014
Form 1040	Line 60, [OtherTaxStatement]	The Tax Year 2012 Form 1040 Instructions for Line 60 changed for the recapture of the credits claimed on Forms 8834 and 8936.	Continue to use enumeration "8834" to report the recapture of the qualified plug-in electric vehicle credit and enumeration "8936" to report the recapture of the qualified plug-in electric drive motor vehicle credit.	A request to update the enumerations included in the [OtherTaxStatement] schema will be submitted for Tax Year 2013 / Processing Year 2014. The enumeration "8834" will be updated to "8834R" and the enumeration "8936" will be updated to "8936R".
Form 1040	Line 60, [OtherTaxStatement]	The Tax Year 2012 Form 1040 Instructions for Line 60 added the enumeration "From Form 1040NR" to identify tax on noneffectively connected income for any part of the year you were a nonresident alien.	Use the 'OtherTaxTxt' in the [OtherTaxStatement] to identify "FROM FORM 1040NR".	A request to add the enumeration "FROM FORM 1040NR" to the [OtherTaxStatement] schema will be submitted for Tax Year 2013 / Processing Year 2014.
Form 1040	Line 70, 'TotalIncomeTaxCredit'	The Form 1040 schema, Line 70 'TotalIncomeTaxCredit' is not consistent with the Form 1040, Line 70, Credit For Federal Tax On Fuels.	No impact.	A request to update Line 70 of the Form 1040 schema and related Business Rules will be submitted for Tax Year 2013 / Processing Year 2014.
Form 1040	Domestic Production Act Statement	The Form 1040 schema package includes the outdated Domestic Production Act Statement. This statement was attached to the Form 1040 return if you were claiming both a deduction for domestic production activities and a deduction for tuition and fees. This statement showed the breakdown of the amount claimed for each deduction. These deductions are now separate lines on the Form 1040.	Please do not attach the Domestic Production Act Statement to the Form 1040 return.	A request to delete the Domestic Production Act Statement will be submitted for Tax Year 2013 / Processing Year 2014.
Form 1040-SS	IRS4562	IRS4562 is attached to several lines. Per the Form 1040-SS instructions, Form 4562 is attached "to the return".	Please continue to attach Form 4562 to the line.	This will be corrected for Tax Year 2013/Processing Year 2014.
Form 1065 ATS ONLY	IRS1065ScheduleD	Schedule D (F1065) schema has e-file types of USAmountNNTYPE on Schedule D Part I Lines 1d, 1e, 1g, 1h, 2d, 2e, 2h, 2g, 3d, 3e, 3h, 3g and Part II 8d, 8e, 8h, 8g, 9d, 9e, 9h, 9g, 10d, 10e, 10h, 10g, which do not allow for negative amounts. Therefore Scenario 4 for the Form 1065 will not be tested until schemas are corrected.	Do not test Scenario 4 for Form 1065.	Schemas will be corrected as soon as possible.
Form 1065 ATS ONLY	IRS1065ScheduleK1	New Line 12 was set to be required on the schemas. This line should be optional.	While testing check the box on Line 12, even if it does not apply.	Schemas have been corrected for version 2.0 which will be available for testing on 12/17/2012.
Form 1065 FOR TY2011 SCHEMAS ONLY	IRS1065	Schemas for TY2011 do not have the element name to allow filers to report any Qualifying Therapeutic Discovery Credits (QTDP).	If you need to report any Qualifying Therapeutic Discovery Credits (QTDP), please use the small general dependency. The description should be "Qualifying Therapeutic Discovery Credits"	Use the work around for Processing year 2013, 2014, 2015
Form 3800	Business Rules	Business Rules were created that limit the amount of Employer provided child care facilities and services (Form 8882), Form 3800, part III, line 1k. The dollar tolerance is not in sync with the instructions. The business rules as written will be triggered if the dollar amount is \$150,000 or more. Per the instructions they should only be triggered if the dollar amount is \$150,001 or more.	Enter \$149,999 instead of \$150,000 on Form 3800, part III, line 1k(c), CYEmplrProvChildCareFcltsCr and include the additional dollar in the total, Form 3800, part III, line 2, CurrentYearGeneralBusCr.	Business Rules will be corrected for TY 2013.
Form 5471, Sch J	BalanceAtBOYExplanationStmnt	The schema allows only one occurrence of the dependency BalanceAtBOYExplanationStmnt.	If multiple instances of the dependency are needed use the GeneralDependencMedium to provide the additional statements.	Corrections will be provided in a future release.
Form 5884-B	Parent Form Return Data Schema	The filing of more than one F5884-B with any return will reject due to the MaxOccurs of one.	Since a maximum of one Form 5884-B can be attached to the return, if the taxpayer is claiming an amount for the New Hire Retention Credit, for which a Form 5884-B would normally attach to a form other than the parent form, they should utilize the General Parent Form Dependency to submit any required data relating to this form. However, if the taxpayer is claiming an amount for the New Hire Retention Credit on Form 8865, Schedule K, Line 15f, the Dependency "ItemizedOtherCreditsSchedule" should be attached to Schedule K, Line 15f, with entries in the relevant fields.	The Parent Form Return Data Schemas will not be updated unless Form 5884-B is available for Tax Year 2013.
Form 8606	Schema	Part II, Section Opener in Schema, shows "2011" instead of "2012".	No Impact	Schema will be updated for Tax Year 2013/Processing Year 2014.
Form 8621	IRS8621 element name ValueOfSharesRangeE	eFileType for F 8621 Part I Line 4e should be USAmountType not CheckboxType. Line 4e requires dollar amount entry if value of shares held at the end of the taxable year is greater than \$200K.	Attach stmnt to form to reference dollar amount in excess of \$200K.	Make change in Defect Drop 4.
Form 8621	DeemedDivElect1297ePFICStmnt Part II Elections Box G	New Schema Dependency requested in UWR 64065 was not implemented.	Attach stmnt that shows calculation of pro rata share of the post-1986 earnings and profits of the 1297(e) PFIC	Make change in Defect Drop 4.
Form 8858	Business Rules	Business Rules F8858-002 has an error on the verbaige. It uses the element name "TaxOwnerUSIdNumber" instead of "ForeignDisgrdEntityUSIdNumber".	When completing Form 8858 ensure that 'ForeignDisgrdEntityUSIdNumber' or 'ForeignEntityReferenceldNumber' have a value.	Business Rule will be updated for start up TY2012/PY2013
Schedule E (Form 1040)	PropertyUSAddress	Tax Year 2012 Version 4.0, Schema LineNumber is 1. Schema LineNumber should be 1a.	No impact.	This will be corrected for Tax Year 2013 / Processing Year 2014.

