~IMF / BMF TY2012 Known Issues and Solutions~ Processing Year 2013 As of January 17, 2013				
Form Type	**Schema/Schema Element**	**Description of the Problem**	**Temporary Solution(s)**	**Status**
W-2	Business Rule - New FW-2-XXX	W2-State and Local tax group MeF schema issue-state inf.	Disabled for Tax Year 2012	Updated schema will be available in Tax Year 2013
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Form 1040	Domestic Production Act Statement	The Form 1040 schema package includes the outdated Domestic Production Act Statement.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.
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.
Schedule E (Form 1040)	PropertyForeignAddress	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.
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 Scneario 4 for Form 1065.	Schemas will be corrected as soon as possible.

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Form 1065	OtherIncomeLoss	The 1065 Schema, Line 7 has a dependency with the element name "OtherIncomeLossStatement" but it does not allow filers to provide the appropriate information for this line.	Filers who will need to provide additional information for Line 7 of the Form 1065 will use the "GeneralDependencySmall" to provide the necessary information when needed. Use description "Other Income Loss Line 7"	Schemas will be corrected for TY2013/PY2012. Use this known issue for TY2012 returns.
Form 1065 **ATS ONLY**	IRS1065ScheduleK1	New Line I2 was set to be required on the schemas. This line should be optional.	While testing check the box on Line I2, 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 1120S **(ATS Only)**	IRS1120S GrossReceiptsOrSales	In Publication 4162, the ATS 1120S Scenarios No.4, No.5 and No. 6 have an entry on Form 1120S, line 1b, “Returns and allowances”.	The Entry on the ATS 1120S Scenarios No.4, No.5 and No. 6 Form 1120S, line 1b, “Returns and allowances”, should be input on Line 1a, “Gross receipts and sales”.	This issue only applies to the Publication 4162 that was distributed by the e-Help desk. The published version has been corrected.
Form 3468	TotalQlfyInvestmentCrAmt	Line 8 was RESERVED per WRN dated 3/14/12. Line 8 is RESERVED on stylesheet, but is not displayed as RESERVED on REL 8 v4.1 schema dated 12/6/12.	Do not populate entry on schema stylesheet, Line 8. Line 8 is being reserved for future use.	Schema will be updated for Tax Year 2013 Processing Year 2014.
Form 3468	CalcTotalQlfyInvestmentCrAmt	Line 8 was RESERVED per WRN dated 3/14/12. Line 8 is RESERVED on stylesheet, but is not displayed as RESERVED on REL 8 v4.1 schema dated 12/6/12.	Do not populate entry on schema stylesheet, Line 8. Line 8 is being reserved for future use.	Schema will be updated for Tax Year 2013 Processing Year 2014.
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 4562 **(ATS Only)**	BusinessIncomeLimitation	There is a stylesheet schema problem occurring with line 11	unknown temp solution	Make change in future Non-Leg Housekeepping Requirement UWR for Release 9
Form 5405	Business Rule 5405-027-01	Business Rule F5405-027-01 reads as follows: Form 5405, Line 1 'ChangeOfMainHomeDt' must be later than 04/07/2008 and prior to 01/01/2012. This rule does not reflect the correct ending date of 01-01-2013; it currently shows 2012.	Business Rule will validate per the element name but not for the correct time period to cover calendar year 2012 dispositions.	Business Rule will be corrected for Tax Year 2012 Processing Year 2013.
Form 5405	Schema/Schema Element	Change the RLO for Schema Development to correct various spelling errors, naming conventions.	unknown temp solution	This will be corrected for Tax Year 2013 Processing Year 2014.

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Form 5405	Business Rule F5405-022	Business Rule F5405-022 currently reads as follows: If Form 5405, Line 13e 'SpouseOrExName' has a value, then Line 13e 'HomeTransferredToSpouseOrExInd' must be checked. However, for TY 2012 returns, the correct line reference should be 'Line 3e' instead of 'Line 13e.'	A Business Rules Error ticket will be opened early in production to correct the business rule for TY 2012 returns.	Business Rule will be updated during production TY 2012 PY 2013.
Form 5471, Sch J	BalanceAtBOYExplanationStmt	The schema allows only one occurance of the dependency BalanceAtBOYExplanationStmt.	If multiple instances of the dependency are needed use the GeneralDependencMedium at the return level 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 8283 **(ATS only)**	Business Rule F8283-028	Setting incorrectly	Disabled in ATS (only)	The updated schema will be available on Dec 17, 2012
Form 8283 **(ATS only)**	Business Rule F8283-030	Setting incorrectly	Disabled in ATS (only)	The updated schema will be available on Dec 17, 2012
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 1 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 a General Dependency to the parent form entitled "Form 8621 Value of Shares Range E" to submit the required information.	Schema will be updated for tax Year 2013 Processing Year 2014.
Form 8621	DeemedDivElect1297ePFICStmt Part II Elections Box G	New Schema Dependency was not implemented.	Attach stmt that shows calculation of pro rata share of the post-1986 earnings and profits of the 1297(e) PFIC	Schema will be updated for tax Year 2013 Processing Year 2014.
Form 8621	DeemedDivElect1297ePFICStmt Part II Elections Box G	element name 'Calculation' shows incorrect element type as 'USAmountType' ; element name should be "LineExplanationType" and be unbounded.	unknown temp solution	Schema will be updated for tax Year 2013 Processing Year 2014.
Form 8853	SpouseTaxpayerHDHPStatement	Statement should be added to Section B of Form 8853 schema	If both spouses received MSA distributions in 2012 from Medicare Advantage MSA, use Form 1040 General Dependency to enter all information called for in the instructions for both the Primary and Secondary Taxpayer. The General Dependency Description should have "Section B. Medicare Advantage MSA Distributions." Enter the totals for both spouses for lines 10, 11, 12, and 13b in the corresponding lines	Schema will be updated for Tax Year 2013, Processing Year 2014
Form 8858	Business Rules	Business Rules F8858-002 has an error on the verbaige. It uses the element name "TaxOwnerUSIdNumber" instead of "ForeignDisrgrdEntityUSIdNumber".	When completing Form 8858 ensure that 'ForeignDisrgrdEntityUSIdNumber' or 'ForeignEntityReferenceIdNumber' have a value.	Business Rule will be updated for start up TY2012/PY2013

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Form 8912	Form1097BTCAmt	Schema listed as '1097BTCCrAmt' ; remove 'Cr' from schema	unknown temp solution	Schema will be updated for Tax Year 2013 Processing Year 2014.
Form 8912	InterestPaymentDate	Rel 8 TY 12 Review found no such element name on RLO.	Attach a General Dependency to the parent form entitled "Form 8912 Interest Payment Date" to provide the interest payment date information.	This will be corrected for Tax Year 2013 Processing Year 2014.
Form 8912	InterestPaymentAmt	Rel 8 TY 12 Review found no such element name on RLO.	Attach a General Dependency to the parent form entitled "Form 8912 Interest Payment Amount" to provide the interest payment amount information.	This will be corrected for Tax Year 2013 Processing Year 2014.
Form 8912	BondNotRptOn1097BTCDetail	No repeating group for lines 18a through 18f.	Attach a General Dependency to the parent form entitled "Form 8912 Bond Not Reported on 1097 BTC Detail" to provide the information.	Schema will be updated for Tax Year 2013 Processing Year 2014.
Form 8917	Business Rule - F8917-001	Setting incorrectly for Tax Year 2012	Disabled for Tax Year 2012	Updated schema will be available in Tax Year 2013
Form 8917	Business Rule - F8917-002	Setting incorrectly for Tax Year 2012	Disabled for Tax Year 2012	Updated schema will be available in Tax Year 2013
Form 8941	Line 1b - EmplmnTaxesReportEmplyerEIN	A software developer raised a concern during an ATS/PATS Production Conference Call about how to report multiple EINs for Line 1b. The instructions for F 8941 currently allow one EIN for line 1b unless a taxpayer qualifies for the exception.	Attach a General Dependency to the parent form entitled 'Additional EINs Reported on Form 8941 Line 1b' to provide the required information.	The schema will not change for Tax Year 2012 Processing Year 2013. Tax Forms & Publications will review Form 8941 to determmine if a change in the schema is necessary for subsequent tax years.
Form 8949	BadDebtStatement	Per the Instructions on the Schedule D (Form 1065), the Form 8949 asks for a statement to be attached to Part I Line 1, column (a), regarding a bad debt. Currently the XML for this statement has not been developed.	For the filers who will be required to attach a statement for any bad debt claim, attach a General Dependency to the parent form entitled "Form 8949 Bad Debt Statement" to allow the bad debt information to be submitted in TY12.	The General Dependency Medium should be use for all TY2012/PY2013 returns. An XML schema will be developed for TY2013/PY2014.