

# ATS and Production Issues

(Beginning November 2013 through April 2014)

**February 1, 2014**

Item#	Issue/Question	Date Opened	Resolution	Environment (ATS/Production)	Status
1	Multiple companies are reporting that they are receiving errors when testing the 1040 series of forms in ATS. The transmission error states that the transmitter must use a valid IP address.	11/4/2013	IRS will research these issues and provide a response as soon as possible. (11/4/13) This issue is affecting all transmitters. The IRS has opened an internal request with programmers to disable the following 1040 rules: IND-062, IND-063, IND-064, and IND-065. All of these rules are designed to allow the IRS to automatically capture the IP address in the return header, but the programming code is incorrect. The IRS hopes to have the applicable business rules disabled by tomorrow (November 6). (11/5/13) <i>The applicable business rules have been disabled as of November 6, 2013. (11/6/13)</i>	ATS	Closed 11/6/2013
2	<u>FileYourTaxes.com</u> (Timur) – Has the list of new WSDLs for use in ATS testing been distributed to the software providers?	11/4/2013	If you would like to receive the new WSDLs, please send an e-mail to the MeF Mailbox ( <a href="mailto:MeFmailbox@irs.gov">MeFmailbox@irs.gov</a> ). The e-mail request must include your company name and ETIN/EFIN number. The required WSDLs will be sent to you as soon as it is verified that you are a valid software developer, transmitter or State user. (11/4/13)	ATS	Closed 11/4/2013
3	<u>NY State AG Office</u> – We sent an issue to the MeF mailbox last week and received a solution that is not working for us. Can someone at the IRS provide assistance?	11/4/2013	The IRS will research the response sent to NY State via the MeF mailbox and provide a response as soon as possible. (11/4/13) MeF has submitted the solution to a subject matter expert to review and provide an answer on how to program the WSDLs properly for the state. (11/5/13) AG office states that this is apparently an issue with the JAVA application. The AG office contacted IBM and IBM is looking into it. This issue can be closed per the AG office. (11/15/13)	ATS	Closed 11/15/2013
4	<u>Urban Institute</u> – Is the "la.alt" URL for ATS ( <a href="https://la.alt.www4.irs.gov/a2a/mef">https://la.alt.www4.irs.gov/a2a/mef</a> ) load balanced so that transmitters can test their cookie code? Will the ATS system generate an error message if the code is not correct?	11/4/2013	The ATS system will not generate an error message, but the IRS has a process to test the la.alt URL for providers. The IRS can provide more assistance if a specific query is sent via the MeF mailbox. (11/4/13)	ATS	Closed 11/4/2013

## ATS and Production Issues

(Beginning November 2013 through April 2014)

**February 1, 2014**

5	<u>Online Taxes</u> – We have sent a question into the MeF mailbox. We have tried different combinations to try to get past the SOAP error message, but have not succeeded. Can the IRS provide a solution?	11/4/2013	The IRS will research this issue and provide a response as soon as possible. (11/4/13) Same issue as item # 1. (11/5/13)	ATS	Closed 11/5/2013
6	<u>Corp Tax</u> – Tried submitting 1065 files in ATS and got 4 different error messages. We have submitted the list of error messages to MeF via the e-Help Desk (e-case).	11/4/2013	MeF is working with our programmers to see why the applicable business rules that are causing the 1065 file rejects have not been disabled in ATS for Tax Year 2013. We will provide a resolution to this issue as soon as possible. (11/4/13). The rules discussed in the e-case have been disabled. However, the vendor noted that they are still receiving an error message for rule number <u>904-03</u> . IRS researched the rule and found an error requiring the rule to be disabled in ATS. MeF expects the rule to be disabled by Friday morning. Externals can try to resubmit tests after 1 pm CST Friday afternoon. Corp Tax confirmed that this issue has been resolved. (11/7/13)	ATS	Closed 11/7/13
7	<u>Taxware Systems</u> - Will there be a Quick Alert issued by the IRS when the IP address issue (item # 1) is resolved?	11/5/2013	MeF will update this call log with the information but will not issue a Quick Alert. MeF does not want to send out them out for non-critical issues during this first week of ATS testing. (11/5/13)	ATS	Closed 11/5/2013
8	<u>Taxware Systems</u> – Most IP addresses used in by providers are private. Will this cause an issue?	11/5/2013	The business rules involving the transmitter IP address are designed to automatically populate the IP addresses based on the HTTP traffic MeF receives. Thus, transmitting a private IP address is not possible. (11/5/13)	ATS	Closed 11/5/2013
9	<u>Ultratax</u> – Will the business rules prevent private IP addresses from being used during testing?	11/5/2013	No. (11/5/13)	ATS	Closed 11/5/2013

## ATS and Production Issues

(Beginning November 2013 through April 2014)

**February 1, 2014**

10	<u>FileYourTaxes.com</u> (Timur) – Are you asking software providers to populate the transmitter IP address in the header?	11/5/2013	No. The system is set up to do that automatically for the software providers. (11/5/13)	ATS	Closed 11/5/2013
11	<u>Online Taxes</u> – Isn't the software provider's system sending a private IP address to the IRS?	11/5/2013	The business rules involving the transmitter IP address are designed to automatically populate the IP addresses based on the HTTP traffic MeF receives. Thus, transmitting a private IP address is not possible. (11/5/13)	ATS	Closed 11/5/2013
12	<u>Taxwise</u> – Can software providers assume that the IP address in the 1040 header is correct?	11/5/2013	Yes. (11/5/13)	ATS	Closed 11/5/2013
13	<u>Vertex</u> – We have issues with inconsistent logins. We sometimes receive error messages or an obscure HTML response page when logging in. We sent a more detailed explanation to the mailbox.	11/5/2013	Troubleshooting is being performed between the subject matter experts to resolve the issue. The system logs have been sent to the MeF Mailbox and they will provide feedback. (11/5/13)	ATS	Closed 11/5/2013
14	<u>Taxware</u> – We received the A2A Toolkit v4. We noticed a new URL in one of the config files. Should we use that new URL?	11/5/2013	No. That address was used to test the toolkit prior to the IEP Cutover in August. Vendors should follow the instruction in the “User Guide” included on the toolkit and change the URL in the config files to <a href="https://la.www4.irs.gov/a2a/mef">https://la.www4.irs.gov/a2a/mef</a> before using it in Production. MeF will send a clear message to the vendors who received the toolkits on this issue. (11/5/13)	ATS	Closed 11/5/2013
15	<u>Ultratux</u> – For a couple of tax forms, Schema version 2.1 posted to IRS.gov shows business rules, but no schemas. We were wondering if the applicable schemas will be posted.	11/5/2013	Yes, we are in the process of posting the schemas. (11/5/13)	ATS	Closed 11/5/2013

## ATS and Production Issues

(Beginning November 2013 through April 2014)

**February 1, 2014**

16	<u>Online Taxes</u> – Getting error code F7004-011-01 in regards to Form 7004 submissions. Submitted information to the IRS.	11/6/2013	The IRS will research this issue and provide a response as soon as possible. (11/6/13) F7004-011-01 was disabled on 11-05-13. The IRS has been accepting Form 7004 returns after the rule was disabled. Online Taxes has informed the IRS that all of their 7004 form submissions have been accepted in ATS and this item can be closed. (11/7/13)	ATS	Closed 11/7/13
17	<u>Online Taxes</u> – Getting error code F720-086-01 in regards to Form 720 submissions. Has this rule been disabled in ATS?	11/6/2013	The IRS will research this issue and provide a response as soon as possible. (11/6/13) MeF researched business rule F720-086-01 and could not find any issues with the business rule or any e-cases that explain the problem in more detail. We advise the software provider to check the applicable submission to ensure that the received date is not prior to the current Qtr date. If the filer has a submission ID, they can call the e-help desk and the e-help Desk will escalate it to an IRS subject matter expert if necessary. (11/7/13) Online Tax is still getting error messages in the test scenarios when using quarter ending March 2014 data. IRS researched the issue and a ticket was opened with our programmers to disable business rule 720-086-01 in ATS. (11/13/13)	ATS	Closed 11/15/13
18	<u>Taxwise</u> – We have a suggestion for the ATS Known Issues and Solutions lists. Add the primary ssn number or the EIN number in addition to the scenario number.	11/6/2013	The IRS will attempt to incorporate this suggestion into the ATS Known Issues and Solutions lists. (11/6/13)	ATS	Closed 11/6/13
19	<u>State of Kentucky</u> – When we attempt to download submissions, we receive an error message that the request cannot be processed. Can the IRS provide more assistance?	11/6/2013	Submit more detailed information to the MeF mailbox and the IRS will work with you on providing a solution. (11/6/13)	ATS	Closed 11/6/13

## ATS and Production Issues

(Beginning November 2013 through April 2014)

**February 1, 2014**

20	Online Taxes – For Form 8868 submissions, we are getting several error messages. Will the applicable rules be disabled in ATS?	11/6/2013	No. The problems with the Form 8868 submissions are not with incorrect business rules. Rather, it's a database issue that is affecting vendors across the board. The IRS is working on correcting the database issue as soon as possible. (11/6/13) The database issues have been resolved. Online Taxes confirmed that they are able to submit Form 8868 submissions. (11/8/13)	ATS	Closed 11/8/13
21	Drake Software – In regards to the transmitter issue in item 1, will software providers need to re-release their WSDLs once the applicable Business Rules have been corrected?	11/6/2013	No. The IRS is changing our code, so no action is required for the software providers.	ATS	Closed 11/6/13
22	Drake Software – We have yet to receive our 1040 software ID. We submitted the applicable questionnaire last week.	11/6/2013	The IRS will research this issue and provide a response as soon as possible. (11/6/13) Vendor confirmed that software ID has been received. (11/7/13)	ATS	Closed 11/7/13
23	Online Taxes - We noticed an issue with scenario # 2 in the 1040 family. The W-2 Form has state income tax, which can affect the tax calculation in the scenario. Was the inclusion of the state income tax on the W-2 form intentional?	11/8/2013	Yes. In Test Scenario #2 the primary and secondary taxpayer will report state taxes paid on Schedule A (Form 1040). (11/8/13)	ATS	Closed 11/8/13

## ATS and Production Issues

(Beginning November 2013 through April 2014)

**February 1, 2014**

24	<u>Online Taxes</u> – In scenario # 8 of the 1040 family, the 1040-SS form asks for a figure from a worksheet for the Additional child tax credit (Part II, line 3). Does MeF know what amount should be put on this line?	11/8/2013	The IRS researched this issue and referred the issue to the E-Help desk. The E-Help desk has contacted the vendor and should be able to assist with the TY2013 1040 SS – Additional Child Tax Credit Worksheet. (11/8/13) Vendor confirmed that this issue has been resolved. (11/13/13)	ATS	Closed 11/13/13
25	<u>Online Taxes</u> – There appears to be a disconnect between the e-help desk and the MeF mailbox team. Specifically, we do not always get feedback from the e-help desk when we open a ticket. How do we know if an e-help desk ticket has been closed and the applicable issue resolved? Several other vendors concurred.	11/8/2013	The E-help desk noted that e-help desk assistors should be following up on the original ticket number. The IRS advises software providers to always stick with the original e-help desk ticket number. If software providers provide the IRS with original ticket numbers, the E-Help desk office can research the issue and provide information. (11/8/13)	ATS	Closed 11/8/13
26	<u>Ultratax</u> - Here are 3 original E-help desk tickets that we are awaiting resolution: SD 643177 SD 721568 SD 759378	11/8/2013	The IRS will research this issue and provide a response as soon as possible. (11/8/13) E-Help desk analysts have conducted research on the applicable ticket numbers given by Ultratax. Information will be provided to Ultratax during the ATS conference call as well as via e-mail. (11/14/13) The E-Help desk has contacted Ultratax to resolve these ticket items.	ATS	Closed 11/15/13

## ATS and Production Issues

(Beginning November 2013 through April 2014)

### February 1, 2014

27	Urban Institute – It appears that the EIN database was updated so that older EINs from last year's testing will no longer work. Will the current EINs allow us to test older tax years?	11/8/2013	Yes, the database was updated on November 8, 2013. The Business rules that we implemented should be for all tax years. The IRS will research to make sure. (11/8/13) We confirmed on 11-8-13 that the business rule that enforces the EINs in ATS to begin with 00, only applies to TY2013. The database was updated on 11-12-2013 to add the EINs beginning with 11 for prior year testing. Urban confirmed the 2012 returns were accepted on 11-12. (11/13/13)	ATS	Closed 11/13/13
28	Taxwise – On Test Scenario # 5, is it ok to have the figure out to 5 decimal places? The E-help desk indicated they were still waiting for clarification from MeF.	11/13/13	Yes. We will clarify this issue with the E-Help desk office. (11/13/13)	ATS	Closed 11/13/13
29	Urban Institute – On our EO submissions, is there a get submissions reconciliation list? Some of the receipts do not appear to be showing up in the no ack request list.	11/13/13	The IRS has opened a ticket with IBM and sent them your submissions for review. We have not received any feedback from IBM yet. (11/13/13) Issue has been resolved (12/19/13)	ATS	Closed 12/19/13
30	State of New York – A vendor contacted us in regards to reject error code 001. We submitted this information to the IRS. Does the IRS have a resolution yet?	11/13/13	The IRS has opened a ticket with programmers and is working the issue. We will provide a resolution as soon as possible. (11/13/13) Issue has been resolved (12/19/13)	ATS	Closed 12/19/13
31	E-Help Desk – We have discovered an issue in ATS regarding Form 56 submissions. Software providers are receiving parser errors in ATS.	11/13/13	IRS will research this issue and provide a response as soon as possible. (11/13/13) IRS worked with the vendors and has resolved this issue. Externals are able to successfully submit IRS Form 56. (12/19/13)	ATS	Closed 12/19/13



## ATS and Production Issues

(Beginning November 2013 through April 2014)

**February 1, 2014**

32	<u>FileYourTaxes.com</u> (Timur) – Wanted to note that the lack of instructions for the 1040 forms is really burdensome to developers as they are attempting to test forms in ATS. For example, one of the test scenarios needs a worksheet from the 1040 instructions to determine whether or not to attach Form 6251. Does MeF know when the 1040 instructions will be posted to IRS.gov?	11/15/13	Unfortunately, no. If you send the specific data into the MeF mailbox, MeF can revisit the issue to make sure that software providers can complete ATS testing with the applicable instructions. The provider acknowledged that they could make an adjustment to the scenario in order to complete testing, but they would prefer not to do exception testing. Another vendor noted that the worksheet may be located in the Form 6251 instructions, which are available. FileYourTaxes.com agreed to check the Form 6251 instructions and also agreed to send more specific data into the MeF mailbox. (11/15/13)	ATS	Closed 11/15/13
33	<u>Rob</u> : Can the various MeF workgroups please provide an update?	1/31/14	<u>1040</u> : We are currently in the process of updating 1040 business rules and will be posting a change page to IRS.gov. The changes involve Forms 1040, 1040A, 1040-EZ, and 1040-SS, and included 3 new business rules for Schedule A. <u>1041</u> : We will be posting a change to version 4.1 to IRS.gov. We have disabled or deleted a couple of business rules for Form 1041. The <u>94X</u> , <u>1120</u> , and <u>TEGE</u> work groups all reported no updates. (1/31/14)	Production	<b>Closed</b> <b>1/31/14</b>
34	<u>Question</u> : Can you give a brief description of the business rule changes involving Schedule A?	1/31/14	<u>IRS</u> : The business rule changes involve the math calculations for line 3 of Schedule A, whereby taxpayers are asked to multiply line 2 of Schedule A by either 10% or 7.5%. (1/31/14)	Production	Closed 1/31/14
35	<u>Ski</u> : I want to provide information and statistics for the first day of production in MeF.	2/1/14	<u>13 million returns have been filed in MeF – 10 million federal returns and 3 million state returns. The reject rates are 9.9% for IMF returns and 9.5% for BMF returns. The top 2 rejects are: 1) Primary EFIN number does not match the EFIN number in the E-File database, and 2) Dependent SSN does not match the SSN information shown in the E-File database. Each of these rejects represents 33% of the total amount of rejects reported for MeF. (2/1/14)</u>	Production	<b>Closed</b> <b>2/1/14</b>



## ATS and Production Issues

(Beginning November 2013 through April 2014)

**February 1, 2014**

35	<u>Rob</u> : Can the various MeF workgroups please provide an update?	2/1/14	<u>1040</u> : We have posted the Business Rule changes involving the math calculations for line 3 of Schedule A, whereby taxpayers are asked to multiply line 2 of Schedule A by either 10% or 7.5%, to a change page in <u>IRS.gov</u> . The specific business rules are SA-F1040-019, SA-F1040-020, & SA-F1040-021. <u>1041</u> : We will be posting a change to version 4.1 to IRS.gov. We have disabled or deleted a couple of business rules for Form 1041. The <u>94X</u> , <u>1120</u> , and <u>TEGE</u> work groups all reported no updates. (2/1/14)	Production	<b>Closed 2/1/14</b>
<b>We will be holding daily conference calls thru Friday, February 7<sup>th</sup>. The next meeting will be on Sunday, February 2nd - Time: 4:00 pm EST.</b>					

*0 issues remain open.*

*\*The latest updates are highlighted in blue.*