

Publication 1436 Change Page for 1040/4868 MeF scenarios

The Publication 1436 combines the current e-File system test scenarios and the Modernized e-File (MeF) test scenarios. The changes below for scenarios 1, 2 and 3 apply to both the current e-File system and MeF. Test Scenario 5 changes apply to the MeF scenario only.

01/31/2010 Revision

Item #	Test Scenario #	Publication 1436 Page #	Change	Date Changed
1	1	55	Form 1099-R - change recipient's zip code to 94102	10/29/2009
2	1	52	Add Other Withholding Statement: WITHHOLDING CODE WITHHOLDING AMOUNT FORM 1099 20000	1/31/2010
3	2	63	Preparer's City changed to Buffalo	10/29/2009
4	3	71	Preparer's City changed to Buffalo	10/29/2009
5	3	72	Form W-2 Box 3 - changed to 106,800	10/29/2009
6	3	73	Schedule A - Line 10 changed to 3200 Line 13 changed to blank or zero	10/29/2009
7	3	74	SELLER FINANCED INTEREST 700 300 SCH B TEST ADDRESS NY, NY 10007 400-00-1111 700 INTEREST PAYER 1 1300 (changed from 300) INTEREST PAYER 2 1000 NOMINEE PAYER 1 500 NOMINEE PAYER 2 500 INTEREST SUBTOTAL 4000 NOMINEE DISTRIBUTION 1000	10/29/2009
8	3	76	Form 2106 Part II Line 11 - change date to 02/17/2009	10/29/2009
9	5	various	Change City to Grubville for all addresses with Zip code 63041	10/29/2009
10	5	n/a	Form 1099-R missing in scenario - it is attached to this file	10/29/2009
11	5	96	Schedule A Line 29 - "No" box should be checked	10/29/2009
12	5	97	Sch C - Stan Blue - Part I change to Line 1 530000 Line 2 10000 Line 3 520000 Line 4 30000 Line 5 490000	10/29/2009
13	5	110	Form 4562 - Line 20c(c) changed from 100,000 to 104,350	11/6/2009
14	5	88	Award amount changed to 1150	11/6/2009
15	5	91	Form W-2 (Sandy Blue) Line 17 changed to 500 & 200 Line 19 chanegd to 500 & 600	11/6/2009
16	5	96	Schedule A Line 5 changed to 3000 Line 6 changed to 1500 Line 9 changed to 4500 Line 10 changed to 1500 Line 15 changed to 1500	11/6/2009

17	5	93	Line 33 should be blank in the Publication (73 is not correct)	11/20/2009
18	5	105 & 106	Form 2441 Line 1 and Line 18: change to 3300	11/20/2009

Note: In 1040 MeF test scenario 5, TP elects to apply withholding to quarters actually worked

☐ CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code XYZ Company 15 Oak Street Sacramento, CA 94203		1 Gross distribution \$ 20000		OMB No. 1545-0119 2009 Form 1099-R		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.		
		2a Taxable amount \$						
		2b Taxable amount not determined ☐		Total distribution ☐				
PAYER'S federal identification number 69-0000010		RECIPIENT'S identification number 400-00-1035		3 Capital gain (included in box 2a) \$		4 Federal income tax withheld \$	Copy B Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return. This information is being furnished to the Internal Revenue Service.	
RECIPIENT'S name STAN BLUE Street address (including apt. no.) 4000 5th Test St Apt 6 City, state, and ZIP code Grubville, MO 63041		5 Employee contributions /Designated Roth contributions or insurance premiums \$		6 Net unrealized appreciation in employer's securities \$				
		7 Distribution code(s) 1		8 Other \$ %				
		9a Your percentage of total distribution 80 %		9b Total employee contributions \$ 10000				
		1st year of desig. Roth contrib.		10 State tax withheld \$ 500 \$ 300		11 State/Payer's state no. MN 69-0000007 KS 69-0000006		12 State distribution \$ 5000 \$ 5000
		Account number (see instructions) 123456		13 Local tax withheld \$ 250 \$ 150		14 Name of locality Locality 1 Locality 2		15 Local distribution \$ 5000 \$ 5000

Form **1099-R**

Department of the Treasury - Internal Revenue Service

Note: Taxpayer did not receive a lump sum distribution

Draft as of
07/31/2008