

ATS and Production Issues

(Beginning November 2014 through April 2015)

January 30, 2015

Item#	Issue/Question	Date Opened	Resolution	Environment (ATS/Production)	Status
1	<u>IMF Branch</u> – We are researching a Known Issue with Business Rule R0000-906-02 (<i>Routing Transit Number (RTN) included in the return must be present in the e-File database</i>).	11/3/14	The routing transit number is the same number as last year. We will provide an update as soon as a resolution is known. (11/3/14) We have corrected the routing number to <u>101110271</u> . We have posted the correction to the PY 2015 Form 1040 - ATS Known Issues and Solutions document on IRS.gov (item # 7). (11/5/14)	ATS	Closed 11/5/2014
2	<u>IMF Branch</u> – We have identified an issue with Business Rule 8962-043.	11/3/14	We have submitted a request to disable the business rule in ATS. We will provide an update on the status of the request in the next few days. (11/3/14) We have disabled business rule 8962-043 in ATS. (11/5/14)	ATS	Closed 11/5/2014
3	<u>TE/GE Branch</u> – We have posted updates on 3 issues to the TY 2014 Form 990 Known Issues and Solutions template.	11/3/14	There is a workaround listed for one issue and an update to Form 990 Test 1, and 990 Test 3 for the other two issues. The Known Issues and Solutions sheet is posted to IRS.gov at the following link: http://www.irs.gov/Charities-&-Non-Profits/TY2014-Exempt-Organizations-MeF-Assurance-Testing-System-(ATS)-Test-Scenarios . (11/3/14)	ATS	Closed 11/3/2014
4	<u>Vermont</u> – We have a log in issue. Error message states that we have no matching XML. Have there been any changes implemented that would cause these type of issues?	11/3/14	<u>IRS</u> : These types of errors are most likely caused by a mismatch in selecting the production or ATS environment in the current release – 9.5. Please make sure you are matching the correct URL and code base to either production or ATS. (11/3/14) Vermont is still having log in issues. Syed confirms that the IRS has received a mailbox inquiry from Vermont and will work with Vermont to correct the problem. (11/5/14)	ATS	Closed 11/5/2014

ATS and Production Issues

(Beginning November 2014 through April 2015)

January 30, 2015

5	<u>Indiana</u> – We are receiving no data in our Get New Submission acknowledgement responses. The more available indicator is set to True.	11/3/14	<u>IRS</u> : Please send the submission IDs along with the reconciliation list to the MeF mailbox. We will research the issue and provide a response back to you as soon as possible. (11/3/14) We are working on the information provided by Indiana, and will provide a response once the issue has been identified and resolved. (11/4/14) We will continue to work with Indiana if additional issues arise. (11/14/14)	ATS	Closed 11/14/2014
6	<u>Online Taxes</u> - We are getting no response from our Form 990 submissions. We sent the submissions 3 hours ago.	11/3/14	<u>IRS</u> : We were able to conduct research on this issue and discovered that there was a business rule failure on the Form 990, Schedule A that was preventing the processing of TY2014 submissions. The issue has now been resolved. (11/4/14)	ATS	Closed 11/4/2014
7	<u>NY State</u> : Any updates on shutdown and startup dates?	11/3/14	<u>IRS</u> : We are in the process of finalizing the dates. We will send out an update via a QuickAlert in the next few days. In addition, we will post the dates to IRS.gov. (11/3/14) A QuickAlert was issued to software providers on Tuesday, November 04, 2014 providing the official 1040 Modernized e-File (1040 MeF) Production Shutdown/Cutover Schedule. (11/4/14)	ATS / Production	Closed 11/3/2014
8	<u>IMF Branch</u> – We have noticed an error on TY2014 1040 ATS Scenario # 3.	11/4/14	<u>IRS</u> : In scenario # 3, the net income for Schedule F was not intended to exceed the \$400 limit for calculating self-employment tax on Schedule SE. We plan to revise scenario # 3 to reduce the reported net income on Schedule F to below \$400, thus eliminating the need for a Schedule SE in this scenario. We will notify providers when this correction has been made to scenario # 3 on IRS.gov. (11/4/14) Scenario # 3 has been revised and the revised scenario has been posted to the 1040 ATS test package on IRS.gov. (11/5/14)	ATS	Closed 11/5/2014
9	<u>TE/GE Branch</u> – We have received feedback on test 1 for the Form 990 family.	11/4/14	We are going to update test # 1 to reflect the suggested changes. We will also update the ATS Known Issues and Solutions document for the Form 990 family on IRS.gov. (11/4/14)	ATS	Closed 11/4/2014

ATS and Production Issues

(Beginning November 2014 through April 2015)

January 30, 2015

10	<u>Online Taxes</u> – We have discovered issues with 2 business rules for the Form 720: business rule F720-167 and business rule R0000-922-01. Business Rule F720-167 is rejecting every Form 720 we have submitted. Error message states that 2015 is not allowed yet.	11/4/14	<u>IRS</u> : We will research this issue and provide a response as soon as possible. Any corrections to the business rules will be posted to the ATS Known Issues and Solutions document for the Form 720 family on IRS.gov. (11/4/14). Business Rule R0000-922-01 (<i>Filer's EIN and Name Control in the Return Header must match data in the e-File database, unless "Name Change" or "Name or Address Change" checkbox is checked, if applicable.</i>) has been disabled in ATS. Business rule F720-167 is in the process of being disabled. We will also be disabling business rules F720-166, F720-168 and F720-169 (<i>Not an ATS issue</i>). An update will be posted to the ATS Known Issues and Solutions document for the Form 720 family on IRS.gov. (11/5/14)	ATS	Closed 11/5/2014
11	<u>Online Taxes</u> : We have also found an issue with business rule R0000-922-01 for Form 8849.	11/4/14	<u>IRS</u> : We will research this issue and provide a response as soon as possible. Any corrections to the business rules will be posted to the ATS Known Issues and Solutions document for the Form 8849 family on IRS.gov. (11/4/14). Business Rule R0000-922-01 has been disabled in ATS. (11/5/14)	ATS	Closed 11/5/2014
12	<u>IMF Branch</u> : We have noticed an error on TY2014 1040 ATS Scenario # 4.	11/5/14	We have revised scenario # 4 so that lines 11 - A, B, & F are divisible by 12. We have posted the correction to the PY 2015 Form 1040 - ATS Known Issues and Solutions document on IRS.gov (item # 10). (11/5/14)	ATS	Closed 11/5/2014
13	<u>BMF Branch</u> : We need to make some changes to the ATS scenarios for the 1041 family.	11/5/14	We will revise the 1041 scenarios to address the changes by COB on Thursday, November 6 th . In addition, we will post these changes to the PY2015 ATS Known Issues and Solutions document for the Form 1041 family, which is in the process of being created. The new 1041 ATS Known Issues and Solutions document should be posted to the PY 2015 MeF ATS Updates page on IRS.gov by COB on Friday, November 7 th . (11/5/14)	ATS	Closed 11/5/2014

ATS and Production Issues

(Beginning November 2014 through April 2015)

January 30, 2015

14	<u>RSI Software</u> : We sent a mailbox inquiry reporting that we are seeing timeouts and slow responses in general in the ATS environment. When we send a few acks, they are OK. When we try to send 100 or more Acks, we get timeout errors.	11/5/14	<u>IRS</u> : We have received the message IDs of timeouts sent by RSI to the MeF mailbox. We are investigating the issue and will provide an update as soon as possible. (11/5/14) We are implementing a maintenance patch this weekend that should resolve most of the timeout issues. (11/7/14) The IRS received no new reports from RSI software after the weekend patch was implemented, so we are closing this item. (11/12/14)	ATS	Closed 11/12/2014
15	<u>NY State</u> : Is Form 1041 included in the Business MeF Production Shutdown/Cutover Schedule shown on the QuickAlert issued on 11/4/14?	11/5/14	<u>IRS</u> : Yes, Form 1041 is tentatively scheduled to shutdown beginning on Friday, December 26, 2014. (11/5/14)	ATS	Closed 11/5/2014
16	<u>Chris</u> – Several states have told us that they have not been able to pick up their state submissions.	11/6/14	<u>IRS</u> : We have also received that information from the states. We have opened a high priority ticket to investigate the issue. (11/6/14) We have monitored the state submissions today, and most of the state submissions are moving thru the MeF system and are able to be picked up by the states. (11/7/14)	ATS	Closed 11/7/2014
17	<u>IMF Branch</u> - We have identified an issue in regards to Form 8888 in the TY2014 1040 ATS Scenario # 2.	11/12/14	<u>IRS</u> : Form 8888, line 2a is 818 and it should be removed. We have revised TY2014 1040 ATS Scenario # 2 accordingly, and have posted an update to the PY 2015 Form 1040 - ATS Known Issues and Solutions document on IRS.gov (item # 11). (11/12/14)	ATS	Closed 11/12/2014
18	<u>BMF Branch</u> – Updates needed to be made to the scenarios for the 1041 form family.	11/12/14	<u>IRS</u> : We have recently posted updates to scenarios 3 and 4 for the 1041 form family to the MeF ATS updates page on IRS.gov. (11/12/14)	ATS	Closed 11/12/2014

ATS and Production Issues

(Beginning November 2014 through April 2015)

January 30, 2015

19	<u>BMF Branch</u> – Updates needed to be made to the scenarios for the 1120 form family.	11/12/14	<u>IRS</u> : We have posted 11 items to the ATS Known Issues and Solutions document for the Form 1120 family on IRS.gov. (11/12/14)	ATS	Closed 11/12/2014
20	<u>IMF Branch</u> – Updates or changes need to be made for several 1040 business rules.	1/20/15	<u>IRS</u> : We are working to resolve issues with the following 1040 related business rules: 1040-361-03; F1040EZ-011-01; F1040EZ-029-01; 1040-428; & 1040-429. We will post an update to IRS.gov. (1/20/15) Business Rules 1040-361-03; F1040EZ-011-01; and F1040EZ-029-01 were corrected in Sunday's (1/25) maintenance build. (1/23/15) We are still working on resolving the issues with business rules 1040-428 and 1040-429. (1/26/15) Business rules 1040-428 and 1040-429 are scheduled to be fixed in the February 8th maintenance build. (1/30/15)	Production	Closed 1/30/2015
21	<u>Development Branch</u> – We want to provide information on issues regarding IRS Form 8962.	1/20/15	<u>IRS</u> : We have noticed that Form 8962 submissions that have 0 or blank on both lines 24 and 25 are being rejected. We are working on a correction. In the meantime, preparers that discover that taxpayers have nothing to report on lines 24 and 25 of Form 8962 should not file this form until we resolve the issue. <i>Clarification: There is no correction planned for lines 24 and 25 being zero or blank. This is just a reminder that we are seeing a lot of rejects where both lines 24 and 25 are blank. If both lines are zero or blank, the taxpayer should not be filing F8962 as there is no PTC. Please see instructions for Form 8962 for additional information. (1/22/15)</i> In addition, when lines 12 – 23 under column C of Form 8962 are left blank, business rules will trigger a rejection. Taxpayers should enter a 0 on these lines under Column C instead of leaving them blank if they have no amount to report. (1/20/15) <i>Update: A fix has been requested for this and we will advise when the fix has been deployed. (1/22/15)</i>	Production	Closed 1/22/2015

ATS and Production Issues

(Beginning November 2014 through April 2015)

January 30, 2015

22	<u>Employment Tax Branch</u> - We have a couple of issues to report in regards to the 94x series of forms.	1/20/15	<u>IRS</u> : We have noticed that some providers are using Software IDs that begin with 15, which are used for Tax Year 2015 returns. We are not accepting Tax Year 2015 returns, so a Software ID that begins with 15 cannot be used. In addition, we have seen some providers using schema version <u>2015v3.0</u> for the TY2014 4th Quarter Returns (941, 941-SS(PR)). However, they should be using version <u>2014v3.0</u> , which became available on 1/09/2015. (1/20/2015)	Production	Closed 1/20/2015
23	<u>TE/GE Branch</u> : We have a couple of issues to report in regards to Form 990.	1/20/15	<u>IRS</u> : The total field line 11g(vi) of Form 990 / 990-EZ Schedule A is missing from the schema. This issue will be added as a known issue. In addition, on Form 990, Schedule H, the URL fields for lines 16a, 16b, and 16c in Part V, Section B, are currently defined as a checkbox in the schema. A workaround is currently being devised, and we will post the workaround when it's finalized. (1/20/15) We will post a workaround for the URL field lines for Form 990, Schedule H to the Production Known Issues and Solutions Log by cob on Monday, February 2nd. (1/30/15)	Production	Closed 1/30/2015
24	<u>Corp Tax</u> – We have been working with the IRS on fixing a timeout issue, and wanted to receive an update on a resolution.	1/20/15	<u>IRS</u> : We will follow-up with the Tech that has been assigned to work with Corp Tax on this issue.	Production	Closed 1/20/2015
25	<u>Corp Tax</u> - Has anyone heard if the state of Louisiana is ready to go for Processing Year 2015?	1/20/15	<u>IRS</u> : We will see if we are able to provide a status update from the state of Louisiana on tomorrow's call. (1/20/15) <i>Louisiana opened up for e-file returns on Tuesday, January 20th.</i> (1/21/15)	Production	Closed 1/20/2015
26	<u>Rick</u> – Will the daily maintenance windows reported on today's QuickAlert from the IRS remain in place for the foreseeable future?	1/20/15	<u>IRS</u> : Yes. We do not have an end date for the daily maintenance windows (4 to 5 am EST). However, we expect these daily windows will have minimal impact on software providers. (1/20/15)	Production	Closed 1/20/2015

ATS and Production Issues

(Beginning November 2014 through April 2015)

January 30, 2015

27	<u>Julie Rushin</u> : Has the EITC issue on Form 1040A been fixed?	1/20/15	<u>IRS</u> : Yes. (1/21/15)	Production	Closed 1/20/2015
28	<u>Petz Enterprises</u> – We wanted to know if the issues with Form 8962 noted in log item # 21.	1/21/15	<u>IRS</u> : If you are referring to the issue with business rule F8962-316, a fix was implemented in Sunday night’s build. Also, see the 1/21/15 updates for log item # 21. If transmitters continue to have other issues with Form 8962, please send an example into the MeF mailbox, and we will research the issue and provide a response. (1/21/15)	Production	Closed 1/21/2015
29	<u>Question</u> : Do you segment the top 5 error codes into type of filing: online vs. paid preparer?	1/21/15	<u>IRS</u> : No. (1/21/15)	Production	Closed 1/21/2015
30	<u>Development Branch</u> – We have noticed a spike in rejections for business rule F8962-006.	1/22/15	<u>IRS</u> : Research indicates that the special rounding rules for line 5 of Form 8962 are the cause of most of the F8962-006 rejections. Line 5 should not be rounded beyond 3 decimal places. We will provide additional information and instructions in the PY 2015 Known Issues and Solutions document on IRS.gov by the end of the week. (1/22/15)	Production	Closed 1/22/15
31	<u>TaxAct</u> - We are continuing to see Business Rule 8962-006 rejections due to rounding. The transmissions are rejected whether we round up or down on line 5 of Form 8962.	1/26/15	<u>IRS</u> : When computing the value for Form 8962 Line 5, do not consider digits beyond three decimal places when rounding to a three digit whole number. For example, to calculate Line 5, using Line 3 as \$15,200 divided by Line 4 \$11,490, the result is 1.324630113141862. Rounding to the final answer should only consider 1.324. See Form 8962 Line 5 instructions for how to round 1.324 to your final value of 132. If you are still receiving rejections even after making this adjustment, please send the information to us via the MeF mailbox, and we will respond back to you accordingly. (1/26/15)	Production	Closed 1/26/15

ATS and Production Issues

(Beginning November 2014 through April 2015)

January 30, 2015

32	Mark – We are seeing rejects for business rule F1040A-197-01.	1/28/15	IRS: This business rule is setting in error because the business rule references the incorrect line number. Business Rule F1040A-197-01 should be referencing Line 30 of Form 1040A instead of Line 28. A fix for this issue will be implemented sometime in March. In the meantime, payers have the option of filing Forms 1040 or sending an inquiry to the MeF mailbox if this business rule triggers a reject in error. In addition, we will post the issue to the TY 2014 Known Issues and Solutions sheet on IRS.gov. We expect this issue to have minimal impact. (1/28/15)	Production	Closed 1/28/15
33	Development Branch - We have noticed some rejects related to Form 8962.	1/30/15	IRS: When the amount entered on line 5 of Form 8962 is under 100%, we have noticed some filers are skipping lines 7 and 8. We are working on adding an explanation to the Production Known Issues and Solutions List next week. (1/30/15)	Production	Closed 1/30/15
The next meeting is TBD.					

0 issues remain open.

**The latest updates are highlighted in blue.*