



Modernized e-File
Assurance Testing System (ATS)
1040 Program Tax Year 2018

Software Developers Conference
September 20, 2018



MeF ATS 1040 Program

Agenda

- Key Points
- 1040 Program
- 1040 Scenarios
- 1040NR Scenarios
- Reminders
- Resources
- Questions



Key Points

- ATS will open October 29, 2018.
- Form 1040 schema version 2018v4.0 will be operational for ATS testing.
- Any forms not included in the 2018v4.0 will be available for ATS testing at a later date in Mid December.
- Forms 1040A & 1040EZ will be obsolete for Tax Year 2018



1040 Program

- Tax Year 2018 will include a total of 22 Form 1040 ATS scenarios.
 - 11 scenarios with the Form 1040
 - 1 scenario with the Form 1040SS/PR
 - 4 scenarios with standalone forms (F56, F2350, F4868, F9465)
 - 5 scenarios for 1040NR
 - 1 scenario with the Form 1040 and the new Form 965
- 13 out of the 22 scenarios will be functional in ATS on Oct. 29th.
- Remaining 9 scenarios will be available in December.



1040/1040NR Scenarios

13 Scenarios available when ATS opens.

| Scenario # | 1040 Forms in scenarios |
|------------|--------------------------------|
| 1 | 1040, Sch 1, Sch 5, W-2. 8962 |
| 4 | 1040, Sch 1, Sch 2, W-2 , 8962 |
| 5 | 1040, Sch 1, Sch 4, W-2 |
| 7 | 1040 , W-2, 8965 |
| 8 | 1040SS (PR), 499R – 2/W-2PR |
| 11 | 1040, Sch 6, SSA, 1042S |
| 12 | 1040, 8838-P, 8865, 8865 Sch O |
| 13 | 2350 |
| 14 | 4868 |
| 15 | 9465 |
| 16 | 56 |

| Scenario # | 1040NR Forms in scenarios |
|------------|--|
| 1 | 1040NR, 1040-S, 8888 |
| 5 | 1040NR, 8840, 8843, RRB-1042S, Identity Protection PIN |



1040/1040NR Scenarios (Cont'd)

9 Scenarios NOT available on Oct. 29th.

| Scenario # | 1040 Forms in scenarios |
|------------|---|
| 2 | 1040, Sch 1, Sch 5, W-2, Sch A, Sch C, Sch EIC, 8283, 8867, 8888 |
| 3 | 1040, Sch 1, Sch 4, 1099-R, Sch D, Sch E, Sch F, Sch SE, 4835, 6252 |
| 6 | 1040, Sch 3, W-2, Sch EIC, Sch 8812, 2441, 8862, 8863, 8867, 8880 |
| 9 | 1040, Sch 6, 8854 |
| 10 | 1040, Sch 6, RRB-1042S |
| 17 | 1040, Sch 1, Sch B (Form 1040), Sch D (Form 1040), 1116, 8949, 965, 965-A, and Form 965 Schedules A-H |

| Scenario # | 1040 NR Forms in scenarios |
|------------|--|
| 2 | 1040NR, Form 1040 Sch C, Form 1040 Sch D, Form 1040 Sch SE, 6251, 8288-A, 8959 |
| 3 | 1040NR, W-2, Form 1040 Sch E, 8805, 8854, SSA-1042S |
| 4 | 1040NR, W-2, Form 1040NR Sch A, 2106, 8283 |



Reminders

- You can test the available ATS forms and pass.
- Come back to test remaining forms that you support.
- ATS Calls will begin after ATS opens.
- Utilize the ATS resources



Resources

- ATS scenarios and Known Issues will be posted to IRS.gov.
- <https://www.irs.gov/e-file-providers/modernized-e-file-mef-assurance-testing-system-ats>
- Please forward general ATS related questions to the MeF Mailbox: WI.MeF.MailBox@irs.gov, with a subject line of: "ATS 1040 TY2018".
- For questions concerning the test scenarios please contact the e-Help Desk at 1-866-255-0654

Questions

