

KENTUCKY DEPARTMENT OF REVENUE

E-COMMERCE BRANCH

**Tax Year 2020**

Kentucky substitute form and software development information is posted on the State Exchange System (SES). We will maintain this document for Statuses/Announcements/Events. Our state web page (<https://revenue.ky.gov/Software-Developer/Pages/default.aspx>) will remain active for the KDOR Gateway-Withholding Tax Bulk Filing information and copies of the approval listings.

***MeF Status:***

|  |  |  |
| --- | --- | --- |
|  | **Test Region** | **Production Region** |
| **IMF** | Operational | Non-Operational – TY2020 Production start date 2/12/2021 |
| **BMF** | Operational | Operational |
| **ESTRST** | Operational | Operational |

***Schema Versions for processing year 2021:***

|  |  |  |
| --- | --- | --- |
|  | **Test Region** | **Production Region** |
| **IMF** | TY2020 – KYIndivdual2020v0.2  TY2019 – KYIndividual2019v1.0  TY2018 - KYIndividual2018v0.4 | TY2020 – KYIndivdual2020v0.2  TY2019 – KYIndividual2019v1.0  TY2018 returns – KYIndividual2018v0.4 |
| **BMF** | TY2020 – KYBusiness2020v0.1  TY2019 – KYBusiness2019v0.1  TY2018 – KYBusiness2018v0.3 | TY2020 – KYBusiness2020v0.1  TY2019 – KYBusiness2019v0.1  TY2018 returns – KYBusiness2018v0.3 |
| **ESTRST** | TY2020 – KYEstateTrust2020v0.1  TY2019 – KYEstateTrust2019v1.0  TY2018 – KYEstateTrust2018v0.2 | TY2020 – KYEstateTrust2020v0.1  TY2019 – KYEstateTrust2019v1.0  TY2018 - KYEstateTrust2018v0.2 |

***Known Issues:***

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| --- | --- | --- |
| **Date Added** | **Schema** | **Description/Action** |
|  |  |  |

***Announcements/Events:***

|  |  |  |  |
| --- | --- | --- | --- |
| **Date Added** | **\*Tax Type** | **Effective Date** | **Message/Information** |
| 7/1/2020 |  |  | KYST.**TY20** folder created |
| 7/24/2020 | BIT, FIT, PIT | 9/1/2020 | The Kentucky TEST REGION will be shut down in preparation of Tax Year 2020. All external testing will cease until the ATS start date in November. |
| 7/24/2020 | BIT | 7/16/2020 | TY2020 draft versions of the business income tax forms posted in the KYST.TY20.Forms.Business.Draft folder. 1D barcode layout posted to SES. |
| 7/24/2020 | BIT, FIT, PIT | 7/20/2020 | TY2019 version 1.0 of the Substitute Form Development Guide posted to SES |
| 7/24/2020 | PIT | 7/21/2020 | TY2020 draft versions of the individual income tax forms posted in the KYST.TY20.Forms.Individual.Draft folder. |
| 7/24/2020 | FIT | 7/24/2020 | TY2020 draft versions of the fiduciary income tax forms posted in KYST.TY20.Forms.EstateTrust.Draft folder. |
| 7/24/2020 | BIT, FIT, PIT | 7/24/2020 | We will not be accepting substitute forms for approval until the LOI is posted to SES. LOI ETA is 8/1/2020. |
| 8/3/2020 | BIT, FIT, PIT | 8/3/2020 | TY2020 LOI and Attachment A were posted to SES. Attachment A is required with the completed LOI. Kentucky will immediately start accepting substitute forms for approval. |
| 8/3/2020 | BIT, FIT, PIT | 8/3/2020 | Posted KY Pub 1345 to SES |
| 8/18/2020 | FIT, PIT | 9/1/2020 | The test region will be disabled for tax year 2020 preparations. It won’t reopen until ATS testing starts in November. |
| 8/21/2020 | BIT, FIT, PIT | 8/21/2020 | In response to SES notification issues, all users were deleted and added back to our KYST folder per SES guidance in an attempt to restore notification functionality. Users may need to re-evaluate their notification preferences |
| 9/16/2020 | Bit | 9/16/2020 | Posted TY2020 KYPub 4163, Draft Reject Codes and KYBusiness2020v0.1 to SES. |
| 10/6/2020 | FIT, PIT | 10/1/2020 | Posted TY2020 IMF Business Rules v1.0, IMF Reject Codes v1.0, KYIndivdual2020v0.1, TY2020 ESTRST Business Rules v1.0, ESTRST Reject Codes v1.0, KYEstateTrust2020v0.1 and TY2020 KY Publication 4164 to SES. These are draft versions of the schemas and intended to be used for ATS testing. IMF and ESTRST ATS testing is scheduled to begin on 11/16/2020. |
| 11/4/2020 | PIT | 11/4/2020 | Posted revised Form 740 and 740-NP; Posted revised KYIndividual2020v0.2 schema. Kentucky will not support a state issued debit card for refunds in tax year 2020. The PrepaidDebitCardInd and SpanishLanguageInd elements have been removed. Also, a change was made to the SchA.xsd and SchANP.xsd to allow for multiple other miscellaneous deduction descriptions. Added element OtherMiscExpDetail with max occurrences of 500. Added Items/OtherMiscExpDesc and /OtherMiscExpAmt; The OtherMiscExpDetail should be completed if the OtherMiscExp amount is greater than 0. OtherMiscExp should be the combined total of all the OtherMiscExpAmt values. |
| 11/4/2020 | PIT | 11/16/2020 | Revised KYIndividual2020v0.2 schema should be used for IMF ATS testing beginning on 11/16/2020. |
| 11/16/2020 | FIT, PIT | 11/23/2020 | IMF and ESTRST ATS start date delayed until 11/23/2020 |
| 11/23/2020 | FIT, PIT | 11/23/2020 | IMF and ESTRST ATS start date delayed until 12/7/2020 |
| 11/24/2020 | FIT, PIT | 11/24/2020 | Final forms were posted to SES |
| 12/3/2020 | PIT | 12/3/2020 | Free file letter of invitation distributed |
| 12/22/2020 | BIT | 12/22/2020 | BMF ATS open for all return types |
| 1/5/2021 | FIT | 1/5/2021 | Revised ATS schema KYEstateTruxt2020v0.1\_released \_01-05-2021 posted to SES |
| 1/7/2021 | BIT | 1/7/2021 | Production version of the schema and business rules/reject codes were posted to SES - Business Production Schema KYBusiness2020v0.1 01072021 |
| 1/7/2021 | BIT | 1/7/2021 | IRS BMF Production start date for 720 and PTE |
| 1/7/2021 | FIT, PIT | 1/7/2021 | Production version of the schema KYEstateTrust2020v0.1\_ProdRelease \_01-07-2021. There were no changes to the schemas other than to change the maturity level to Production. |
| 1/7/2021 | FIT, PIT | 1/7/2021 | Production version of the schema KYIndividual2020v0.2\_ProdRelease\_01-07-2021*.* There were no changes to the schemas other than to change the maturity level to Production. |
| 1/8/2021 | BIT | 1/8/2021 | Revised production schema, KYBusiness2020v0.1 01082021, posted to SES |
| 1/8/2021 | BIT, FIT | 1/11/2021 | Kentucky BMF Production start date for Forms 720 and PTE; Kentucky ESTRST Production start date |
| 1/19/2021 | PIT | 1/19/2021 | IRS Round 1 controlled launch start date for prior year returns; end date 1/21 – Kentucky participating |
| 1/19/2021 | BIT | 1/19/2021 | Kentucky BMF Production start date for Form 725 |
| 1/19/2021 | PIT | 1/19/2021 | IRS Round 2 controlled launch start date – TBD – Kentucky will participate |
| 1/19/2021 | PIT | 1/22/2021 | IRS/Kentucky IMF Production start date |

\*BIT – Business Income Tax

\*FIT – Fiduciary Income Tax

\*PIT – Personal Income Tax

\*WTH – Withholding Tax