



New York State Department of Taxation & Finance

Free File Alliance (FFA)



May 17, 2004

New York State

- Participated for TY02 and TY03
- Simple approach
 - Letter of invitation
 - Member of Free File Alliance
 - Pass IRS and NYS (PATs) Participant Acceptance Testing System
 - Offer free filing for NYS taxpayers
 - NYS agrees not to compete for one year

New York State TY02 and TY03

- **Program Activity**
 - Approximately 44,000 tax returns filed each year (no growth)
 - Two vendors offered free filing for both Federal and State returns (no growth)

New York State

- **Major Concern and Issues**
 - Lack of growth and vendor participation at the state level
 - 15 vendors – federal participation TY03
 - 3.4 million taxpayers filed federal returns (22% increase over last year)
- **TY02 Feedback**
 - Confusion and frustration by offers that included “free state returns” when the taxpayer paid a fee for the federal return

New York State

- **Goals/Expectations for TY04**
 - NYS expects to offer letter of invitation with our same criteria
 - NYS supports the IRS efforts increase vendor participation
 - NYS strongly encourages vendor to offer both free federal and state filing

New York State www.nystax.gov



- **Web Site**
 - Click on company name to find out more about the offer/company
 - Click on [“Start Now!”](#) to begin the processing your return
 - Defined terms for Federal Adjusted Gross Income and Earned Income Credit
 - Link to Department e-filing Web Page

New York State

Your Tax Filing
Made Easier.



- Web Site (continued)
 - Link to Important Information Page
 - Disclaimer
 - Services provided by independent commercial companies
 - Refund Anticipation Loan Program (RALs) is your choice, not required

New York State Web Site (sample)



New York State

Governor Pataki

map-NY

e-bizNYS

Citizen Guide

Find Answers!
Taxpayer Answer Center

Free E-filing for Qualified NYS Taxpayers

New York State taxpayers meeting certain criteria may qualify for free tax preparation and e-filing of their tax year 2003 New York State personal income tax return. Click on a software provider's name to learn more about its offering. Click on the [Start Now!](#) link to connect to their Web site and begin filing your return.

Note: Not every taxpayer qualifies for the free services. Please read carefully the information provided by the company to determine your eligibility and read our [Important information page](#).

Free federal and state tax preparation and e-filing:

TurboTax for the Web: Free federal and state tax preparation and e-filing if you:

- Qualify for the federal [Earned Income Credit \(EIC\)](#), or
- During calendar year 2003:
 - Were age 62 or older (taxpayer or spouse), or
 - Were age 22 or younger (taxpayer or spouse), or
 - Served active Military duty (including Reservists and National Guard). You must have a 2003 Form W2 from the Military. [Start Now!](#)

TaxSlayer: Free federal and state tax preparation and e-filing if you:

- Are active duty Military personnel, or
- Have [federal adjusted gross income \(FAGI\)](#) of \$30,000 or less. [Start Now!](#)

If you do not qualify for these free offers, please [click here](#) to view other online service providers offering an assortment of e-filing products and services for various fees.

New York State www.nystax.gov



New York State

Governor
Pataki

map-NY

e-bizNYS

Citizen
Guide

Find Answers!
Taxpayer
Answer Center

Information Regarding Electronic Filing

1. The Department of Taxation and Finance does not warrant, endorse or recommend specific products or businesses, but does promote the availability of electronic tax preparation and services.
([Disclaimer](#))
2. These services are provided by independent commercial companies, not by New York State. The scope of and approach to tax return preparation and filing varies among each service provider. Please read carefully the information provided by the company to fully understand the service that is offered. Any inquiries for assistance must be handled through the service provider's Web site, not through New York State.
3. If you qualify for a refund and the service you choose offers a Refund Anticipation Loan Program (RAL), participation in the RAL program is strictly your choice. It is not required to utilize tax return preparation and e-filing services. Please also be aware that the Department of Taxation and Finance has no involvement with RALs.

New York State



New York State
DEPARTMENT OF TAXATION AND FINANCE
www.nystax.gov

HELEN PELERSI
Director
TAXPAYER SERVICES STRATEGY BUREAU

Bldg. 8 Room 757
WA Harriman Campus
Albany NY 12227

Telephone: (518) 457-3444
Fax: (518) 485-2348
E-mail: Helen_Pelersi@tax.state.ny.us