

THIS PUBLICATION SUPERSEDES ALL PREVIOUSLY RELEASED EDITIONS OF INFORMATION BULLETIN NO. 9 EFFECTIVE ON THE REVISED DATE SHOWN ABOVE

The NYC Department of Finance authorizes the reproduction of final versions of NYC tax forms and instructions by third parties holding a NYC Department of Finance-issued Vendor ID number, in accordance with the guidelines and specifications outlined in this publication. The NYC Department of Finance reserves the right to reject any form that does not meet the specifications set forth in this publication. Notification of changes to details in these guidelines and specifications will be distributed when they are revised or appended.

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## WHAT'S NEW

- **Updates in submission guidelines for all forms.** See pages 10 through 13.
- **Updates in mailing instructions for 200V voucher samples.** See pages 11 and 13.
- Elimination of Approval Period. See page 12.
- Account Type Code **216** (Hotel Room Occupancy Tax - Bed & Breakfasts) has been eliminated
- Redesigned 2021 Form NYC-204EZ
- Important changes to Form NYC-2.5A.
- Opportunity Zone Addback - The General Corporation Tax and the Business Corporation Tax have been amended to add a modification to federal taxable income when calculating entire net income requiring the immediate recognition of the capital gain deferred with respect to amounts invested in Qualified Opportunity Zones as provided in IRC section 1400Z-2(a)(1)(A).

**Visit The New York City Department of Finance's Website at:**

**[nyc.gov/finance](https://www1.nyc.gov/site/finance)**

**For direct online access to New York City business tax forms, go to:**

**<https://www1.nyc.gov/site/finance/taxes/business-forms/business-forms.page>**

## **I. GENERAL REQUIREMENTS**

- A. Vendor ID Number** - All software vendors developing and requesting approval for New York City substitute forms are required to obtain a Vendor ID Number which will be used as a source identifier for the forms being reproduced. The ID number will be embedded in the barcode on select scannable forms and also placed as a 2-digit equivalent on ALL forms reproduced by a vendor. For vouchers with scanlines, See page 8 for Vendor ID number location requirements. *To request a Vendor ID number, contact Cono Fusco at the NYC Dept. of Finance's Office of Forms Development at: [fuscoc@finance.nyc.gov](mailto:fuscoc@finance.nyc.gov)*
- B. Layout size and Font Requirements**
- Size - 8.5 inches x 11 inches
  - Background - White
  - Content color - Black
  - Font Size - A minimum size of 9 points is required for all variable data
  - Font Style - Any fixed-width plain font, such as courier or sans serif, is recommended
- C. All Pages** - All pages of the forms must be reproduced even though no entries are necessary on some pages.
- D. Page Sequence** - All pages and schedules must be arranged in the same sequence as the official version of the form.
- E. Legibility** - The reproduced form must be legible both as to form, structure and filled-in matter.
- F. Software Vendor Certification** - All software vendors who submit substitute forms for approval are required to file with the NYC Department of Finance a signed certification to guarantee that the software vendor will INCLUDE all taxpayer instructions (including any updated instructions issued subsequent to the publication of the form) exactly as issued by the NYC Department of Finance, with respect to ANY forms included in the software package or forms library. A sample of such certification follows. This must be submitted yearly on company letterhead and signed by an officer of the corporation. The Department further reserves the right to request a sample copy of the software product to verify that the instructions have been included. The certification must be received by the Department of Finance before any form approval can be issued. See sample on page 2.

**SOFTWARE VENDOR CERTIFICATION SAMPLE**

**Software Vendor Certification on Inclusion of Instructions with all New York City Tax Forms**

*To be submitted on company letterhead and signed by corporate officer.*

“In accordance with the New York City Department of Finance’s Guidelines and Specifications for the Reproduction of New York City Tax Forms (i.e. Information Bulletin No. 9), I hereby certify that *[company name]* has reproduced all instructions, as promulgated by the NYC Department of Finance, to accompany each tax form included in our *[Tax Year]* software product. Furthermore, any updated instructions subsequently issued by the New York City Department of Finance will also be reproduced in accordance with Information Bulletin No. 9 and provided to the customers of the aforementioned company.”

**II. SPECIFIC REQUIREMENTS FOR ALL NYC SUBSTITUTE FORMS**

**A. Scannable Forms** - For tax year 2021, the following forms are scannable.

Scannable forms use either a *barcode* or a *scanline*.

**Form Categories**

COR = Business Corporation Tax (Corporations *other* than S Corporations)

GCT = General Corporation Tax (S Corporations only)

UBT = Unincorporated Business Tax

BCT = Banking Corporation Tax

UTX = Utilities/Excise Tax

HTX = Hotel Tax

CRA = Commercial Rent Tax

EMP = Non-Resident Employee Return

E911 = E-911 Surcharge by Telecommunication Providers

OTH = Other

<b>FORM</b>	<b>FORM CATEGORY - FORM DESCRIPTION</b>	<b>FORM ID</b>
NYC-399	OTH - Schedule of Depreciation Adjustments	005
NYC-399Z	OTH - Depreciation Adjustments Post 9/10/01	006
NYC-9.5	OTH - Claim for Reap Credit	007
NYC-9.8	OTH - LMREAP Credit GCT/COR/Bank	008
NYC-9.12	OTH - Claim for Beer Production Credit	012
NYC-FP	OTH - Annual Report of Fire Premiums Tax Upon Foreign and Alien Insurers	013
NYC-1	BCT - Tax Return for Banking Corporations	100
NYC-1A	BCT - Combined Tax Return for Banking Corporations	101
NYC-222B	BCT - Underpayment of Estimated Tax by Banking Corporations	103
NYC-400B	BCT - Estimated Tax	104
CR-A	CRA - Commercial Rent Tax Annual Return	200
NYC-3A	GCT - Combined Tax Return	301
NYC-3L	GCT - Tax Return (Long Form)	302
NYC-400	GCT - Estimated Tax	303
NYC-4S	GCT - Tax Return (Short Form)	304
NYC-3A-ATT	GCT - Schedules C, D, F and G - Attachment to Form NYC-3A	305
NYC-3A/B	GCT - Subsidiary Detail Spreadsheet Attachment to Form NYC-3A	306

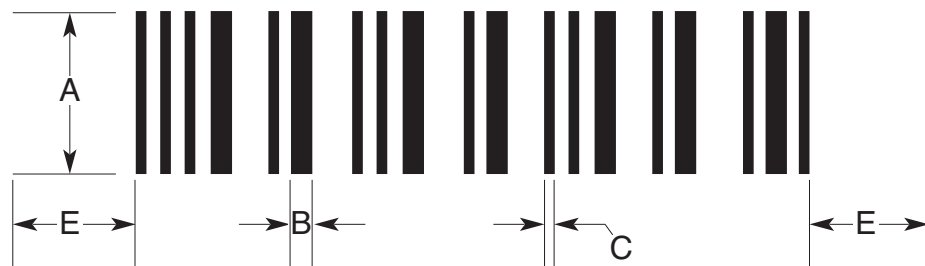
NYC-2	COR - Business Corporation Tax Return	307
NYC-245	OTH - Activities Report of Business and General Corporations	308
NYC-222	GCT - Underpayment of Estimated Tax by Corporations	309
NYC-9.7	GCT - UBT Paid Credit	310
NYC-4SEZ	GCT - Tax Return (EZ Form)	311
NYC-EXT	OTH - Application For Automatic 6-Month Extension for Time	312
NYC-EXT.1	OTH - Application For Additional Extension	313
NYC-2.5	COR - Computation of Receipts Factor	314
NYC-2.1	COR - Investment and Other Exempt Income and Investment Capital	315
NYC-2.4	COR - Net Operating Loss Deduction	316
NYC-2.2	COR - Subtraction Modification for Qualified Banks and Other Qualified Lenders	317
NYC-2.3	COR - Prior Net Operating Loss Conversion (PNOLC) Subtraction	318
NYC-2A	COR - Combined Business Corporation Tax Return	320
NYC-9.7C	COR - UBT Paid Credit - Business Tax Corporation	321
NYC-2.5A	COR - Computation of Receipts Factor - Combined	322
NYC-2.5A/BC	COR - Computation of Receipts Factor Detail Report - Combined	323
NYC-2A/BC	COR - Member's Detail Report - Combined	324
NYC-2S	COR - Business Corporation Tax Return - Short Form	326
NYC-300	COR - Mandatory First Installment by Business Corporations and C Corporations	327
NYC-HTX	HTX - Hotel Room Occupancy Tax	400
NYC-202	UBT - Tax Return Individuals and LLCs	602
NYC-202-EIN	UBT - Tax Return Estates & Trusts	603
NYC-204	UBT - Tax Return Partnerships	604
NYC-221	UBT - Underpayment of Estimated Unincorporated Business Tax	605
NYC-204EZ	UBT - Tax Return Partnerships	609
NYC-114.5	UBT - Reap Credit	610
NYC-114.7	UBT - Paid Credit	611
NYC-114.8	UBT - Reap Credit - Lower Manhattan	612
NYC-202S	UBT - Tax Return (Short Form)	614
NYC-114.12	UBT - Claim for Beer Production Credit	616
NYC-UXP	UTX - Utilities Tax Return	701
NYC-UXRB	UTX - Utilities Tax Return - Railroads, Buses	702
NYC-UXS	UTX - Return for Vendors of Utility Services	703
NYC-9.8UTX	UTX - Reap Credit UTX	704
NYC-1127	EMP - Non-Resident Employee Return	800
NYC-E-911	E911 - Return of E-911 Surcharge by Telecommunication Providers	900
NYC-200V	OTH - Payment Voucher for Returns and Extensions	SCANLINE

**B. Reproduction Requirements** - After NYC DOF official release of **final versions**, any of the NYC tax forms or schedules from the previous list may be reproduced so long as:

- The entry lines for data, along with the corresponding data labels, have the same horizontal and vertical coordinates as the final official version;
- The form is a reasonable reproduction; and
- All pertinent instructions are included once your product has received approval.

- C. Different Versions of Software** - If your software product is released for multiple platforms, the resulting forms must be identical. Examples of each version must be included and separately identified in the initial package of forms submitted. If forms are not identical, the vendor will be required to submit those forms using a separate vendor ID. (See “Form and Vendor Code Identification and Page Numbering”, page 5.)
- D. Horizontal and Vertical Lines** - All vertical lines from the forms, except cent lines, may be removed. Horizontal lines may not be removed. Barcodes must be reproduced on all applicable forms.
- E. Data Touching Characters** - Any variable taxpayer data must be placed so as to provide clear separation from any fixed line or other element, as visible with the unaided eye.
- F. Identifying Numbers** - All taxpayer and practitioner Employer Identification Numbers (EIN), Social Security Numbers (SSN), Practitioner’s Tax Identification Numbers (PTIN) and Federal Business Codes may be printed within boxes in a “comb” format or on a solid horizontal line.
- G. Cent Lines and Decimal Points** - The substitute form must contain either a cent line or a decimal point to separate the dollar and cents amounts. If only whole dollar amounts are printed, a decimal point or cent line must be included. Cent lines must be solid lines and not exceed 0.75-point size. All dollar fields must be right-justified.
- H. Commas as Separators** - If the software allows commas as separators, commas must be used in variable data on full field and test data samples. For example, use “98,765,432.12” instead of “98765432.12”. Mixing of comma formats on the same page is permitted if space is an issue.
- I. Negative numbers** - negative numbers must be portrayed with a minus sign - Do not use brackets or parentheses to portray negative numbers.
- J. Clear Space in Top Margin** - The margin at the top of the form between the edge of the paper and any fixed or variable text or graphics must be 0.375” or more. This clear space must exist from the left to the right edge of the paper.
- K. Blank fields** - Variable data fields must be left **blank** when there is no taxpayer entry. Do not use hard-coded decimal places in blank fields.
- L. Name and Address Format** - All vertical and horizontal lines in the entity name and address area must match the official form.
- M. Period After Field Identifier Label or Line Number** - All field labels or line numbers identifying variable data fields must be followed by a period or a vertical line to separate the line number from the variable data.
- N. Telephone Numbers** - Telephone numbers **MUST** be formatted with hyphens, as in the following format: 999-999-9999.

- O. Form and Vendor Code Identification and Page Numbering** - Form name, year and page number must appear on all form pages as it does on the official form. **The VENDOR ID CODE assigned by the Department of Finance must appear on the lower right corner of all substitute forms. (For vendor ID code placement on a NYC-200V voucher, see note on page 8).**
- P. Forms with Barcodes** - Forms that include a barcode must conform to the specifications listed here. The barcode is industry standard Code 3 of 9 (Code 39) (See the diagram below for measurements indicated by a letter in parentheses.)
- 1. Size** - The minimum barcode height (A) will be 0.375 inches or 25% of the barcode length, whichever is greater (see diagram below).
  - 2. Barcode Elements** - There are two bar sizes in the barcode, the narrow element (C) and the wide element (B). An element can be either a bar or a space. All wide elements within a barcode must be the same size; also, all narrow elements must be the same size.
    - The minimum narrow element width is 0.010 inches.
    - The maximum narrow element width is 0.066 inches.
    - The minimum wide element width is 0.022 inches.
    - The maximum wide element width is 0.200 inches.
    - The minimum wide element-to-narrow element ratio (D) is 2:1 if the narrow element width is greater than 0.020 inches.
    - The minimum wide element-to-narrow element ratio (D) is 2.2:1 if the narrow element width is less than or equal to 0.020 inches
    - The inter-character gap must be 1 to 3 times the minimum narrow element width.



**Note: This barcode is enlarged to show greater detail.**

- 3. Position** - Barcodes must appear in the exact location as on the NYC Department of Finance official forms. Barcodes in the top left corner of page 1 are positioned .5 inches or lower from the top edge to prevent staples from invalidating the barcode.

4. **Numbering Format** - The barcode format must be as follows:  
FFFSYYPP where:  
FFF = 3-digit form code from the section IV.A table  
S = page number (may be two digits, depending on form)  
YY = 2-digit tax year (as it appears on the official form)  
ID = 2-digit Vendor ID code (issued by NYC Department of Finance)
5. **Asterisks** - The barcode must have an asterisk as the first and last characters to indicate a start and stop.
6. **Printed Barcode Number** - The numerical translation of each barcode must appear in the bottom left corner of the barcoded page or as it appears on the official form.
7. **Clearances** - Barcodes must have the following clearances:
  - Top and bottom - 0.5 inches from top or bottom edge of form, which includes 0.25 inches clear space from any other element, and;
  - Side - 0.25 inches from the outside edge of the form.
8. **Barcode Evaluation/Grading** - Submitted barcodes must meet ANSI standard evaluation criteria to receive approval. Specifically, an ANSI defined grade of at least C must be achieved when scanned using charged-coupled device (CCD) technology.

**Q. Forms with Scanlines** - Reproduction of voucher Form NYC-200V *requires* to include a scanline generated using a **Modulus 10** algorithm and must conform to the specifications listed here.

The voucher will include the information as outlined in this section. Vendor reproductions must be the equivalent of the official version as shown in the sample on page 8.

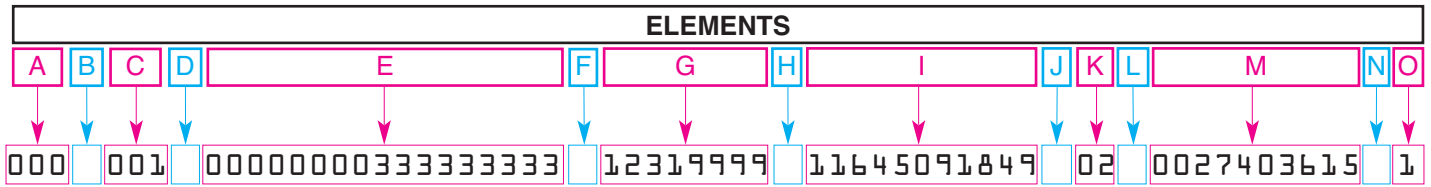
**Submission requirements for voucher Form NYC-200V differ from barcoded forms.**

Follow the instructions on page 11 or use the charts on page 13 for submission of your voucher sample.

**1. Scanline specifications**

- **Total amount of characters** - 55 - numerical
- **Typeface and size** - OCR-A Extended, 12 point
- **Position** - Across the bottom of the front page, centered.
- **Clearances** - .31" from the bottom edge of the page, .5" from any printed text.
- **Read direction** - the scanline will be read from left to right.
- **Weight Factor** - the weight factor used is **7532**.

Refer to the scanline sample and the chart below for the corresponding elements' descriptions and specifications



ELEMENTS' DESCRIPTIONS AND SPECIFICATIONS						
ELEMENT	LENGTH	START	END	DESCRIPTION	FORMAT	
A Account Type Code	3	1	3	Refer to <b>Account Type Codes</b> on page 8	Numeric, Right justified, zero fill	
B Filler	1	4	4	blank		
C Entity Identification	3	5	7	There are two types: <b>001 - EIN</b> ; <b>002 = SSN</b>	Numeric, Right justified, zero fill	
D Filler	1	8	8	blank		
E EIN or SSN	17	9	25	<b>Employer Identification Number or Social Security Number</b>	Numeric, Right justified, zero fill	
F Filler	1	26	26	blank		
G Filing Period End	8	27	34	Filing period corresponding to payment. If none, use 12319999.	Delineated as MMDDYYYY MM=month; DD=day; YYYY=year	
H Filler	1	35	35	blank		
I Media Number	11	36	46	BTS Provided media number for notices. Externally created vouchers use all 0's.	Numeric, Right justified, zero fill	
J Filler	1	47	47	blank		
K Voucher Type	2	48	49	Number representing the voucher type. Refer to voucher Types on page 9	Numeric, Right justified, zero fill	
L Filler	1	50	50	blank		
M Amount Due	10	51	60	Voucher Amount. This will be the expected value of the corresponding check. If a full payment isn't submitted the check will not match this amount.	Numeric, Right justify zero fill. The right 2 numbers are reserved for decimal places.	
N Filler	1	61	61	blank		
O Check Digit	1	62	62	Calculated Using A <b>Modulus 10 (Mod-10)</b> algorithm with a <b>weight factor of 7532</b> . See page 9 for a sample of check digit calculation.	Numeric, Right justified, zero fill	

**2. Account Type Codes (Tax Type) - 3 characters.** There are twelve account types:

- 010 = Banking Corporation Tax
- 040 = Commercial Rent Tax
- 200 = General Corporation Tax - **(Only to be used by S Corporations)**
- 215 = Hotel Room Occupancy Tax - Regular
- 300 = Non-Resident City Employees - Section 1127
- 320 = Unincorporated Business Tax - Individuals
- 330 = Unincorporated Business Tax - Partnerships
- 350 = Utility Tax - UXP
- 360 = Utility Tax - UXRБ
- 370 = Utility Tax - UXS
- 400 = Business Corporation Tax
- 911 = E-911 Surcharge

**3. Sample**

NYC 2-digit Vendor ID  
**NYC** Department of Finance **NYC-200V** **PAYMENT VOUCHER**

Business Name  
 Last Name, First Name  
 Street Address  
 City, State, Zip Code

EIN/SSN:  
 PERIOD BEGIN:  
 PERIOD END:

Form Number, ex.: NYC-3L

TAX TYPE FORM NAME

Account Type code (see above)

NYC DEPARTMENT OF FINANCE  
 P.O. BOX 3933  
 NEW YORK, NY 10008-3933

Payment Amount Enclosed

Make Remittance Payable to: NYC Department of Finance

000 001 000000003333333333 12319999 11645091849 02 0027403615 1

.31" .5"

Voucher sample is not to scale. Critical dimensions shown.

**NOTE: The VENDOR ID CODE assigned by the NYC Department of Finance must appear on the upper left corner, above the official logo, as shown in the preceding samples, on all vouchers with a SCANLINE. Submissions without the vendor ID code will be rejected.**



**R. Submission for Approval of barcoded forms** - The NYC Department of Finance requires validation of all barcoded substitute forms. Vendors may begin submissions as soon as official forms are made available. The following requirements must be observed:

- Form samples must be submitted in .pdf format via email
- Every email will have a limit of 10 sample .pdf submissions
- Each .pdf file must contain one blank, test data and full field sample of the form being submitted. For example: If 10 forms are submitted, submit 10 .pdf files. If 20 forms are submitted, send two emails containing 10.pdf files each.
- for submission of NYC-200V voucher samples, see item T, page 11.

A submission mailing chart with instructions is provided on page 13.

**1. Required samples** - For each scannable tax form being submitted for approval, the following must be submitted:

- **One blank sample** - blank form, including instructions, no data;
- **\*One test data sample** - sample with taxpayer test data. The data must be appropriate for the type of field; special characters are not allowed. (Examples of special characters are: `!@#^&*()?'~\;`) and,
- **\*One full field sample** - a form with data\* filling the maximum length of every field.

\*The numbers used in the test and full field samples must vary and should include unique values with some negative numbers. The test sample does not have to be mathematically correct but should closely mimic a typical tax return.

**Do not use** one repeating number such as 999,999,999.

**2. Approval Authority** - To request approval of substitute NYC barcoded forms, submit .pdf samples via email to:

**fuscoc@finance.nyc.gov**

**seth.pavlisak@exelaonline.com**

**benjamin.franks@exelaonline.com**

- S. Submission for Approval of forms WITHOUT a barcode** - Forms without barcodes are not required to be submitted for approval, provided all reproductions conform to the general requirements stated in this publication for all substitute forms and the official final version as to size of paper, size of type and image.

If approval of a form **without a barcode** is desired by the vendor, .pdf samples may be submitted **via email** to:

**fuscoc@finance.nyc.gov**

- Limit every email to 10 .pdf sample submissions.
- Each .pdf file must contain **one blank** and **one test data** sample of the form being submitted. If 10 forms are submitted, submit 10 .pdf files. If 20 forms are submitted, send two emails containing 10.pdf files each.  
See the submission mailing chart with instructions on page 13.

**Blank sample** = no data. Include instructions;

**Test data sample** = with taxpayer test data appropriate for the type of field; No special characters.

**NOTE:** Email non-barcode forms only to the email address listed above. The NYC Department of Finance may require vendors to submit additional samples should further testing be deemed necessary.

- T. Submission for Review and Approval of Form NYC-200V** - In order to have a substitute Form NYC-200V reviewed and considered for approval, the following samples must be submitted:

- **Two** mathematically correct test data samples. All data must correspond to the generated scanline on the samples with a calculated check digit using the formula on page 9.
- **NYC-200V samples may be submitted in either of two formats:**
  - **emailed .pdf samples to the email recipients below**
  - OR**
  - **mailed printed paper copies to the addresses below**

EMAIL .PDF SAMPLES TO:
<p><b>fuscoc@finance.nyc.gov</b></p> <p><b>and</b></p> <p><b>Sheree.Pitter@checkalt.com</b></p>

**OR**

MAIL PRINTED SAMPLES TO:
<p><b>CheckAlt</b>  <b>Attn.: Sheree Pitter, Lou Dileo</b>  <b>711 Executive Blvd Suite H</b>  <b>Valley Cottage, NY 10989</b></p> <p><b>and</b></p> <p><b>NYC Dept of Finance</b>  <b>Cono Fusco - Forms Development</b>  <b>One Centre Street, Room 2205</b>  <b>New York, NY 10007</b></p>

## **U. Limitations, Timeframes, Variances and Assistance**

- 1. Limitations of Approval** - The approval of any particular form means that the form will be accepted for processing but that any errors either on the substitute form or in the applicable software remain solely the responsibility of the company reproducing the form. The NYC Department of Finance reserves the right to correct the tax liability of any taxpayer where the error results from either an error on the substitute form or the software.
- 2. Timeframe for Review and Approval** - Review and validation may take up to ten business days from receipt of forms. Review results will be emailed.
- 3. Approval Period** - As soon as **finalized** forms are made available to vendors, substitute samples *may be submitted* for review/approval.
- 4. Request for Variances** - Any inquiries pertaining to any information included in this publication, i.e., Vendor ID number requests, all forms and instructions clarifications, approvals and permission for variances from all specifications outlined in this publication, must be directed to:

**[fuscoc@finance.nyc.gov](mailto:fuscoc@finance.nyc.gov)**

# HOW TO SUBMIT YOUR FORMS FOR VALIDATION AND APPROVAL

## FORMS WITH BARCODES - Must be submitted as follows:

### WHAT TO SUBMIT:

- One form per .pdf file (Ex.: if you are submitting 5 forms, submit 5 .pdf files)
- Every .pdf file must consist of one test data sample, one full field sample and one blank sample of the form you are submitting.
- Limit Ten forms per email (Ex.: if you are submitting 20 forms, send 2 emails with 10 forms each)

### HOW TO SUBMIT:

#### EMAIL .PDF FILES TO ALL THE FOLLOWING ADDRESSES:

**fuscoc@finance.nyc.gov**  
**seth.pavlisak@exelaonline.com**  
**benjamin.franks@exelaonline.com**

## FORMS WITHOUT BARCODES - Must be submitted as follows:

### WHAT TO SUBMIT:

- One form per .pdf file (Ex.: if you are submitting 5 forms, email 5 .pdf files)
- Every .pdf file must have one blank sample and one test data sample. (NO full field samples)
- Limit Ten forms per email (Ex.: if you are submitting 20 forms, send 2 emails with 10 forms each)

### HOW TO SUBMIT:

#### EMAIL .PDF FILES TO THE FOLLOWING ADDRESS:

**fuscoc@finance.nyc.gov**

## NYC-200V VOUCHER SCANLINE VALIDATION - Must be mailed AND emailed

### WHAT TO SUBMIT:

Two **.pdf samples** containing:

- Taxpayer test data\*
  - Generated scanline with calculated check digit.
- \*All data must correspond to calculated scanline using Modulus 10 algorithm and weight factor 7532.

OR

Two **printed samples** containing:

- Taxpayer test data\*
  - Generated scanline with calculated check digit.
- \*All data must correspond to calculated scanline using Modulus 10 algorithm and weight factor 7532.

### HOW TO SUBMIT:

#### EMAIL .PDF SAMPLES TO:

**fuscoc@finance.nyc.gov**

and

**Sheree.Pitter@checkalt.com**

OR

#### MAIL PRINTED SAMPLES TO:

**CheckAlt**  
**Attn.: Sheree Pitter, Lou Dileo**  
**711 Executive Blvd Suite H**  
**Valley Cottage, NY 10989**

and

**NYC Dept of Finance**  
**Cono Fusco - Forms Development**  
**One Centre Street, Room 2205**  
**New York, NY 10007**