

ST11-09 NJ Resident with NY Income

Need to Validate with TY2011 TW modules for NY and NJ
Add NY Unemployment handling
OUT OF SCOPE if NY 203 Line 74 answer is Yes?
Check handling of NY TR579
Check handling of NY 05.9 penalty situation

Out of Scope if:

Partial year NJ Resident
NY Income other than W-2

Sequence is Important !!

1) Main Info

a) State Information section – add NY in Nonresident box

2) All federal 1040 items

- a) For any W-2 (with NJ in box 15) – enter as usual
- b) For any W-2 (with NY in box 15)
 - i) Use separate line on W-2 worksheet for box 15-20 entries with NY in box 15
(1) i.e. – Do NOT enter NY amounts in NJ line – just leave blank
 - ii) See TW State Help for NY for special codes
(1) box 20, Local name (e.g. NYC, YONKERS, FORM1127)
(2) box 14, Other (e.g. 414HSUB, IRC125S)
- c) RES/NR Wkt will be Red – ok for now
- d) Run Diagnostics to check for federal problems

3) NY Return

- a) NY 203 Pg4, Line 74 Nonresidents – Answer No to “Did you or your spouse maintain living quarters in New York State in 2010?”
- b) NY 203 Pg4, Direct Deposit of Refund or Electronic Funds Withdrawal of Balance Due – Answer appropriately
- c) NY 05.9 Pg1 (Only if penalty for underpayment of NY Estimated Tax)
 - i) Handle Line 16 ala Fed 2210 or NJ 2210
- d) NY TR579 (only if e-filing NY)
 - i) Check box “I have read certification and agree...”
- e) If any NY forms Red, resolve or Out of Scope
- f) Run Diagnostics to check for NY problems

4) NJ Return – fill in as usual plus:

- a) NJ 1040, Line 40 (Credit for income taxes paid to other jurisdictions)
 - i) Jurisdiction code is 32 for NY
 - ii) Link to NJ Sch A
- b) NJ Sch A
 - i) Line 1 – Name: NY State; Amount: NY Wages from W-2(s)
 - ii) Line 9a – NY tax liability per NY 203 Pg4, Line 59 (Total NY State, ...)

5) RES/NR Wkt

a) Look over to make no surprises, then check Red box at top of form

6) Run Diagnostics to check for Fed / NY / NJ problems

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OK to file Federal, NJ, and NY electronically

If e-filing NY, then attach NY signed TR-579-IT to 8879 (same signatures as 8879 – one copy for IRS / one copy for TP)

DRAFT