OFX Tax Specification Addendum

OFX Tax Data Structures

Version 2026.1

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1. Tax Forms

1.1. Tax1041K1_V100

Form 1041 Schedule K-1 - Shareholder's Share of Income, Deductions, Credits, etc.

Tag	Description	Type
SRVRTID	ID assigned by server to document	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
FINALK1	Final K-1	BooleanType
AMENDEDK1	Amended K-1	BooleanType
ESTATETRUSTNAME	Name of Estate/Trust	GenericNameType
ESTATETRUSTEIN	Estate or trust employer identification number	GenericNameType
FIDUCIARYINFO	Fiduciary's name and address	anonymous
WASFILEDFORM1041T	Was Form 1041-T filed?	BooleanType
DATEFILEDFORM1041T	Date the Form 1041-T was filed	DateTimeType
ISFINAL1041T	Is this the final Form 1041 for the estate or trust?	BooleanType
BENEFICIARYID	Beneficiary's identifying number	GenericNameType
BENEFICIARYINFO	Beneficiary's name and address	anonymous
DOMESTICBENEFICIARY	Box H, Domestic beneficiary	BooleanType
FOREIGNBENEFICIARY	Box H, Foreign beneficiary	BooleanType
INTERESTINCOME	Box 1, Interest income	AmountType
ORDINARYDIVIDEND	Box 2a, Ordinary dividends	AmountType
QUALIFIEDDIVIDEND	Box 2b, Qualified dividends	AmountType
NETSTCAPITALGAIN	Box 3, Net short-term capital gain	AmountType

Tag	Description	Type
NETLTCAPITALGAIN	Box 4a, Net long-term capital gain	AmountType
RATEGAIN28	Box 4b, 28% rate gain	AmountType
UNRECAP1250GAIN	Box 4c, Unrecaptured section 1250 gain	AmountType
OTHERPORTFOLIOINCOME	Box 5, Other portfolio and nonbusiness income	AmountType
ORDINARYBUSINESSINC	Box 6, Ordinary business income	AmountType
NETRENTALREINCOME	Box 7, Net rental real estate income	AmountType
OTHERRENTALINCOME	Box 8, Other rental income	AmountType
APPORTIONDEDUCTIONS+	Box 9, Directly apportioned deductions	CodeAmountType
ESTATETAXDEDUCTION	Box 10, Estate tax deduction	AmountType
FINALYRDEDUCTIONS+	Box 11, Final year deductions	CodeAmountType
AMTITEMS+	Box 12, Alternative minimum tax adjustments	CodeAmountType
CREDITS+	Box 13, Credits	CodeAmountType
OTHERINFO+	Box 14, Other information	CodeAmountType
FISCALYEARBEGIN	Fiscal year beginning	DateTimeType
FISCALYEAREND	Fiscal year ending	DateTimeType

1.2. Tax1065K1_V100

Form 1065 Schedule K-1

Tag	Description	Type
SRVRTID	ID assigned by server to document	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType

Tag	Description	Type
CORRECTED	Corrected document	BooleanType
FINALK1	Final K-1	BooleanType
AMENDEDK1	Amended K-1	BooleanType
PARTNERSHIPNAME	Name of Partnership	GenericNameType
PARTNERSHIPEIN	Partnership's employer identification number	GenericNameType
PARTNERSHIPADDRESS	Partnership's address; Schedule K-1 Part I Line B	anonymous
IRSCENTER	IRS center where partnership filed return	GenericNameType
PUBLICLYTRADEDPARTNERSHIP	Publicly traded partnership	BooleanType
PARTNERID	Partner's SSN or TIN	GenericNameType
PARTNERINFO	Partner's name and address	anonymous
GENERALPARTNER	General partner or LLC member-manager	BooleanType
LIMITEDPARTNER	Limited partner or other LLC member	BooleanType
DOMESTICPARTNER	Domestic partner	BooleanType
FOREIGNPARTNER	Foreign partner	BooleanType
DISREGARDEDENTITY	Box H2, Check if the partner is a disregarded entity (DE), and enter the partner's TIN and Name. TY19.	BooleanType
DISREGARDEDENTITYTIN	Box H2, Disregarded entity partner's TIN. TY19.	GenericNameType
DISREGARDEDENTITYNAME	Box H2, Disregarded entity partner's Name. TY19.	GenericNameType
PARTNERENTITYTYPE	Box I1, Type of entity	GenericNameType
PARTNERISRETIREMENTPLAN	Is the partner a retirement plan (IRA/SEP/Keogh/etc.)	BooleanType

Tag	Description	Type
PARTNERSSHAREPROFITLOSSCAPITAL	Partner's share of profit, loss, and capital	anonymous
PARTNERSHARELIAB	Partner's share of liabilities	anonymous
PARTNERSCAPITALACCT	Partner's capital account analysis	anonymous
PARTNERCONTRIBPROP	Did the partner contribute property with a built-in gain or loss?	BooleanType
UNRECOGNIZEDSECTION704BEGIN	Box N, Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss) - beginning. TY19.	AmountType
UNRECOGNIZEDSECTION704END	Box N, Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss) - ending. TY19.	AmountType
ORDINARYINCOME	Box 1, Ordinary income	AmountType
NETRENTALREINCOME	Box 2, Net rental real estate income	AmountType
OTHERRENTALINCOME	Box 3, Other net rental income	AmountType
GUARANTEEDPAYMENTSERVICES	Box 4a, Guaranteed payments for services. TY19.	AmountType
GUARANTEEDPAYMENTCAPITAL	Box 4b, Guaranteed payments for capital. TY19.	AmountType
GUARANTEDPAYMENT	Box 4c, Total guaranteed payments.	AmountType
INTEREST	Box 5, Interest income	AmountType
ORDINARYDIVIDEND	Box 6a, Ordinary dividends	AmountType
QUALIFIEDDIVIDEND	Box 6b, Qualified dividends	AmountType
ROYALTIES	Box 7, Royalties	AmountType
NETSTCAPITALGAIN	Box 8, Net short-term capital gain	AmountType
NETLTCAPITALGAIN	Box 9a, Net long-term capital	AmountType

Tag	Description	Type
	gain	
COLLECTIBLES	Box 9b, Collectibles (28%) gain	AmountType
UNRECAPSEC1250GAIN	Box 9c, Unrecaptured section 1250 gain	AmountType
NETSEC1231GAIN	Box 10, Net section 1231 gain	AmountType
OTHERINCOMELOSS+	Box 11, Other income or loss	CodeAmountType
SEC179DEDUCT	Box 12, Section 179 deduction	AmountType
OTHERDEDUCTIONS+	Box 13, Other deductions	CodeAmountType
SELFEMPLOY+	Box 14, Self-employment earnings	CodeAmountType
CREDITS+	Box 15, Credits	CodeAmountType
FOREIGNCOUNTRY	Foreign country. Obsolete.	GenericNameType
FOREIGNTRANSACTIONS+	Foreign transactions. Obsolete.	CodeAmountType
AMTITEMS+	Box 17, Alternative minimum tax items	CodeAmountType
TAXEXEMPT+	Box 18, Tax-exempt income and nondeductible expenses	CodeAmountType
DISTRIBUTIONS+	Box 19, Distributions	CodeAmountType
OTHERINFO+	Box 20, Other information	CodeAmountType
DIVIDENDEQUIVALENTS	Box 6c, Dividend equivalents	AmountType
FISCALYEARBEGIN	Fiscal year begin	DateTimeType
FISCALYEAREND	Fiscal year end	DateTimeType
MULTIPLEATRISKACTIVITIES	Box 22, More than one activity for at-risk purposes.	BooleanType
MULTIPLEPASSIVEACTIVITIES	Box 23, More than one activity for passive activity purposes.	BooleanType

1.3. Tax1095A_V100

Form 1095-A - Health Insurance Marketplace Statement

Tag	Description	Type
SRVRTID	ID of document assigned by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Whether voided tax document	BooleanType
CORRECTED	Whether corrected tax document	BooleanType
MARKETPLACEIDENTIFIER	Marketplace identifier	GenericNameType
MARKETASSIGNEDPOLICYNUM	Marketplace assigned policy number	GenericNameType
POLICYISSUERNAME	Name of the exchange providing the 1095-A	GenericNameType
RECIPIENTINFO	Recipient and Recipient Spouse(if applicable) info	RecipientInfo
POLICYSTARTDATE	Date policy coverage began	DateTimeType
POLICYTERMINATIONDATE	Date policy coverage ended	DateTimeType
COVERAGEHOUSEHOLD+	Covered Individual Information Group	CoverageHouseholdType
HOUSEHOLDINFO	Monthly premium amounts	HouseholdInformationType
TOTALPLANPREMIUMAMT	Total Monthly Premium Amount	AmountType
TOTALPREMIUMSLCSPAMT	Total monthly SLCSP Amount	AmountType
TOTALADVANCEPTCAMT	Total Monthly Advanced PTC Amount	AmountType

1.4. Tax1095B_V100

Form 1095-B - Health Coverage

Tag	Description	Type
SRVRTID	ID of document assigned by server	ServerIdType
TAXYEAR	Tax year	YearType

Tag	Description	Type
VOID	Whether voided tax document	BooleanType
CORRECTED	Whether corrected tax document	BooleanType
RESPONSIBLEINDIV	The name of the responsible individual on the health plan	anonymous
ORIGINOFPOLICYCD	Origin of Policy code from instructions. One of the following: A,B,C,D,E,F	anonymous
SHOPIDENTIFIER	The ID of the Small Business Health Options Program (SHOP). If applicable.	GenericNameType
EMPLOYERSPONSORED	Present if Insurance company provides employer-sponsored health coverage. Will be blank if NOT insured employer covereage.	Employer
ISSUERORPROVIDER	Provider Information	Employer
CONTACTPERSONPHONE	Contact phone number for the Coverage Provider who can answer questions regarding the form.	PhoneType
COVEREDINDIVIDUAL+	Covered individual info	CoveredIndivGrpType

1.5. Tax1095C_V100

Form 1095-C - Employer-Provided Health Insurance Offer and Coverage

Tag	Description	Type
SRVRTID	ID of document assigned by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Whether voided tax document	BooleanType
CORRECTED	Whether corrected tax document	BooleanType

Tag	Description	Type
ALECONTACTPHONE	Applicable Large Employer (ALE) Contact telephone number	PhoneType
EMPLOYER	Employer information	Employer
EMPLOYEEINFO	Employee information	EmployeeInfo
EMPLOYEEAGE	Employee's Age on January 1. New TY20.	AgeType
PLANSTARTMONTH	Enter the 2 digit month 01-12. Optional for TY15.	anonymous
ANNUALCOVERAGE	Use if Covered for ALL 12 Months	anonymous
MONTHLYCOVERAGE+	Use if NOT covered for ALL 12 months	PartIIGrpType
SELFINSURED	Checked if employer provided self-insured coverage	BooleanType
COVEREDINDIVIDUAL+	Covered individual(s)	CoveredIndivGrpType

1.6. Tax1097BTC_V100

Form 1097-BTC - Bond Tax Credit

Tag	Description	Type
SRVRTID	ID of document assigned by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	This tax document was voided	BooleanType
CORRECTED	This tax document is a correction	BooleanType
ISSUERADDR	Issuer name and address	Issuer1097AddressType
RECIPADDR	Recipient name and address	Recipient1097AddressType
ISSUERID	FORM 1097-BTC ISSUER'S federal identification number	GenericNameType
RECIPID	RECIPIENT'S federal	IdType

Tag	Description	Type
	identification number	
BYISSUER	Form 1097-BTC issuer is: Issuer of bond or its agent filing 2017 Form 1097-BTC for credit being reported	BooleanType
BYNOMINEE	Form 1097-BTC issuer is: An entity or a person that received or should have received a 2017 Form 1097-BTC and is distributing part or all of that credit to others	BooleanType
TOTAL	Box 1. Total	AmountType
BONDCODE	Box 2a. Code	GenericNameType
UNIQUEID	Box 2b. Unique Identifier	GenericNameType
BONDTYPE	Box 3. Bond type	GenericNameType
JAN	Box 5a. January	AmountType
FEB	Box 5b. February	AmountType
MAR	Box 5c. March	AmountType
APR	Box 5d. April	AmountType
MAY	Box 5e. May	AmountType
JUN	Box 5f. June	AmountType
JUL	Box 5g. July	AmountType
AUG	Box 5h. August	AmountType
SEP	Box 5i. September	AmountType
OCT	Box 5j. October	AmountType
NOV	Box 5k. November	AmountType
DEC	Box 5l. December	AmountType
COMMENTS	Box 6. Comments	MessageType

1.7. Tax1098C_V100

Form 1098-C - Contributions of Motor Vehicles, Boats, and Airplanes

Tag	Description	Type
DONEEADDR	Donee name and address	DoneeAddressType
DONORADDR	Donor name and address	DonorAddressType
CORRECTED	CORRECTED (if checked)	BooleanType
DONEEID	DONEE'S federal identification number	GenericNameType
DONORID	DONOR'S identification number	IdType
DATECONTRIB	Box 1. Date of contribution	DateTimeType
ODOMETER	Box 2a. Odometer mileage	GenericNameType
CARYEAR	Box 2b. Year	YearType
MAKE	Box 2c. Make	GenericNameType
MODEL	Box 2d. Model	GenericNameType
VIN	Box 3. Vehicle or other identification number	GenericNameType
ARMSLENGTH	Box 4a. Donee certifies that vehicle was sold in arm's length transaction to unrelated party	BooleanType
DATESALE	Box 4b. Date of sale	DateTimeType
PROCEEDS	Box 4c. Gross proceeds from sale (see instructions)	AmountType
NOTTRANSFERRED	Box 5a. Donee certifies that vehicle will not be transferred for money, other property, or services before completion of material improvements or significant intervening use	BooleanType
NEEDY	Box 5b. Donee certifies that vehicle is to be transferred to a	BooleanType

Tag	Description	Type
	needy individual for significantly below fair market value in furtherance of donee's charitable purpose	
DESCIMPROVE	Box 5c. Donee certifies the following detailed description of material improvements or significant intervening use and duration of use	MessageType
EXCHANGE	Box 6a. Did you provide goods or services in exchange for the vehicle? Yes	BooleanType
EXCHANGEVALUE	Box 6b. Value of goods and services provided in exchange for the vehicle	AmountType
RELIGIOUS	Box 6c. If this box is checked, donee certifies that the goods and services consisted solely of intangible religious benefits	BooleanType
DESCGOODS	Box 6c. Describe the goods and services, if any, that were provided.	MessageType
DONATIONMAX	Box 7. Under the law, the donor may not claim a deduction of more than $500 for this vehicle if this box is checked	BooleanType
SRVRTID	ID of document assigned by server	ServerIdType
TAXYEAR	Tax year	YearType

1.8. Tax1098E_V100

Form 1098-E - Student Loan Interest Statement

Tag	Description	Type
SRVRTID	ID of document assigned by	ServerIdType

Tag	Description	Type
	server	
TAXYEAR	Tax year	YearType
LENDERADDR	Lender's name and address	LenderAddress
LENDERID	Lender's TIN	GenericNameType
BORROWERID	Borrower's TIN	GenericNameType
BORROWERADDR	Borrower's name and address	BorrowerAddress
STUDENTLOANINTEREST	Box 1. Student loan interest	AmountType
LOANPRIORSEP2004ANDNOLOF	Box 2. Box 1 does not include loan origination fees for loans made before September 1, 2004.	BooleanType
ACCOUNTNUMBER	Account number	GenericDescriptionType

1.9. Tax1098T_V100

Form 1098-T - Tuition Statement

Tag	Description	Type
SRVRTID	ID of document assigned by server	ServerIdType
TAXYEAR	Tax year	YearType
FILERID	Filer's employer identification no.	GenericNameType
STUDENTSOCSECNO	Student's TIN	GenericNameType
ACCOUNTNUMBER	Account number	GenericDescriptionType
FILERADDR	Filer's address	FilerAddress
STUDENTADDR	Student's address	StudentAddress
QUALIFIEDTUITION	Box 1. Payments received for qualified tuition and related expenses	AmountType
BILLEDEXPENSE	Box 2. Discontinued.	AmountType
CHANGEMETHOD	Obsolete, removed by IRS for	BooleanType

Tag	Description	Type
	TY19.	
ADJPRIORYEAR	Box 4. Adjustments made for prior year	AmountType
SCHOLARSHIPS	Box 5. Scholarships or grants	AmountType
ADJSCHOLARSHIP	Box 6. Adjustments to scholarships or grants for a prior year	AmountType
INCLUDEJANMARCH	Box 7. Checked if the amount in box 1 includes amounts for an academic period beginning January - March	BooleanType
HALFTIME	Box 8. Checked if at least half-time student	BooleanType
GRADUATE	Box 9. Checked if graduate student	BooleanType
INSURREIMB	Box 10. Insurance contract reimbursement/refund	AmountType

1.10. Tax1098VLI_V100

Form 1098-VLI Vehicle Loan Interest Statement

Tag	Description	Type
SRVRTID	ID of document assigned by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
VEHICLELOANINT	Box 1. Vehicle loan interest received by lender	AmountType
VEHICLEYEAR	Box 2a. Year	YearType
VEHICLEMAKE	Box 2b. Make	GenericDescriptionType
VEHICLEMODEL	Box 2c. Model	GenericDescriptionType

Tag	Description	Type
VIN	Box 2d. VIN	GenericDescriptionType
LOANORIGINATIONDATE	Box 3a. Loan origination date	DateTimeType
LOANACQUISITIONDATE	Box 3b. Loan acquisition date	DateTimeType
OUTSTANDINGPRINCIPAL	Box 4. Outstanding principal	AmountType
OVERPAIDREFUND	Box 5. Refund of overpaid interest	AmountType
ORIGINALUSER	Box 6. Check if original use of the vehicle began with the payer of record	BooleanType
ASSEMBLEDINUSA	Box 7. Check if final assembly of the vehicle occurred within the United States	BooleanType
LENDERADDR	Recipient's/Lender's address	LenderAddress
LENDERID	Recipient's/Lender's TIN	GenericDescriptionType
BORROWERADDR	Payer's/Borrower's address	BorrowerAddress
BORROWERID	Payer of record's TIN	GenericDescriptionType
ACCOUNTNUMBER	Account number	GenericDescriptionType

1.11. Tax1098_V100

Form 1098 - Mortgage Interest Statement

Tag	Description	Type
SRVRTID	ID of document assigned by server	ServerIdType
TAXYEAR	Tax year	YearType
MORTGAGEINTEREST	Box 1. Mortgage interest received from payer(s)/borrower(s)	AmountType
OUTSTANDINGPRINCIPAL	Box 2. Outstanding mortgage principal	AmountType
ORIGINATIONDATE	Box 3. Mortgage origination date	DateTimeType

Tag	Description	Type
POINTS	Box 6. Points paid on purchase of principal residence	AmountType
OVERPAIDREFUND	Box 4. Refund of overpaid interest	AmountType
MORTGAGEINSPREM	Box 5. Mortgage insurance premiums	AmountType
PROPERTYTAX	Property tax	AmountType
OTHERLOANINFO	Box 10. Other	GenericDescriptionType
PROPADDRSAMEASBORROWER	Box 7. Address of property securing mortgage is the same as borrower's address.	BooleanType
PROPADDRESS	Box 8. Address of property securing mortgage	anonymous
PROPDESCRIPTION	Box 8. Description of property securing mortgage	MessageType
LENDERADDR	Lender's name and address	LenderAddress
LENDERID	Lender's TIN	GenericDescriptionType
BORROWERADDR	Borrower's name and address	BorrowerAddress
BORROWERID	Borrower's TIN	GenericDescriptionType
ACCOUNTNUMBER	Account number	GenericDescriptionType
NUMMORTGAGEDPROP	Box 9. Number of properties securing the mortgage. New TY17	anonymous
DATEACQ	Box 11. Mortgage acquisition date. New TY19.	DateTimeType

1.12. Tax1099A_V100

Form 1099-A - Acquisition or Abandonment of Secured Property

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType

Tag	Description	Type
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
LENDERADDRESS	Lender's name and address	LenderAddressType
BORROWERADDRESS	Borrower's name and address	BorrowerAddressType
LENDERID	LENDER’S federal identification number	GenericNameType
BORROWERID	BORROWER’S identification number	IdType
ACCTNUM	Account number	GenericNameType
DATEACQ	Box 1. Date of lender's acquisition or knowledge of abandonment	DateTimeType
BALANCE	Box 2. Balance of principal outstanding	AmountType
FMV	Box 4. Fair market value property	AmountType
PERSLIAB	Box 5. If checked, the borrower was personally liable for repayment of the debt	BooleanType
DESCPROP	Box 6. Description of property	MessageType

1.13. Tax1099B_V100

Form 1099-B - Proceeds From Broker and Barter Exchange Transactions

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType

Tag	Description	Type
DTSALE	Deprecated in TY21	DateTimeType
CUSIPNUM	Moved to ProceedDescription_V100 in TY2025	CusipType
STKBND	Deprecated in TY21	StocksBonds
BARTERING	Box 13. Bartering	AmountType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
DSCR	Deprecated in TY21	ShortMessageType
PROFIT	Box 8. Profit or (loss) realized on closed contracts	AmountType
UNRELPROFITPREV	Box 9. Unrealized profit or (loss) on open contracts, end of prior year	AmountType
UNRELPROFIT	Box 10. Unrealized profit or (loss) on open contracts	AmountType
AGGPROFIT	Box 11. Aggregate profit or (loss) on contracts	AmountType
EXTDBINFO_V100	Additional 1099-B information	ExtendedBInfo_V100
PAYERADDR	Payer name and address	PayerAddress
PAYERID	Payer tax identification number	GenericNameType
RECADDR	Recipient name and address	RecipientAddress
RECID	Recipient tax identification number	TaxIdType
RECACCT	Account number	GenericNameType
TINNOT	Second TIN notice	BooleanType

1.14. Tax1099CAP_V100

Form 1099-CAP - Changes in Corporate Control and Capital Structure

Tag	Description	Type

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
SHAREHOLDERADDR	Shareholder name and address	ShareholderAddressType
CORPORATIONADDR	Corporation name and address	CorporationAddressType
CORPORATIONID	CORPORATION'S federal identification no.	GenericNameType
SHAREHOLDERID	SHAREHOLDER'S identification no.	IdType
ACCTNUM	Account number	GenericNameType
DATESALE	Box 1. Date of sale or exchange	DateTimeType
AGGRAMOUNT	Box 2. Aggregate amount received	AmountType
NUMSHARES	Box 3. Number of shares exchanged	AmountType
CLASSSTOCK	Box 4. Classes of stock exchanged	GenericNameType

1.15. Tax1099C_V100

Form 1099-C - Cancellation of Debt

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
CREDITORADDR	Creditor name and address	CreditorAddressType

Tag	Description	Type
DEBTORADDR	Debtor name and address	DebtorAddressType
CREDITORID	CREDITOR'S federal identification number	GenericNameType
DEBTORID	DEBTOR'S identification number	IdType
ACCTNUM	Account number	GenericNameType
DATEEVENT	Box 1. Date of identifiable event	DateTimeType
DEBTDISCHARGED	Box 2. Amount of debt discharged	AmountType
INTERESTINCL	Box 3. Interest if included in box 2	AmountType
DEBTDESC	Box 4. Debt description	MessageType
PERSLIAB	Box 5. If checked, the debtor was personally liable for repayment of the debt	BooleanType
DEBTCODE	Box 6. Identifiable debt code	GenericNameType
FMVPROP	Box 7. Fair market value of property	AmountType

1.16. Tax1099DA_V100

Form 1099-DA - Digital Asset Proceeds From Broker Transactions

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
EXTDDAINFO_V100	Detailed 1099-DA information	ExtendedDAInfo_V100
PAYERADDR	Payer name and address	PayerAddress

Tag	Description	Type
PAYERID	Payer taxpayer identification number	GenericNameType
RECADDR	Recipient name and address	RecipientAddress
RECID	Recipient taxpayer identification number	TaxIdType
RECACCT	Account number	GenericNameType
TINNOT	Second TIN notice	BooleanType
SECONDTINNOTICE	Second TIN notice	BooleanType
TOTALFEDTAXWITHHELD	Federal income tax withheld	AmountType
TOTALSTATETAXWITHHELD	State income tax withheld	AmountType
TOTALLOCALTAXWITHHELD	Local income tax withheld	AmountType

1.17. Tax1099DIV_V100

Form 1099-DIV - Dividends and Distributions

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
ORDDIV	Box 1a. Total ordinary dividends	AmountType
QUALIFIEDDIV	Box 1b. Qualified dividends	AmountType
DIVNOTMEETAMT	Portion of the qualified dividend amount that did not meet holding period requirements. New for TY2026	AmountType
DIVFROMGOVINT+	U.S Government interest Aggregate. New for TY2026	DivFromGovIntAggregate
TOTCAPGAIN	Box 2a. Total capital gain	AmountType

Tag	Description	Type
	distributions	
POSTMAY5CAPGAIN	OBSOLETE	AmountType
P28GAIN	Box 2d. Collectibles (28%) gain	AmountType
UNRECSEC1250	Box 2b. Unrecaptured Sec. 1250 gain	AmountType
SEC1202	Box 2c. Section 1202 gain	AmountType
QUAL5YEAR	OBSOLETE	AmountType
NONTAXDIST	Box 3. Nondividend distributions	AmountType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
SEC199A	Box 5. Section 199A dividends. New TY18	AmountType
INVESTEXP	Box 6. Investment expenses	AmountType
FORTAXPD	Box 7. Foreign tax paid	AmountType
FORINCOMEAMT	Foreign income amount. New TY18	AmountType
FORINCOMEAMTAGG	Foreign source income breakdown aggregate. New for TY2026	ForeignIncomeAmtAggregate
FORCNT	Foreign country	GenericNameType
FORINCOME+	Foreign income information. New TY18	ForeignIncomeAggregate
CASHLIQ	Box 9. Cash liquidation distributions	AmountType
NONCASHLIQ	Box 10. Noncash liquidation distributions	AmountType
EXEMPTINTDIV	Box 12. Exempt-interest dividends	AmountType
TAXEXEMPTINCOMESTATEALLOCATION+	Aggregate for tax-exempt interest dividends state breakdown information. New	TaxExemptIncomeStateAllocation

Tag	Description	Type
	for TY2026	
ORIGSTATE+	New TY18	OriginatingStateAggregate
SPECIFIEDPABINTDIV	Box 13. Specified private activity bond interest dividends	AmountType
SEC897DIV	Box 2e. Section 897 ordinary dividends. New TY21	AmountType
SEC897GAIN	Box 2f. Section 897 capital gain. New TY21	AmountType
STATECODE	2 DIGIT STATE CODE	StateCodeType
STATEIDNUM	PAYER STATE ID NUMBER	IdType
STATETAXWHELD	State income tax withheld	AmountType
ADDLSTATETAXWHAGG+	State tax withholding details	AddlStateTaxWheldAggregate
PAYERADDR	Payer name and address	PayerAddress
PAYERID	Payer tax identification number	GenericNameType
RECADDR	Recipient name and address	RecipientAddress
RECID	Recipient tax identification number	IdType
RECACCT	Account number	GenericNameType
TINNOT	Second TIN notice	BooleanType
FATCA	FATCA filing requirement	BooleanType

1.18. Tax1099G_V100

Form 1099-G - Certain Government Payments

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType

Tag	Description	Type
PAYERADDR	Payer name and address	PayerAddressType
RECIPADDR	Recipient name and address	RecipientAddressType
ADDLSTATETAXWHAGG+	State tax withholding information	AddlStateTaxWheldAggregateType
PAYERID	PAYER'S federal identification number	GenericNameType
RECID	RECIPIENT'S identification number	IdType
ACCTNUM	Account number	GenericNameType
UNEMP	Box 1. Unemployment compensation	AmountType
STREFUND	Box 2. State or local income tax refunds, credits, or offsets	AmountType
REFUNDYEAR	Box 3. Box 2 amount is for tax year	YearType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
RTAA	Box 5. RTAA payments	AmountType
GRANTS	Box 6. Taxable grants	AmountType
AGRPMTS	Box 7. Agriculture payments	AmountType
BUSINESSINCOME	Box 8. If checked, box 2 is trade or business income	BooleanType
MKTGAIN	Box 9. Market gain	AmountType
FAMILYLEAVE	Box 10. Family leave benefits	AmountType

1.19. Tax1099H_V100

Form 1099-H - Health Coverage Tax Credit (HCTC) Advance Payments

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType

Tag	Description	Type
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
ISSUERADDR	Issuer name and addresss	IssuerAddressType
RECIPADDR	Recipient name and address	RecipientAddressType
ISSUERID	ISSUER'S/PROVIDER'S federal identification number	GenericNameType
RECID	RECIPIENT'S identification number	IdType
ADVANCE	Box 1. Amount of HCTC advance payments	AmountType
NUMMONTHS	Box 2. Number of months HCTC advance payments and reimbursement credits paid to you	MonthType
JAN	Box 3. January	AmountType
FEB	Box 4. February	AmountType
MAR	Box 5. March	AmountType
APR	Box 6. April	AmountType
MAY	Box 7. May	AmountType
JUN	Box 8. June	AmountType
JUL	Box 9. July	AmountType
AUG	Box 10. August	AmountType
SEP	Box 11. September	AmountType
OCT	Box 12. October	AmountType
NOV	Box 13. November	AmountType
DEC	Box 14. December	AmountType

1.20. Tax1099INT_V100

Form 1099-INT - Interest Income

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
PAYERRTN	Payer's routing transit number	GenericNameType
INTINCOME	Box 1. Interest income	AmountType
NOMINEEINTADJ	Amount for nominee interest adjustment. New for TY2026	AmountType
OIDINTADJ	Amount for original issue discount (OID) interest adjustment. New for TY2026	AmountType
BONDEXEMPTINTADJ	Amount for Bond premium on tax-exempt interest adjustment. New for TY2026	AmountType
TREASURYINTADJ	Amount for Bond premium on treasury obligation interest adjustment. New for TY2026	AmountType
AMORTINTADJ	Amount for amortizable bond premium interest adjustment. New for TY2026	AmountType
ACCRUEDINTADJ	Amount for accrued interest adjustment. New for TY2026	AmountType
USSAVINGSBONDINTADJ	Amount for US savings bond interest adjustment. New for TY2026	AmountType
AMTINTADJ	Amount for Alternative Minimum Tax interest adjustment. New for TY2026	AmountType

Tag	Description	Type
OTHERINTADJ	Amount for OTHER interest adjustment. New for TY2026	AmountType
ERLWITHPEN	Box 2. Early withdrawal penalty	AmountType
INTUSBNDTRS	Box 3. Interest on U.S. Savings Bonds and Treasury obligations	AmountType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
INVESTEXP	Box 5. Investment expenses	AmountType
FORTAXPD	Box 6. Foreign tax paid	AmountType
FORINCOMEAMT	Foreign income amount. New TY18	AmountType
FORCNT	Foreign country	GenericNameType
FORINCOME+	Foreign income from this country. New TY18	ForeignIncomeAggregate
TAXEXEMPTINT	Box 8. Tax-exempt interest	AmountType
ORIGSTATE+	Tax-exempt interest by-state information. New TY18	OriginatingStateAggregate
SPECIFIEDPABINT	Box 9. Specified private activity bond interest	AmountType
MARKETDISCOUNT	Box 10. Market discount. NEW for TY14	AmountType
BONDPREMIUM	Box 11. Bond premium. NEW for TY14	AmountType
BONDPREMUSOBLIGATIONS	Box 12. Bond premium on Treasury obligations	AmountType
TEBONDPREMIUM	Box 13. Bond premium on tax-exempt bond. NEW for TY15	AmountType
CUSIPNUM	Box 14. Tax-exempt and tax credit bond CUSIP number	CusipType
STATECODE	2 DIGIT STATE CODE	StateCodeType

Tag	Description	Type
STATEIDNUM	PAYER STATE ID NUMBER	IdType
STATETAXWHELD	State tax withheld	AmountType
ADDLSTATETAXWHAGG+	State income tax withholding information	AddlStateTaxWheldAggregate
PAYERADDR	Payer name and address	PayerAddress
PAYERID	Payer tax identification number	GenericNameType
RECADDR	Recipient name and address	RecipientAddress
RECID	Recipient tax identification number	IdType
RECACCT	Account number	GenericNameType
TINNOT	Second TIN notice	BooleanType
FATCA	FATCA filing requirement	BooleanType

1.21. Tax1099K_V100

Form 1099-K - Merchant Card and Third-Party Network Payments

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
PAYEEADDR	Payer name and address	PayeeAddressType
FILERADDR	Filer name and address	FilerAddressType
ADDLSTATETAXWHAGG+	State tax withholding information	AddlStateTaxWheldAggregate Type
PSE	Check to indicate if FILER is a (an): Payment settlement entity (PSE)	BooleanType
EPF	Check to indicate if FILER is a (an): Electronic payment	BooleanType

Tag	Description	Type
	facilitator (EPF)/Other third party	
PAYCARD	Check to indicate transactions reported are: Payment card	BooleanType
THIRDNET	Check to indicate transactions reported are: Third party network	BooleanType
ACCTNUM	Account number	GenericNameType
FILERID	FILER’S federal identification no.	GenericNameType
PAYEEID	PAYEE’S taxpayer identification no.	IdType
GROSS	Box 1a. Gross amount of payment card/third party network transactions	AmountType
CARDNOTPRESENT	Box 1b. Card Not Present Transactions	AmountType
CASHTIPS	Box 1c. Cash Tips. New for TY2026	AmountType
OCCUPATIONCODE1	Box 1d. Treasury Tipped Occupation Code (TTOC). New for TY2026	IdType
OCCUPATIONCODE2	Box 1d. Treasury Tipped Occupation Code (TTOC). New for TY2026	IdType
CATCODE	Box 2. Merchant category code	GenericNameType
NUMTRAN	Box 3. Number of purchase transactions	GenericNameType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
JAN	Box 5a. January	AmountType
FEB	Box 5b. February	AmountType
MAR	Box 5c. March	AmountType

Tag	Description	Type
APR	Box 5d. April	AmountType
MAY	Box 5e. May	AmountType
JUN	Box 5f. June	AmountType
JUL	Box 5g. July	AmountType
AUG	Box 5h. August	AmountType
SEP	Box 5i. September	AmountType
OCT	Box 5j. October	AmountType
NOV	Box 5k. November	AmountType
DEC	Box 5l. December	AmountType
PSENAME	PSE's name	GenericNameType
PSEPHONE	PSE's phone number	PhoneType

1.22. Tax1099LTC_V100

Form 1099-LTC - Long-Term Care and Accelerated Death Benefits

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
POLICYHOLDERADDR	Policy holder name and address	PolicyholderAddressType
INSUREDADDR	Insured name and address	InsuredAddressType
PAYERADDR	Payer name and address	PayerAddressType
PAYERID	PAYER’S federal identification number	GenericNameType
POLICYHOLDERID	POLICYHOLDER'S identification number	IdType
RECACCT	Account number	GenericNameType

Tag	Description	Type
LONGTERMBEN	Box 1. Gross long-term care benefits paid	AmountType
DEATHBEN	Box 2. Accelerated death benefits paid	AmountType
PERDIEM	Per diem	BooleanType
REIMB	Reimbursed amount	BooleanType
INSUREDID	INSURED'S taxpayer identification no.	IdType
QUALCONTRACT	Qualified contract	BooleanType
CHRONIC	Chronically ill	BooleanType
TERMINAL	Terminally ill	BooleanType
DATECERT	Date certified (MM/DD/YY)	DateTimeType

1.23. Tax1099MISC_V100

Form 1099-MISC - Miscellaneous Income

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
RENTS	Box 1. Rents	AmountType
ROYALTIES	Box 2. Royalties	AmountType
OTHERINCOME	Box 3. Other income	AmountType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
FISHBOATPRO	Box 5. Fishing boat proceeds	AmountType
MEDHEALTHPAY	Box 6. Medical and health payments	AmountType

Tag	Description	Type
NONEMPCOMP	IRS removed TY20, now on 1099-NEC	AmountType
SUBPMTS	Box 8. Substitute payments in lieu of dividends or interest	AmountType
PAYER5KSALES	Box 7. Payer made direct sales totally $5,000 or more	BooleanType
CROPINSPRO	Box 9. Crop insurance proceeds	AmountType
FORTAXPD	IRS removed from form TY14	AmountType
FORCNT	IRS removed from form TY14	GenericNameType
STTAXWH	State tax withheld	AmountType
PAYERSTATE	State abbreviation	StateCodeType
PAYERSTID	State identification number	IdType
STINCOME	State income	AmountType
ADDLSTTAXWHAGG+	State withholding information	AdditionalStateTaxWithheldAggregate
GROSSATTOR	Box 10. Gross proceeds paid to an attorney	AmountType
EXCSGLDN	IRS removed TY25, now on 1099-NEC	AmountType
SEC409ADEFERRALS	Box 12. Section 409A deferrals	AmountType
FISHPURRESALE	Box 11. Fish purchased for resale. NEW TY21	AmountType
CASHTIPS	Box 13a. Cash Tips. New for TY2026	AmountType
OCCUPATIONCODE1	Box 13b. Treasury Tipped Occupation Code (TTOC). New for TY2026	IdType
OCCUPATIONCODE2	Box 13b. Treasury Tipped Occupation Code (TTOC). New for TY2026	IdType

Tag	Description	Type
OVERTIME	Box 14. Overtime compensation. New for TY2026	AmountType
SEC409AINCOME	IRS removed TY20	AmountType
PAYERADDR	Payer name and address	PayerAddress
PAYERID	Payer tax identification number	GenericNameType
RECADDR	Recipient name and address	RecipientAddress
RECID	Recipient tax identification number	IdType
RECACCT	Account number	GenericNameType
TINNOT	Second TIN notice. IRS removed TY20.	BooleanType
FATCA	FATCA filing requirement	BooleanType
NONQUALDEFERREDCOMP	Box 15. Nonqualified deferred compensation. New TY20	AmountType

1.24. Tax1099NEC_V100

Form 1099-NEC - Non-Employee Compensation. New TY20

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
NONEMPCOMP	Box 1a. Nonemployee compensation	AmountType
CASHTIPS	Box 1b. Cash Tips. New for TY2026	AmountType
OCCUPATIONCODE1	Box 1c. Treasury Tipped Occupation Code (TTOC). New for TY2026	IdType

Tag	Description	Type
OCCUPATIONCODE2	Box 1c. Treasury Tipped Occupation Code (TTOC). New for TY2026	IdType
OVERTIME	Box 1d. Overtime Compensation. New for TY2026	AmountType
PAYER5KSALES	Box 2. Payer made direct sales totaling $5,000 or more of consumer product for resale. New TY21	BooleanType
EXCSGLDN	Box 3. Excess golden parachute payments. New TY25	AmountType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
STTAXWH	State tax withheld	AmountType
PAYERSTATE	State abbreviation	StateCodeType
PAYERSTID	State identification number	IdType
STINCOME	State income	AmountType
ADDLSTTAXWHAGG+	State tax withholding information	AdditionalStateTaxWithheldAggregate
PAYERADDR	Payer name and address	PayerAddress
PAYERID	Payer tax identification number	GenericNameType
RECADDR	Recipient name and address	RecipientAddress
RECID	Recipient tax identification number	IdType
RECACCT	Account number	GenericNameType
TINNOT	Second TIN Notice	BooleanType
FATCA	FATCA filing requirement. IRS removed TY21	BooleanType

1.25. Tax1099OID_V100

Form 1099-OID - Original Issue Discount

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
ORIGISDISC	Box 1. Original issue discount for the year	AmountType
OTHERPERINT	Box 2. Other periodic interest	AmountType
ERLWITHPEN	Box 3. Early withdrawal penalty	AmountType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
MARKETDISCOUNT	Box 5. Market discount. NEW for TY14	AmountType
ACQPREMIUM	Box 6. Acquisition premium. NEW for TY14	AmountType
FORTAXPD	TY14 IRS removed from form	AmountType
FORCNT	TY14 - IRS removed from form	GenericNameType
DESCRIPTION	Box 7. Description	LongMessageType
OIDONUSTRES	Box 8. Original issue discount on U.S. Treasury obligations	AmountType
INVESTEXP	Box 9. Investment expenses	AmountType
BONDPREMIUM	Box 10. Bond premium. New TY16	AmountType
TAXEXEMPTOID	Box 11. Tax-exempt OID. New TY17	AmountType
ORIGSTATE+	New TY18	OriginatingStateAggregate
PRIVACTBONDAMT	New TY17 - not on IRS 1099-	AmountType

Tag	Description	Type
	OID 2017 form but requested for reporting AMT to IRS	
PRIVACTBONDINT	New TY17 - not on IRS 1099-OID 2017 form but requested for reporting AMT interest percentage to IRS	RateType
STATECODE	2 DIGIT STATE CODE	StateCodeType
STATEIDNUM	PAYER STATE ID NUMBER	IdType
STATETAXWHELD	State tax withheld	AmountType
ADDLSTATETAXWHAGG+	State tax withholding information	AddlStateTaxWheldAggregate
PAYERADDR	Payer name and address	PayerAddress
PAYERID	Payer tax identification number	GenericNameType
RECADDR	Recipient name and address	RecipientAddress
RECID	Recipient tax identification number	IdType
RECACCT	Account number	GenericNameType
TINNOT	Second TIN notice	BooleanType
FATCA	FATCA filing requirement	BooleanType

1.26. Tax1099PATR_V100

Form 1099-PATR - Taxable Distributions Received From Cooperatives

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
PAYERADDR	Payer name and address	PayerAddressType
RECIPADDR	Recipient name and address	RecipientAddressType

Tag	Description	Type
PAYERID	PAYER’S federal identification number	GenericNameType
RECID	RECIPIENT’S identification number	IdType
ACCTNUM	Account number	GenericNameType
PATRDIV	Box 1. Patronage dividends	AmountType
NONPATRDIST	Box 2. Nonpatronage distributions	AmountType
PERUNIT	Box 3. Per-unit retain allocations	AmountType
FEDWITHHOLDING	Box 4. Federal income tax withheld	AmountType
REDEMPTION	Box 5. Redeemed nonqualified notices	AmountType
DPADED	Domestic production activities deduction. IRS removed TY20.	AmountType
QUALIFIEDPAYMENTS	Box 7. Qualified payments (Section 199A(b)(7)). New TY19.	AmountType
INVESTCRED	Box 10. Investment credit	AmountType
WORKOPPCRED	Box 11. Work opportunity credit	AmountType
AMTADJUST	Patron’s AMT adjustment. IRS removed TY20.	AmountType
OTHER	Box 12. Other credits and deductions	AmountType
S199AGDEDUCTION	Box 6, Section 199A(g) deduction. New TY20	AmountType
S199AAQUALITEMS	Box 8, Section 199A(a) qualified items. New TY20	AmountType
S199AASSTBITEMS	Box 9, Section 199A(a) SSTB (Specified Service Trade or Business) items. New TY20	AmountType

Tag	Description	Type
SPECIFIEDCOOP	Box 13. Specified Cooperative. New TY20	BooleanType
FORM8844CREDIT	Box 12. Empowerment Zone Credit (Form 8844)	AmountType
FORM8864CREDIT	Box 12. Biodiesel and Renewable Diesel Fuels Credit (Form 8864)	AmountType
FORM8896CREDIT	Box 12. Low Sulfur Diesel Fuel Production Credit (Form 8896)	AmountType
FORM8932CREDIT	Box 12. Credit for Employer Differential Wage Payments (Form 8932)	AmountType
SULFURDEDUCTION	Box 12. EPA Sulfur Regulations Deduction Amount	AmountType
FORM8941CREDIT	Box 12. Credit for Small Employer Health Insurance Premiums (Form 8941)	AmountType

1.27. Tax1099Q_V100

Form 1099-Q - Payments From Qualified Education Programs

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
PAYERADDR	Payer name and address	PayerAddressType
RECIPADDR	Recipient name and address	RecipientAddressType
PAYERID	PAYER’S/TRUSTEE'S federal identification no.	GenericNameType
RECID	RECIPIENT’S taxpayer identification no.	IdType

Tag	Description	Type
ACCTNUM	Account number	GenericNameType
GROSSDISTRIB	Box 1. Gross distribution	AmountType
EARNINGS	Box 2. Earnings	AmountType
BASIS	Box 3. Basis	AmountType
TRUSTEE	Box 4. Trustee-to-trustee transfer	BooleanType
NOTBENEFICIARY	Box 6. If this box is checked, the recipient is not the designated beneficiary	BooleanType
QTPPRIV	Box 5a. Qualified tuition plan - Private	BooleanType
QTPPUBLIC	Box 5b. Qualified tuition plan - Public	BooleanType
COVERDELL	Box 5c. Coverdell ESA	BooleanType

1.28. Tax1099R_V100

Form 1099-R - Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
GROSSDIST	Box 1. Gross distribution	AmountType
TAXAMT	Box 2a. Taxable amount	AmountType
TAXAMTND	Box 2b. Taxable amount not determined	BooleanType
TOTALDIST	Box 2c. Total distribution	BooleanType
CAPGAIN	Box 3. Capital gain	AmountType

Tag	Description	Type
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
EMPCONTINS	Box 5. Employee contributions	AmountType
NETUNAPEMP	Box 6. Net unrealized appreciation	AmountType
DISTCODE+	Box 7a. Distribution codes	CharType
IRASEPSIMP	Box 7b. IRA/SEP/SIMPLE	BooleanType
TRUMPACCT	Box 7c. Trump account. New for TY2026	BooleanType
EXCESSEARNINGS	Box 7d. Earnings on excess contributions. New for TY2026	AmountType
ANNCTRCTDIST	Box 8a. Other amount	AmountType
ANNCTRCTPER	Box 8b. Other percent	RateType
PERTOTDIST	Box 9a. Your percent of total distribution	RateType
TOTEMPCONT	Box 9b. Total employee contributions	AmountType
AMTALLOCABLEIRR	Box 10. Amount allocable to IRR within 5 years. added 8-3-11	AmountType
FIRSTYEARDESIGROTH	Box 11. First year of designated Roth contributions. A four-digit year.	YearType
STTAXWHAGG+	State tax withholding information	StateTaxWithheldAggregate
LCLTAXWHAGG+	Local tax withholding information	LocalTaxWithheldAggregate
PAYERADDR	Payer name and address	PayerAddress
PAYERID	Payer tax identification number	GenericNameType
RECADDR	Recipient name and address	RecipientAddress
RECID	Recipient tax identification	IdType

Tag	Description	Type
	number	
RECACCT	Account number	GenericNameType
FATCA	Box 12. Foreign Account Tax Compliance Act applies. New TY16	BooleanType
DTBENEFITPMT	Box 13. Date of payment. New TY18	DateTimeType

1.29. Tax1099SA_V100

Form 1099-SA - Distributions From an HSA, Archer MSA, or Medicare Advantage MSA

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
PAYERADDR	Payer name and address	PayerAddressType
RECIPADDR	Recipient name and address	RecipientAddressType
PAYERID	PAYER'S federal identification number	GenericNameType
RECID	RECIPIENT'S identification number	IdType
ACCTNUM	Account number	GenericNameType
GROSSDIST	Box 1. Gross distribution	AmountType
EARNINGS	Box 2. Earnings on excess cont.	AmountType
DISTCODE	Box 3. Distribution code	GenericNameType
FMVON	Box 4. FMV on date of death	AmountType
HSA	Box 5a. HSA	BooleanType
ARCHER	Box 5b. Archer MSA	BooleanType

Tag	Description	Type
MSA	Box 5c. MA MSA	BooleanType

1.30. Tax1099S_V100

Form 1099-S - Proceeds From Real Estate Transactions

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
FILERADDR	Filer name and address	FilerAddressType
TRANSFERORADDR	Transferor name and address	TransferorAddressType
FILERID	FILER'S federal identification number	GenericNameType
TRANSFERORID	TRANSFEROR'S identification number	IdType
ACCTNUM	Account or escrow number	GenericNameType
DATECLOSE	Box 1. Date of closing	DateTimeType
GROSSPROC	Box 2. Gross proceeds	AmountType
ADDRDESC	Box 3. Address or legal description	MessageType
PROPSERV	Box 6. Transferor received or will receive property or services as part of the consideration (if checked) .	BooleanType
FOREIGNPERSON	Box 7. If checked, transferor is a foreign person (nonresident alien, Foreign partnership, foreign estate, or foreign trust)	BooleanType
RETAX	Box 4. Buyer's part of real estate tax	AmountType

Tag	Description	Type
DIGITALASSETCODE	Box 8a. Code for digital asset received, or to be received, as consideration	GenericNameType
DIGITALASSETNAME	Box 8b. Name of digital asset received, or to be received, as consideration	GenericNameType
UNITS	Box 8c. Number of digital asset units received, or to be received, as consideration	AmountType
DIGITALASSETDATERECEIVED	Box 8d. Date digital asset received, or to be received, as consideration	DateTimeType

1.31. Tax1120SK1_V100

Form 1120-S Schedule K-1 - Shareholder's Share of Income, Deductions, Credits, etc.

Tag	Description	Type
SRVRTID	ID assigned by server to document	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
FINALK1	Final K-1	BooleanType
AMENDEDK1	Amended K-1	BooleanType
CORPNAME	Name of Corporation	GenericNameType
CORPEIN	Corporation's employer identification number	GenericNameType
CORPADDRESS	Corporation's address	anonymous
IRSCENTER	IRS Center where corporation filed return	GenericNameType
SHAREHOLDERID	Shareholder's identifying number	GenericNameType

Tag	Description	Type
SHAREHOLDERNAME	Shareholder's name	GenericNameType
SHAREHOLDERADDRESS	Shareholder's address	anonymous
PERCENTAGESTOCKOWNERSHIP	Box G, Current year allocation percentage. New description TY20	AmountType
SHARESBOY	Box H, Shareholder's number of shares, Beginning of tax year. New TY20	AmountType
SHARESEOY	Box H, Shareholder's number of shares, End of tax year. New TY20	AmountType
LOANSBOY	Box I, Loans from shareholder, Beginning of tax year. New TY20	AmountType
LOANSEOY	Box I, Loans from shareholder, End of tax year. New TY20	AmountType
ORDINARYINCOME	Box 1, Ordinary business income	AmountType
NETRENTALREINCOME	Box 2, Net rental real estate income	AmountType
OTHERRENTALINCOME	Box 3, Other net rental income	AmountType
INTERESTINCOME	Box 4, Interest income	AmountType
ORDINARYDIVIDEND	Box 5a, Ordinary dividends	AmountType
QUALIFIEDDIVIDEND	Box 5b, Qualified dividends	AmountType
ROYALTIES	Box 6, Royalties	AmountType
NETSTCAPITALGAIN	Box 7, Net short-term capital gain	AmountType
NETLTCAPITALGAIN	Box 8a, Net long-term capital gain	AmountType
COLLECTIBLES	Box 8b, Collectibles (28%) gain	AmountType
UNRECAPSEC1250GAIN	Box 8c, Unrecaptured section 1250 gain	AmountType

Tag	Description	Type
NETSEC1231GAIN	Box 9, Net section 1231 gain	AmountType
OTHERINCOMELOSS+	Box 10, Other income or loss	CodeAmountType
SEC179DEDUCT	Box 11, Section 179 deduction	AmountType
OTHERDEDUCTIONS+	Box 12, Other deductions	CodeAmountType
CREDITS+	Box 13, Credits	CodeAmountType
FOREIGNCOUNTRY	Foreign country	GenericNameType
FOREIGNTRANSACTIONS+	Foreign transactions	CodeAmountType
AMTITEMS+	Box 15, Alternative minimum tax items	CodeAmountType
ITEMSAFFECTINGSHAREHOLDERBASIS+	Box 16, Items affecting shareholder basis	CodeAmountType
OTHERINFO+	Box 17, Other information	CodeAmountType
FISCALYEARBEGIN	Fiscal year beginning	DateTimeType
FISCALYEAREND	Fiscal year ending	DateTimeType
MULTIPLEATRISKACTIVITIES	Box 18, More than one activity for at-risk purposes.	BooleanType
MULTIPLEPASSIVEACTIVITIES	Box 19, More than one activity for passive activity purposes.	BooleanType

1.32. Tax2439_V100

Form 2439 - Notice to Shareholder of Undistributed Long-Term Capital Gains

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
FISCALYEARBEGIN	Fiscal year beginning	DateTimeType
FISCALYEAREND	Fiscal year ending	DateTimeType

Tag	Description	Type
RICREITADDR	RIC or REIT name and address	Corporation2439AddressType
SHAREHOLDERADDR	Shareholder name and address	Shareholder2439AddressType
RICREITID	Identification number of RIC or REIT	GenericNameType
SHAREHOLDERID	Shareholder’s identifying number	IdType
UNDISTLTCG	Box 1a. Total undistributed long-term capital gains	AmountType
UNRECAP1250	Box 1b. Unrecaptured section 1250 gain	AmountType
SEC1202GAIN	Box 1c. Section 1202 gain	AmountType
COLLECTIBLESGAIN	Box 1d. Collectibles (28%) gain	AmountType
TAXPAID	Box 2. Tax paid by the RIC or REIT on the box 1a gains	AmountType

1.33. Tax5227K1_V100

5227 K-1 - Split-Interest Trust Beneficiary’s Share of Income, Deductions, Credits, etc.

Tag	Description	Type
SRVRTID	ID assigned by server to document	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
FINALK1	Final K-1	BooleanType
AMENDEDK1	Amended K-1	BooleanType
ESTATETRUSTNAME	Name of Estate/Trust	GenericNameType
ESTATETRUSTEIN	Estate or trust employer identification number	GenericNameType
FIDUCIARYINFO	Fiduciary's name and address	anonymous
WASFILEDFORM1041T	Was Form 1041-T filed?	BooleanType

Tag	Description	Type
DATEFILEDFORM1041T	Date the Form 1041-T was filed	DateTimeType
ISFINAL1041T	Is this the final Form 1041 for the estate or trust?	BooleanType
BENEFICIARYID	Beneficiary's identifying number	GenericNameType
BENEFICIARYINFO	Beneficiary's name and address	anonymous
DOMESTICBENEFICIARY	Box H, Domestic beneficiary	BooleanType
FOREIGNBENEFICIARY	Box H, Foreign beneficiary	BooleanType
INTERESTINCOME	Box 1, Interest income	AmountType
ORDINARYDIVIDEND	Box 2a, Ordinary dividends	AmountType
QUALIFIEDDIVIDEND	Box 2b, Qualified dividends	AmountType
NETSTCAPITALGAIN	Box 3, Net short-term capital gain	AmountType
NETLTCAPITALGAIN	Box 4a, Net long-term capital gain	AmountType
RATEGAIN28	Box 4b, 28% rate gain	AmountType
UNRECAP1250GAIN	Box 4c, Unrecaptured section 1250 gain	AmountType
OTHERPORTFOLIOINCOME	Box 5, Other portfolio and nonbusiness income	AmountType
ORDINARYBUSINESSINC	Box 6, Ordinary business income	AmountType
NETRENTALREINCOME	Box 7, Net rental real estate income	AmountType
OTHERRENTALINCOME	Box 8, Other rental income	AmountType
APPORTIONDEDUCTIONS+	Box 9, Directly apportioned deductions	CodeAmountType
ESTATETAXDEDUCTION	Box 10, Estate tax deduction	AmountType
FINALYRDEDUCTIONS+	Box 11, Final year deductions	CodeAmountType

Tag	Description	Type
AMTITEMS+	Box 12, Alternative minimum tax adjustments	CodeAmountType
CREDITS+	Box 13, Credits	CodeAmountType
OTHERINFO+	Box 14, Other information	CodeAmountType
FISCALYEARBEGIN	Fiscal year beginning	DateTimeType
FISCALYEAREND	Fiscal year ending	DateTimeType

1.34. Tax5498ESA_V100

Form 5498-ESA - Coverdell ESA Contribution Information

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Document was voided	BooleanType
CORRECTED	Document is corrected	BooleanType
TRUSTEEADDR	Trustee name and address	TrusteeAddressType
BENEFICIARYADDR	Beneficiary name and address	BeneficiaryAddressType
TRUSTEEID	TRUSTEE’S/ISSUER’S federal identification no.	GenericNameType
BENEFICIARYID	BENEFICIARY'S social security number	IdType
ACCTNUM	Account number	GenericNameType
ESACONTRIB	Box 1. Coverdell ESA contributions	AmountType
ROLLOVER	Box 2. Rollover contributions	AmountType

1.35. Tax5498SA_V100

Form 5498-SA - HSA, Archer MSA, or Medicare Advantage MSA Information

Tag	Description	Type

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Document was voided	BooleanType
CORRECTED	Document is corrected	BooleanType
TRUSTEEADDR	Trustee name and address	TrusteeAddressType
PARTICIPANTADDR	Participant name and address	ParticipantAddressType
TRUSTEEID	TRUSTEE’S federal identification number	GenericNameType
PARTICIPANTID	PARTICIPANT'S social security number	IdType
ACCTNUM	Account number	GenericNameType
MSACONTRIB	Box 1. Employee or self-employed person’s Archer MSA contributions made in calendar year and the subsequent year for the calendar year	AmountType
TOTALCONTRIB	Box 2. Total contributions made in the calendar year	AmountType
TOTALMADE	Box 3. Total HSA or Archer MSA contributions made in the subsequent year for the calendar year	AmountType
ROLLOVER	Box 4. Rollover contributions	AmountType
FMV	Box 5. Fair market value OF HSA, Archer MSA, or MA MSA	AmountType
HSA	Box 6. HSA	BooleanType
ARCHER	Box 6. Archer MSA	BooleanType
MAMSA	Box 6. MA MSA	BooleanType

1.36. Tax5498TA_V100

Form 5498-TA Trump Account Contribution Information

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Document was voided	BooleanType
CORRECTED	Document is corrected	BooleanType
TRUSTEEADDR	Trustee name and address	TrusteeAddressType
BENEFICIARYADDR	Beneficiary name and address	BeneficiaryAddressType
TRUSTEEID	TRUSTEE's or ISSUER'S federal identification number	GenericNameType
BENEFICIARYID	BENEFICIARY's social security number	IdType
ACCTNUM	Account number	GenericNameType
PILOTGENERALCONTRIB	Box 1. Pilot program and qualified general contributions	AmountType
QUALROLLOVER	Box 2. Qualified rollover contributions	AmountType
SEC128EMPLOYERCONT	Box 3. Section 128 employer contributions	AmountType
OTHERCONT	Box 4. Other contributions	AmountType
BASISINVESTCONTRACT	Box 5. Basis or investment in the contract	AmountType
FMVACCT	Box 6. FMV of account	AmountType

1.37. Tax5498_V100

Form 5498 - IRA Contribution Information

Tag	Description	Type
SRVRTID	ID assigned to document by	ServerIdType

Tag	Description	Type
	server	
TAXYEAR	Tax year	YearType
VOID	Document was voided	BooleanType
CORRECTED	Document is corrected	BooleanType
TRUSTEEADDR	Trustee name and address	TrusteeAddressType
PARTICIPANTADDR	Participant name and address	ParticipantAddressType
TRUSTEEID	TRUSTEE's or ISSUER'S federal identification number	GenericNameType
PARTICIPANTID	PARTICIPANT's social security number	IdType
ACCTNUM	Account number	GenericNameType
IRACONTRIB	Box 1. IRA contributions	AmountType
ROLLOVER	Box 2. Rollover contributions	AmountType
CONVERS	Box 3. Roth IRA conversion amount	AmountType
RECHAR	Box 4. Recharacterized contributions	AmountType
FMVACCT	Box 5. Fair market value of account	AmountType
LIFEINS	Box 6. Life insurance cost included in box 1	AmountType
SEPCONT	Box 8. SEP contributions	AmountType
SIMCONT	Box 9. SIMPLE contributions	AmountType
ROTHCONT	Box 10. Roth IRA contributions	AmountType
RMDNEXTYEAR	Box 11. If checked, required minimum distribution for next tax year	BooleanType
RMDDATE	Box 12a. RMD date	DateTimeType
RMDAMOUNT	Box 12b. RMD amount	AmountType
POSTPONE	Box 13a. Postponed	AmountType

Tag	Description	Type
	contribution	
POSWTPONEYEAR	Box 13b. Year	YearType
POSTPONECODE	Box 13c. Code	GenericNameType
REPAY	Box 14a. Repayments	AmountType
REPAYCODE	Box 14b. Code	GenericNameType
FMVSPECIFIED	Box 15a. FMV of certain specified assets	AmountType
SPECIFIEDCODE	Box 15b. Code(s)	GenericNameType
IRA	Box 7a. IRA	BooleanType
SEP	Box 7b. SEP	BooleanType
SIMPLE	Box 7c. SIMPLE	BooleanType
ROTHIRA	Box 7d. ROTHIRA	BooleanType

1.38. TaxW2C_V200

IRS Form W2-C, Corrected Wage and Tax Statement. New TY20

Tag	Description	Type
TAXYEAR	Tax year	YearType
CNTRLNO	Control number	ControlNumber
VOID	Form was voided	BooleanType
EMPLOYER	Employer information	Employer
EMPLOYEE	Employee information	Employee
CORRECTEDSSNORNAME	Box e, Corrected SSN and/or name	BooleanType
PREVIOUSSSN	Box f, Employee's previously reported SSN	GenericNameType
PREVIOUSNAME	Box g, Employee's previously reported name	EmployeeName
ORIGINALW2	Boxes 1-20 of Previously reported Wage and Tax Statement	TaxW2_V200

Tag	Description	Type
CORRECTEDW2	Boxes 1-20 of Correct information Wage and Tax Statement	TaxW2_V200

1.39. TaxW2G_V100

Form W-2G - Certain Gambling Winnings

Tag	Description	Type
PAYERADDR	Payer name and address	PayerW2GAddressType
WINNERADDR	Winner name and address	WinnerAddressType
CORRECTED	CORRECTED (if checked)	BooleanType
PAYERID	PAYER'S federal identification number	GenericNameType
WINNINGS	Box 1. Reportable winnings	AmountType
DATEWON	Box 2. Date won	DateTimeType
TYPEWAGER	Box 3. Type of wager	GenericNameType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
TRANSACTION	Box 5. Transaction	GenericNameType
RACE	Box 6. Race	GenericNameType
INDENTICAL	Box 7. Winnings from identical wagers	AmountType
CASHIER	Box 8. Cashier	GenericNameType
WINNERID	Box 9. Winner's taxpayer identification no.	IdType
WINDOW	Box 10. Window	GenericNameType
FIRSTID	Box 11. First I.D.	GenericNameType
SECONDID	Box 12. Second I.D.	GenericNameType
STWINNINGS	Box 14. State winnings	AmountType
STATETAXWH	Box 15. State income tax withheld	AmountType

Tag	Description	Type
LOCALWINNINGS	Box 16. Local winnings	AmountType
LOCALTAXWH	Box 17. Local income tax withheld	AmountType
LOCALITY	Box 18. Name of locality	GenericNameType
PAYERSTATEID	PAYER’s state identification no.	GenericNameType
PAYSTATE	State	GenericNameType

1.40. TaxW2_V200

Form W-2 Version 200

Tag	Description	Type
TAXYEAR	Tax year	YearType
CNTRLNO	Control number	ControlNumber
VOID	Form was voided	BooleanType
EMPLOYER	Employer information	Employer
EMPLOYEE	Employee information	Employee
WAGES	Box 1. Wages, tips, other compensation	AmountType
FEDTAXWH	Box 2. Federal income tax withheld	AmountType
SSWAGES	Box 3. Social security wages	AmountType
SSTAXWH	Box 4. Social security tax withheld	AmountType
MEDICAREWAGES	Box 5. Medicare wages and tips	AmountType
MEDICARETAXWH	Box 6. Medicare tax withheld	AmountType
SSTIPS	Box 7. Social security tips	AmountType
ALLOCATEDTIPS	Box 8. Allocated tips	AmountType
ADVANCEDEIC	Advanced Earned Income Credit. Obsolete	AmountType

Tag	Description	Type
DEPCAREBENEFIT	Box 10. Dependent care benefits	AmountType
NONQUALPLAN	Box 11. Nonqualified plans	AmountType
CODES+	Box 12a,b,c,d. Codes and amounts	Codes
OTHER+	Box 14a. Other	Other
OCCUPATIONCODE1	Box 14b. Treasury Tipped Occupation Code (TTOC). New for TY2026	IdType
OCCUPATIONCODE2	Box 14b. Second Treasury Tipped Occupation Code (TTOC). New for TY2026	IdType
STATUTORY	Box 13. Statutory employee	BooleanType
RETIREMENTPLAN	Box 13. Retirement plan	BooleanType
THIRDPARTYSICKPAY	Box 13. Third-party sick pay	BooleanType
DEFERREDCOMP	Deferred compensation	BooleanType
STATEINFO+	Boxes 15, 16, 17. State information	StateInfo
LOCALINFO+	Boxes 18, 19, 20. Local information	LocalInfo
W2VERIFICATIONCODE	Obsolete, removed by IRS for TY19.	anonymous
ESPPQUALDIS	Employee Stock Purchase Plan Qualified Disposition amount, added for TY19.	AmountType
ESPPNONQUALDIS	Employee Stock Purchase Plan Non-qualified Disposition amount, added for TY19.	AmountType

2. Complex Types

2.1. AdditionalAmountType

Additional amounts with a free-form text description

Tag	Description	Type
DESC	Description of the additional amount	InfoType
AMOUNT	Required. The additional amount	AmountType

2.2. AdditionalOtherAmountType

Additional amounts and free-form text description for any Box number and Code value

Tag	Description	Type
DESC	Description of the additional amount	InfoType
AMOUNT	Required. The additional amount	AmountType
BOX	Box number, if needed, for additional amount	GenericNameType
K1CODE	Code, if needed, for additional amount	GenericNameType

2.3. AdditionalStateTaxWithheldAggregate

Additional State Tax Withheld Aggregate

Tag	Description	Type
STTAXWH	State income tax withheld	AmountType
PAYERSTATE	State abbreviation	StateCodeType
PAYERSTID	State tax identification number	IdType
STINCOME	State income amount	AmountType

2.4. AddlStateTaxWheldAggregate

Additional state tax withheld information

Tag	Description	Type
STATECODE	State abbreviation	StateCodeType
STATEIDNUM	State identification number	IdType
STATETAXWHELD	State tax withheld	AmountType

2.5. AddlStateTaxWheldAggregateType

State tax withholding information

Tag	Description	Type
STATECODE	State abbreviation	StateCodeType
STATEIDNUM	State identification number	IdType
STATETAXWHELD	State tax withheld	AmountType

2.6. AlternativeMinimumTaxDetail

Additional K-1 Supplement detail entry for 1065 box 17 and 1120S box 15 and 1041 box 12, Alternative Minimum Tax (AMT) items, for all codes

Tag	Description	Type
ADJUSTEDGAINORLOSS	K-1 Supplement detail for 1065 box 17 and 1120S box 15 and 1041 box 12, Alternative Minimum Tax (AMT) items, with code B for Adjusted gain or loss	anonymous
OTHERAMTITEMS	K-1 Supplement detail for 1065 box 17 and 1120S box 15 and 1041 box 12, Alternative Minimum Tax (AMT) items, with code F for Other AMT items	anonymous

2.7. BeneficiaryAddressType

Beneficiary Name and Address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
BENEFICIARYNAME1	Beneficiary line 1	GenericNameType
BENEFICIARYNAME2	Beneficiary line 2	GenericNameType

2.8. BorrowerAddress

Borrower Address

Tag	Description	Type
BORROWERNAME	Borrower name	GenericNameType
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City/town	AddressType
STATE	State/province abbreviation	StateType
POSTALCODE	ZIP/foreign code	ZipType

2.9. BorrowerAddressType

Borrower name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Recipient address line 1	AddressType
ADDR2	Recipient address line 2	AddressType
ADDR3	Recipient address line 3	AddressType
CITY	Recipient city	AddressType
STATE	Recipient state abbreviation	StateType
POSTALCODE	Recipient ZIP code	ZipType
BORROWERNAME1	Borrower name line 1	GenericNameType
BORROWERNAME2	Borrower name line 2	GenericNameType

2.10. ChallengeRequest

Challenge Request

Tag	Description	Type
USERID	User ID	IdType
FICERTID	Financial institution certificate	FinancialInstitutionCertificateId Type

2.11. ChallengeResponse

Challenge Response

Tag	Description	Type
USERID	User ID	IdType
NONCE	Number used once	NumberNCEType
FICERTID	Financial institution certificate	FinancialInstitutionCertificateId Type

2.12. ChallengeTransactionRequest

Challenge Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Client cookie	IdType
TAN	Transaction authorization number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
CHALLENGERQ	Challenge request	ChallengeRequest

2.13. ChallengeTransactionResponse

Challenge Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status	Status
CLTCOOKIE	Client cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
CHALLENGERS	Challenge response	ChallengeResponse

2.14. CodeAmountType

A K-1 form box item of K-1 code and amount

Tag	Description	Type
K1CODE	Code	GenericNameType
AMOUNT	Amount	AmountType

2.15. Codes

Codes

Tag	Description	Type
CODE	Code	anonymous
CODEAMOUNT	Amount	AmountType

2.16. Corporation2439AddressType

Corporation Name and Address

Tag	Description	Type
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
CORPORATIONNAME1	Corporation name line 1	GenericNameType
CORPORATIONNAME2	Corporation name line 2	GenericNameType

2.17. CorporationAddressType

Corporation name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP or foreign postal cod	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
CORPORATIONNAME1	Corporation name line 1	GenericNameType

Tag	Description	Type
CORPORATIONNAME2	Corporation name line 2	GenericNameType

2.18. CoverageHouseholdType

Coverage Household Type"

Tag	Description	Type
COVEREDINDIVNAME	Covered individual name	GenericNameType
COVEREDINDIVSSN	Covered individual social security number	GenericNameType
COVEREDINDIVBIRTHDT	Covered individual date of birth (used when SSN is not known)	DateTimeType
COVEREDINDIVSTARTDT	Month coverage began for covered individual	DateTimeType
COVEREDINDIVENDDT	Month coverage ended for covered individual	DateTimeType

2.19. CoveredIndivGrpType

Covered individual group

Tag	Description	Type
PERSONNM	The name of the covered individual on the health plan	GenericNameType
SSN	The SSN of the covered individual on the health plan	GenericNameType
PERSONBIRTHDT	The date of birth of the covered individual on the health plan when SSN is not present	DateTimeType
ALLYEARIND	Indicates that person was covered by an insurance plan for the entire year.	BooleanType
JANUARYIND	Indicates that person was covered by an insurance plan in January.	BooleanType
FEBRUARYIND	Indicates that person was	BooleanType

Tag	Description	Type
	covered by an insurance plan in February.	
MARCHIND	Indicates that person was covered by an insurance plan in March.	BooleanType
APRILIND	Indicates that person was covered by an insurance plan in April.	BooleanType
MAYIND	Indicates that person was covered by an insurance plan in May.	BooleanType
JUNEIND	Indicates that person was covered by an insurance plan in June.	BooleanType
JULYIND	Indicates that person was covered by an insurance plan in July.	BooleanType
AUGUSTIND	Indicates that person was covered by an insurance plan in August.	BooleanType
SEPTEMBERIND	Indicates that person was covered by an insurance plan in September.	BooleanType
OCTOBERIND	Indicates that person was covered by an insurance plan in October.	BooleanType
NOVEMBERIND	Indicates that person was covered by an insurance plan in November.	BooleanType
DECEMBERIND	Indicates that person was covered by an insurance plan in December.	BooleanType

2.20. CreditorAddressType

Creditor name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP or foreign postal cod	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
CREDITORNAME1	Creditor name line 1	GenericNameType
CREDITORNAME2	Creditor name line 2	GenericNameType

2.21. CreditsDetail

Additional K-1 Supplement detail entry for 1065 box 15 and 1120S box 13 and 1041 box 13, Credits, for all codes

Tag	Description	Type
LOWINCOMEHOUSINGCREDITS	Low income housing credits, 1041 box 13 code C.	anonymous
REHABEXPENDITURES	Qualified rehabilitation expenditures, 1065 box 15 code E and 1065 box 20 code D and 1041 box 13 code D.	anonymous
OTHERCREDITSFORMS1065AND1120S+	K-1 Supplement detail entry for 1065 box 15 and 1120S box 13, Credits, for codes F G M and P	anonymous
OTHERCREDITSALLFORMS+	K-1 Supplement detail entry for	anonymous

Tag	Description	Type
	1065 box 15 and 1120S box 13, Credits, for codes F G M and P; and for 1041 box 13, Credits, for codes F G H I J K L M N O P Q and Z	

2.22. DebtorAddressType

Debtor name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Recipient address line 1	AddressType
ADDR2	Recipient address line 2	AddressType
ADDR3	Recipient address line 3	AddressType
CITY	Recipient city	AddressType
STATE	Recipient state abbreviation	StateType
POSTALCODE	Recipient ZIP code	ZipType
DEBTORNAME1	Debtor name line 1	GenericNameType
DEBTORNAME2	Debtor name line 2	GenericNameType

2.23. DigitalAssetDetail_V100

Detail transactions

Tag	Description	Type
PROCDET_V100	1099-DA detailed information also applicable to 1099-B	ProceedDescription_V100
DTIFCODE	Box 1a. Code for digital asset	DigitalAssetCodeType
DANAME	Box 1b. Name of digital asset	DigitalAssetNameType
DAUNITS	Box 1c. Number of units	DigitalAssetUnitsType
BASISREPORTED	Box 2. Check if basis reported to IRS	BooleanType

Tag	Description	Type
GROSSORNET	Box 3a. Reported to IRS: Gross proceeds or net proceeds	GrossOrNetType
CASHONLY	Box 7. Check if box 1f (proceeds) is only cash	BooleanType
CUSTOMERINFO	Box 8. Check if broker relied on customer-provided acquisition information	BooleanType
STABLECOIN	Box 11a. Check if gross proceeds is an aggregate amount for qualifying stablecoins	BooleanType
NFT	Box 11. Check if gross proceeds is an aggregate amount for specified NFTs	BooleanType
NUMTRANSACTIONS	Box 11b. Number of transactions	CountType
FIRSTSALEPROCEEDS	Box 11c. Aggregate gross proceeds of specified NFTs attributable to first sales by a creator or minter	AmountType
UNITSTRANSFERREDIN	Box 12a. Number of units transferred in	DigitalAssetUnitsType
TRANSFERINDATE	Box 12b. If transferred in, provide transfer-in date	DateTimeType

2.24. DivFromGovIntAggregate

Dividend from US Government Interest

Tag	Description	Type
FUNDNAME	The name of the fund that holds U.S. Government Securities.	LongMessageType
GOVDIVAMT	The total dividend amount from the fund that holds U.S.	AmountType

Tag	Description	Type
	Government Securities.	
AGENCYDETAILS+	The agency type details of the U.S. Government Securities.	USGovernmentSecDetails

2.25. DoneeAddressType

Donee Name and Address

Tag	Description	Type
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City/town	AddressType
STATE	State/province abbreviation	StateType
POSTALCODE	ZIP/foreign code	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
DONEENAME1	Donee name line 1	GenericNameType
DONEENAME2	Donee name line 2	GenericNameType

2.26. DonorAddressType

Donor Name and Address

Tag	Description	Type
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City/town	AddressType
STATE	State/province abbreviation	StateType
POSTALCODE	ZIP/foreign code	ZipType
DONORNAME1	Donor name line 1	GenericNameType

Tag	Description	Type
DONORNAME2	Donor name line 2	GenericNameType

2.27. Employee

Employee

Tag	Description	Type
SSN	Employee's social security number	TaxIdType
FIRSTNAME	Employee's first name	GenericNameType
MIDDLENAME	Employee's middle name	GenericNameType
LASTNAME	Employee's last name	GenericNameType
SUFFIX	Employee's suffix	GenericNameType
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Employee's address line 1	AddressType
ADDR2	Employee's address line 2	AddressType
ADDR3	Employee's address line 3	AddressType
CITY	Employee's city	AddressType
STATE	Employee's state abbreviation	StateType
POSTALCODE	Employee's ZIP code	ZipType
COUNTRYSTRING	Employee's country	CountryStringType

2.28. EmployeeInfo

Employee Information

Tag	Description	Type
SSN	Employee social security number	GenericNameType
NAME	First name, middle initial, last name)	GenericNameType
ADDR1	Employee address line 1	AddressType

Tag	Description	Type
ADDR2	Employee address line 2	AddressType
CITY	Employee city	AddressType
STATE	Employee state abbreviation (e.g. KS)	StateType
POSTALCODE	Employee ZIP or foreign postal code	ZipType
COUNTRYSTRING	Employee country	CountryStringType

2.29. EmployeeName

Fields for previous employee name in TaxW2C_V200, added for TY20

Tag	Description	Type
FIRSTNAME	Employee's first name	GenericNameType
MIDDLENAME	Employee's middle name	GenericNameType
LASTNAME	Employee's last name	GenericNameType
SUFFIX	Employee's suffix	GenericNameType

2.30. Employer

Employer

Tag	Description	Type
FEDIDNUMBER	Employer identification number (EIN)	GenericNameType
NAME1	Employer's name line 1	GenericNameType
NAME2	Employer's name line 2	GenericNameType
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Employer's address line 1	AddressType
ADDR2	Employer's address line 2	AddressType
ADDR3	Employer's address line 3	AddressType
CITY	Employer's city	AddressType

Tag	Description	Type
STATE	Employer's state	StateType
POSTALCODE	Employer's ZIP code	ZipType
COUNTRYSTRING	Employer's country	CountryStringType

2.31. ExtendedBInfo_V100

Extended 1099-B information

Tag	Description	Type
PROCSUM_V100+	Summary transactions. New TY18	ProceedSummary_V100
PROCDET_V100+	Detail transactions. New TY18	ProceedDescription_V100
TEINTEREST	OBSOLETE	AmountType
PABINTEREST	OBSOLETE	AmountType
TEINTDIVIDEND	OBSOLETE	AmountType
PABDIVIDEND	OBSOLETE	AmountType

2.32. ExtendedDAInfo_V100

Detailed 1099-DA information

Tag	Description	Type
PROCSUM_V100+	Summary transactions	ProceedSummary_V100
DADETAIL_V100+	Detail transactions	DigitalAssetDetail_V100

2.33. FIDirectDepositInfo

Financial Institution Direct Deposit Information

Tag	Description	Type
FINAME_DIRECTDEPOSIT	Financial institution name	GenericNameType
FIROUTINGNUM	Routing transit number	BankIdType
FIACCTNUM	Account number for the Direct Deposit	AccountIdType
FIACCOUNTNICKNAME	Account nickname	GenericNameType

2.34. FilerAddress

Tag	Description	Type
FILERNAME	Filer name	GenericNameType
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City/town	AddressType
STATE	State/province abbreviation	StateType
POSTALCODE	ZIP/foreign code	ZipType
PHONE	Phone number	PhoneType
COUNTRYSTRING	Country	CountryStringType

2.35. FilerAddressType

Filer name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP or foreign postal cod	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
FILERNAME1	Filer name line 1	GenericNameType

Tag	Description	Type
FILERNAME2	Filer name line 2	GenericNameType

2.36. FinancialInstitution

Financial Institution

Tag	Description	Type
ORG	Organization name	GenericNameType
FID	Financial Institution ID	FinancialInstitutionIdType

2.37. ForeignIncomeAggregate

Foreign Income Aggregate

Tag	Description	Type
COUNTRYSTRING	Country	CountryStringType
FORINCOMEALLOCAMT	Income allocable to this country	AmountType

2.38. ForeignIncomeAmtAggregate

Foreign Income Amount Aggregate

Tag	Description	Type
QUALIFIEDDIV	Qualified dividend amount	AmountType
CAPITALGAIN	Capital gain distribution amount	AmountType
NONQUALIFIEDDIV	Nonqualified dividend amount	AmountType

2.39. ForeignTaxInformation

Additional K-1 Supplement detail entry for 1041 box 14 Other Information; code B, Foreign Tax Information

Tag	Description	Type
FOREIGNCOUNTRY	Name of foreign country or U.S. possession, or the word TOTAL, for form 1041 box 14 code B.	GenericDescriptionType
FOREIGNGROSSINCOMECA	K-1 form 1041 box 14 code B,	GenericDescriptionType

Tag	Description	Type
TEGORY	selected category of foreign gross income from other categories	
FOREIGNTAXCREDITCARRYOVERREGULAR	Foreign tax credit carryover distributed, on a regular tax basis, included on schedule 1041 K-1, box 14, code B	AmountType
FOREIGNTAXCREDITCARRYOVERMINIMUM	Foreign tax credit carryover distributed, on a minimum tax basis, NOT included on schedule 1041 K-1, box 14, code B	AmountType
FOREIGNINCOMEATESTATEORTRUSTLEVEL+	K-1 Supplement detail entry for form 1041 box 14 code B, foreign income sourced or allocated at the estate or trust level	anonymous
FOREIGNINCOMEANDEXPENSESHAREDLEVEL+	K-1 Supplement detail entry for form 1041 box 14 code B, Foreign Tax Information sourced / allocated at Beneficiary level	SharedLevelForeignIncomeAndExpense
FOREIGNTXPAIDORACCRUED1041K1	K-1 Supplement detail entry for 1041 box 14 code B, Foreign transactions, Foreign taxes paid or accrued	anonymous

2.40. ForeignTransactionsDetail

Additional K-1 Supplement detail entry for 1065 box 16 and 1120S box 14, Foreign Transactions, for all codes

Tag	Description	Type
FOREIGNGROSSINCOMECATEGORY	K-1 forms 1065 box 16 and 1120S box 14 for code H, selected category of foreign gross income from other categories	GenericDescriptionType

Tag	Description	Type
FOREIGNINCOMEANDEXPENSESHAREDLEVEL+	K-1 Supplement detail entry for forms 1065 box 16 and 1120S box 14, Foreign transactions, Partner or Shareholder (codes C, I and J)	SharedLevelForeignIncomeAndExpense
FOREIGNTXPAIDORACCRUED	K-1 Supplement detail entry for 1065 box 16 and 1120S box 14 (codes P and Q)	anonymous

2.41. GuaranteedPaymentDetail

K-1 Supplement detail for 1065 box 4, Guaranteed payments

Tag	Description	Type
GUARANTEEDPMTSFORSERVICES	Guaranteed payments for services	AmountType
GUARANTEEDPMTSFORUSEOFCAPITAL	Guaranteed payments for use of capital	AmountType

2.42. HouseholdInformationType

Household Information Type"

Tag	Description	Type
MONTHCD	Month Code	MonthCdType
MONTHLYPLANPREMIUMAMT	Monthly Premium Amount	AmountType
MONTHLYPREMIUMSLCSPAMT	Monthly second lowest cost silver plan (SLCSP) premium	AmountType
MONTHLYADVANCEPTCAMT	Monthly advance payment of premium tax credit (PTC) amount	AmountType

2.43. InsuredAddressType

Insured name and address

Tag	Description	Type

Tag	Description	Type
INSUREDNAME1	Insured name line 1	GenericNameType
INSUREDNAME2	Insured name line 2	GenericNameType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
PHONE	Phone	PhoneType

2.44. InterestAndDividendDetail

Additional K-1 Supplement detail entry for 1065 boxes 5, 6a and 6b; and 1120S boxes 4, 5a and 5b; 1041 boxes 1, 2a and 2b

Tag	Description	Type
QUALIFIEDUSGOVTINTASDIVIDENDS	U.S. Government interest reported as dividends, qualified portion included on schedule K-1: 1065 box 6b, 1120S box 5b, and 1041 box 2b	AmountType
TOTALUSGOVTINTASDIVIDENDS	U.S. Government interest reported as dividends, Total amount included on schedule K-1: 1065 box 6a, 1120S box 5a, and 1041 box 2a	AmountType
QUALIFIEDFOREIGNDIVIDENDS	Foreign dividend income, qualified portion included on schedule K-1: 1065 box 6b, 1120S box 5b, and 1041 box 2b	AmountType
TOTALFOREIGNDIVIDENDS	Foreign dividend income, Total amount included on schedule K-1: 1065 box 6a, 1120S box 5a, and 1041 box 2a	AmountType

Tag	Description	Type
STATEMUNICIPALINCOME+	K-1 Supplement detail for state municipal interest and exempt-interest dividends for 1065 boxes 5, 6a and 6b; and 1120S boxes 4, 5a and 5b; 1041 boxes 1, 2a and 2b	anonymous

2.45. Issuer1097AddressType

1097 Issuer Name and Address

Tag	Description	Type
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
ISSUERNAME1	Issuer name line 1	GenericNameType
ISSUERNAME2	Issuer name line 2	GenericNameType

2.46. IssuerAddressType

Issuer name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType

Tag	Description	Type
STATE	State abbreviation	StateType
POSTALCODE	ZIP or foreign postal cod	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
ISSUERNAME1	Issuer name line 1	GenericNameType
ISSUERNAME2	Issuer name line 2	GenericNameType

2.47. LenderAddress

Lender Address

Tag	Description	Type
LENDERNAME	Lender name	GenericNameType
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City/town	AddressType
STATE	State/province abbreviation	StateType
POSTALCODE	ZIP/foreign code	ZipType

2.48. LenderAddressType

Lender name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType

Tag	Description	Type
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP or foreign postal cod	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
LENDERNAME1	Lender name line 1	GenericNameType
LENDERNAME2	Lender name line 2	GenericNameType

2.49. LocalInfo

Local Information

Tag	Description	Type
LOCALITY	Locality name	GenericNameType
LOCALWAGES	Local wages, tips, etc	AmountType
LOCALTAXWH	Local income tax withheld	AmountType
LOCALITYSTATE	Locality state	StateCodeType

2.50. LocalTaxWithheldAggregate

Local Tax Withheld information

Tag	Description	Type
AMOUNT	Amount of local tax withheld	AmountType
NAMELCL	Name of locality	GenericNameType
LCLDIST	Distribution amount for locality	AmountType

2.51. MFAChallenge

Multi-Factor Authentication Challenge

Tag	Description	Type
MFAPHRASEID	Phrase ID	IdType
MFAPHRASELABEL	Phrase label	MFAPhraseType

2.52. MFAChallengeAnswer

MFA Challenge Answer

Tag	Description	Type
MFAPHRASEID	Phrase ID	IdType
MFAPHRASEA	Phrase answer	MFAPhraseType

2.53. MFAChallengeRequest

MFA Challenge Request

Tag	Description	Type
DTCLIENT	Client date and time	DateTimeType

2.54. MFAChallengeResponse

MFA Challenge Response

Tag	Description	Type
MFACHALLENGE+	MFA Challenge	MFAChallenge

2.55. MessageSetCore

Message Set Core

Tag	Description	Type
VER	Version number of the message set	VersionType
URL	URL where messages in this set are to be sent	UrlType
OFXSEC	Security level required for this message set	SecurityEnum
TRANSPSEC	Y if transport-level security must be used, N if not used	BooleanType
SIGNONREALM	Signon realm to use with this message set	GenericNameType
LANGUAGE+	Language(s) supported	LanguageEnum

Tag	Description	Type
SYNCMODE	FULL for full synchronization capability. LITE for lite synchronization capability	SyncEnum
REFRESHSUPT	Y if server supports REFRESH within synchronizations. This option is irrelevant for full synchronization servers. Clients must ignore REFRESHSUPT (or its absence) if the profile also specifies SYNCMODE FULL. For lite synchronization, the default is N. Without REFRESHSUPT Y, lite synchronization servers are not required to support REFRESH Y requests	BooleanType
RESPFILEER	Y if server supports file-based error recovery	BooleanType
SPNAME	Service provider name	GenericNameType
OFXEXTENSION	OFX Extension aggregate	OFXExtensionType

2.56. MessageSetList

Message Set List

Tag	Description	Type
SIGNONMSGSET	Sign on message	SignonMessageSet
TAX1099MSGSET	1099 message set	Tax1099MessageSet
TAX1098MSGSET	1098 message set	Tax1098MessageSet
TAXW2MSGSET	W-2 message sest	TaxW2MessageSet
TAX1095MSGSET	1095 message set	Tax1095MessageSet
TAXPDFMSGSET	PDF message set	TaxPDFMessageSet
TAXK1MSGSET	K-1 message set	TaxK1MessageSet
TAX1097MSGSET	1097 message set	Tax1097MessageSet

Tag	Description	Type
TAX5498MSGSET	5498 message set	Tax5498MessageSet
TAXW2GMSGSET	W-2G message set	TaxW2GMessageSet
TAX2439MSGSET	2439 message set	Tax2439MessageSet
PROFMSGSET	Profile message set	ProfileMessageSet
PROFMSGSET	Profile message set	ProfileMessageSet
TAX1099MSGSET	1099 message set	Tax1099MessageSet
TAX1098MSGSET	1098 message set	Tax1098MessageSet
TAXW2MSGSET	W-2 message sest	TaxW2MessageSet
TAX1095MSGSET	1095 message set	Tax1095MessageSet
TAXPDFMSGSET	PDF message set	TaxPDFMessageSet
TAXK1MSGSET	K-1 message set	TaxK1MessageSet
TAX1097MSGSET	1097 message set	Tax1097MessageSet
TAX5498MSGSET	5498 message set	Tax5498MessageSet
TAXW2GMSGSET	W-2G message set	TaxW2GMessageSet
TAX2439MSGSET	2439 message set	Tax2439MessageSet
SIGNONMSGSET	Sign on message	SignonMessageSet
TAX1099MSGSET	1099 message set	Tax1099MessageSet
TAX1098MSGSET	1098 message set	Tax1098MessageSet
TAXW2MSGSET	W-2 message sest	TaxW2MessageSet
TAX1095MSGSET	1095 message set	Tax1095MessageSet
TAXPDFMSGSET	PDF message set	TaxPDFMessageSet
TAXK1MSGSET	K-1 message set	TaxK1MessageSet
TAX1097MSGSET	1097 message set	Tax1097MessageSet
TAX5498MSGSET	5498 message set	Tax5498MessageSet
TAXW2GMSGSET	W-2G message set	TaxW2GMessageSet
TAX2439MSGSET	2439 message set	Tax2439MessageSet
TAX1099MSGSET	1099 message set	Tax1099MessageSet

Tag	Description	Type
TAX1098MSGSET	1098 message set	Tax1098MessageSet
TAXW2MSGSET	W-2 message sest	TaxW2MessageSet
TAX1095MSGSET	1095 message set	Tax1095MessageSet
TAXPDFMSGSET	PDF message set	TaxPDFMessageSet
TAXK1MSGSET	K-1 message set	TaxK1MessageSet
TAX1097MSGSET	1097 message set	Tax1097MessageSet
TAX5498MSGSET	5498 message set	Tax5498MessageSet
TAXW2GMSGSET	W-2G message set	TaxW2GMessageSet
TAX2439MSGSET	2439 message set	Tax2439MessageSet
SIGNONMSGSET	Sign on message	SignonMessageSet
PROFMSGSET	Profile message set	ProfileMessageSet
TAX1099MSGSET	1099 message set	Tax1099MessageSet
TAX1098MSGSET	1098 message set	Tax1098MessageSet
TAXW2MSGSET	W-2 message sest	TaxW2MessageSet
TAX1095MSGSET	1095 message set	Tax1095MessageSet
TAXPDFMSGSET	PDF message set	TaxPDFMessageSet
TAXK1MSGSET	K-1 message set	TaxK1MessageSet
TAX1097MSGSET	1097 message set	Tax1097MessageSet
TAX5498MSGSET	5498 message set	Tax5498MessageSet
TAXW2GMSGSET	W-2G message set	TaxW2GMessageSet
TAX2439MSGSET	2439 message set	Tax2439MessageSet
PROFMSGSET	Profile message set	ProfileMessageSet
SIGNONMSGSET	Sign on message	SignonMessageSet
TAX1099MSGSET	1099 message set	Tax1099MessageSet
TAX1098MSGSET	1098 message set	Tax1098MessageSet
TAXW2MSGSET	W-2 message sest	TaxW2MessageSet
TAX1095MSGSET	1095 message set	Tax1095MessageSet

Tag	Description	Type
TAXPDFMSGSET	PDF message set	TaxPDFMessageSet
TAXK1MSGSET	K-1 message set	TaxK1MessageSet
TAX1097MSGSET	1097 message set	Tax1097MessageSet
TAX5498MSGSET	5498 message set	Tax5498MessageSet
TAXW2GMSGSET	W-2G message set	TaxW2GMessageSet
TAX2439MSGSET	2439 message set	Tax2439MessageSet

2.57. MiscellaneousInformation

K-1 Supplement detail for Miscellaneous Information, not otherwise included on K-1 forms

Tag	Description	Type
NONDIVIDENDDISTRIBUTIONS	Non-dividend distributions, return of capital	AmountType
INTINCOMEONUSGOVTOBLIGATIONS	State income tax information (New Mexico, others?): Interest income received from U.S. government obligations, including any of the following: U.S. savings bonds, Treasury bills, Notes issued by the Federal Home Loan Banks (not including dividends)	AmountType
INCOMEONUSGOVTOBSBELOWTHRESHOLD	Excluded state income tax information: Interest income received from U.S. government obligations from funds which do not pass the state threshold requirement and is thus excluded from state tax adjustments	AmountType
FIDUCIARYADDITION	Fiduciary Addition amount	AmountType
FIDUCIARYADJDETAIL	State income tax information (New York, others?): Beneficiary's share of fiduciary adjustment details	anonymous

Tag	Description	Type
ADDLMISCELLANEOUSINFO+	Additional descriptions and amounts, not otherwise included on K-1 forms	AdditionalAmountType

2.58. OFXElementType

OFX Element Type

Tag	Description	Type
TAGNAME	Tag name	GenericNameType
NAME	Name	GenericNameType
TAGTYPE	Tag Type	TagTypeType
TAGVALUE	Tag Value	TagValueType

2.59. OFXExtensionType

OFX Extension Type

Tag	Description	Type
OFXELEMENT+	Element	OFXElementType

2.60. OriginatingStateAggregate

Originating State Aggregate

Tag	Description	Type
ORIGSTATECODE	State abbreviation	StateCodeType
ORIGSTATEALLOCAMT	State amount	AmountType

2.61. Other

Other

Tag	Description	Type
OTHERDESC	Box 14a. Other description	GenericDescriptionType
OTHERAMOUNT	Box 14a. Other amount	AmountType

2.62. OtherDeductionsDetail

K-1 Supplement detail for 1065 box 13 and 1120S box 12, Other deductions

Tag	Description	Type
SECTION59E2EXPENDITURES	K-1 Supplement detail for 1065 box 13 and 1120S box 12, Other deductions, with code J for Section 59(e)(2) expenditures worksheet	anonymous
PENSIONSANDIRAS	K-1 Supplement detail for 1065 box 13, Other deductions, with code R for Pensions and IRAs	anonymous
OTHERDEDUCTIONS	K-1 Supplement detail for 1065 box 13 code W and 1120S box 12 code S, Other deductions, for Other deductions	anonymous

2.63. OtherIncomeLossDetail

K-1 Supplement detail for 1065 box 11 and 1120S box 10, Other income (loss)

Tag	Description	Type
OTHERPORTFOLIOINCOMELOSS	K-1 Supplement detail for 1065 box 11 and 1120S box 10, Other income (loss), with code A for Other portfolio income (loss)	anonymous
INVOLUNTARYCONVERSIONS	K-1 Supplement detail for 1065 box 11 and 1120S box 10, Other income (loss), with code B for Involuntary conversions	anonymous
OTHERINCOME	K-1 Supplement detail for 1065 box 11 code I and 1120S box 10 code H, Other income (loss), for Other income	anonymous

2.64. OtherInfoDetail

Additional K-1 Supplement detail entry for 1065 box 20 and 1120S box 17, Other information, for all codes

Tag	Description	Type
REHABEXPENDITURESPROPTYPE	Property type of selected qualified rehabilitation expenditures, 1065 box 15 code E and 1065 box 20, code D.	InfoType
BASISOFENERGYPROP	K-1 Supplement detail for 1065 box 20 code D and 1120S box 17 code E, Other information, for Basis of Energy Property (Form 3468)	anonymous
OILANDGASDEPLETION	K-1 Supplement detail for 1065 box 20 code T and 1120S box 17 code R, Other information, for Oil and Gas Depletion	anonymous
OTHERINFORMATION	K-1 Supplement detail for 1065 box 20 code AH and 1120S box 17 code AC, Other information, for Other Information	anonymous

2.65. OtherInfoDetail1041K1

K-1 Supplement detail for 1041 box 14, Other Information

Tag	Description	Type
ADDLOTHERINFO+	Additional codes, descriptions and amounts for 1041 K-1 box 14, Other Information	AdditionalOtherAmountType
TAXEXEMPTINTEREST	Tax-exempt interest	TaxExemptAndShareholderBasisDetail
FOREIGNTAXINFORMATION+	K-1 Supplement detail for 1041 box 14, code B, Foreign Tax Information	ForeignTaxInformation

Tag	Description	Type
SECTION199AREITDIVIDENDS	K-1 Supplement detail for 1041 box 14, code I, Section 199A REIT dividends	AmountType
OTHERINFORMATION1041K1	K-1 Supplement detail for 1041 box 14, code Z, Other Information	anonymous

2.66. OutsideExpensesDetail

Form 1065 K-1 Supplement detail Outside Expenses

Tag	Description	Type
SELFEMPLHEALTHINSPREMSNOTREPORTED	Health insurance premiums paid that were not reported on Form 1095-A	AmountType
PARTNERSHIPACQUISITIONINTPAID	Interest expense from debt used to finance acquisition of partnership interest	AmountType

2.67. PartIIGrpType

Part II Group Type"

Tag	Description	Type
MONTHNAME	Month abbreviation (e.g. JAN)	MonthCdType
COVERAGEOFFERCD	Coverage offer code	anonymous
MONTHLYPREMIUMAMT	Monthly premium amount. Present if COVERAGEOFFERCD is 1B,1C,1D,1E	AmountType
SEC4980HCODE	Section 4980H code	anonymous
POSTALCODE	ZIP Code. New TY20	ZipType

2.68. ParticipantAddressType

Participant Name and Address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
PARTICIPANTNAME1	Participant name line 1	GenericNameType
PARTICIPANTNAME2	Participant name line 2	GenericNameType

2.69. PayeeAddressType

Payee name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Recipient address line 1	AddressType
ADDR2	Recipient address line 2	AddressType
ADDR3	Recipient address line 3	AddressType
CITY	Recipient city	AddressType
STATE	Recipient state abbreviation	StateType
POSTALCODE	Recipient ZIP code	ZipType
PAYEENAME1	Payee name line 1	GenericNameType
PAYEENAME2	Payee name line 2	GenericNameType

2.70. PayerAddress

Payer Name and Address

Tag	Description	Type
PAYERNAME1	Payer name line 1	GenericNameType
PAYERNAME2	Payer name line 2	GenericNameType
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
PHONE	Phone	PhoneType

2.71. PayerAddressType

Payer name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP or foreign postal cod	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
PAYERNAME1	Payer name line 1	GenericNameType
PAYERNAME2	Payer name line 2	GenericNameType

2.72. PayerW2GAddressType

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City/town	AddressType
STATE	State/province abbreviation	StateType
POSTALCODE	ZIP/Foreign postal code	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
PAYERNAME1	Payer name line 1	GenericNameType
PAYERNAME2	Payer name line 2	GenericNameType

2.73. PinChangeRequest

PIN Change Request

Tag	Description	Type
USERID	User ID	IdType
NEWUSERPASS	New password	PasswordType

2.74. PinChangeResponse

PIN Change Response

Tag	Description	Type
USERID	User ID	IdType
DTCHANGED	Date changed	DateTimeType

2.75. PinChangeTransactionRequest

PIN Change Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Client cookie	IdType
TAN	Transaction authorization number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
PINCHRQ	PIN Change Request	PinChangeRequest

2.76. PinChangeTransactionResponse

PIN Change Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status	Status
CLTCOOKIE	Client cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
PINCHRS	PIN change response	PinChangeResponse

2.77. PolicyholderAddressType

Policy holder name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Recipient address line 1	AddressType
ADDR2	Recipient address line 2	AddressType
ADDR3	Recipient address line 3	AddressType
CITY	Recipient city	AddressType
STATE	Recipient state abbreviation	StateType

Tag	Description	Type
POSTALCODE	Recipient ZIP code	ZipType
POLICYHOLDERNAME1	Policy holder name line 1	GenericNameType
POLICYHOLDERNAME2	Policy holder name line 2	GenericNameType

2.78. ProceedDescription_V100

Sale proceeds description and detail information

Tag	Description	Type
FORM8949CODE	Applicable checkbox on Form 8949	CharType
DTAQD	Date acquired	DateTimeType
DTVAR	Various dates acquired	BooleanType
DTSALE	Date of sale	DateTimeType
SECNAME	Security name	SecurityNameType
CUSIPNUM	CUSIP number. Added here for TY2025 for both 1099-B and 1099-DA	CusipType
SALEDESCRIPTION	Box 1a. Description of property	anonymous
NUMSHRS	Number of shares	AmountType
COSTBASIS	Box 1e. Cost or other basis	AmountType
SALESPR	Box 1d. Proceeds	AmountType
ACCRUEDMKTDISCOUNT	Code D, a Form 1099-B showing accrued market discount in box 1f. Note: The amount of the adjustment might not be the same as the amount of the discount. New TY16	AmountType
LONGSHORT	Box 2. Term. Long or short.	LongShortEnum
EXPIREDOPTION	Description: Types of expired stock option. New TY21	ExpiredOptionEnum
INVESTMENTSALETYPE	Description: Types of Investment Transactions. New	InvestmentSaleTypeEnum

Tag	Description	Type
	TY21	
ORDINARY	Box 2. Ordinary gain or loss. New TY16	BooleanType
SALECODE	REMOVED FROM TY16 form - OBSOLETE	anonymous
WASHSALE	Obsolete	BooleanType
FEDTAXWH	Box 4. Federal income tax withheld	AmountType
WASHSALELOSSDISALLOWED	Code W, a nondeductible loss from a wash sale	AmountType
ADJUSTMENTAMT	REMOVED FROM FORM TY16	AmountType
NONCOVEREDSECURITY	Box 5. Noncovered security	BooleanType
LOSSNOTALLOWED	Box 7. Loss not allowed based on amount in 1d	BooleanType
BASISNOTSHOWN	Use when supplying cost basis for a non-covered security and NOT reporting on the 1099B	BooleanType
FORM1099BNOTRECEIVED	Not reported on 1099-B	BooleanType
COLLECTIBLE	Code C flag, disposed of collectibles (see the Schedule D instructions). New TY16	BooleanType
MULTIPLETRAN	Code M flag, report multiple transactions on a single row as described in Exception 2 or Special provision for certain corporations, partnerships, securities dealers, and other qualified entities under Exceptions to reporting each transaction on a separate row. Note: When ProceedSummary_V100 used, this code is implied. Added TY19	BooleanType

Tag	Description	Type
INCORRECTGAINTYPE	Code T flag, received a Form 1099-B (or substitute statement) and the type of gain or (loss) shown in box 2 is incorrect. Added TY19	BooleanType
INCORRECTCOSTBASIS	Code B flag, received a Form 1099-B (or substitute statement) and the basis shown in box 1e is incorrect. Added TY19	BooleanType
COSTBASISADJ	Adjustment amount for code B. Added TY19	AmountType
CORRECTEDCOSTBASIS	Corrected cost basis. May be supplied in lieu of COSTBASISADJ. If both COSTBASISADJ and CORRECTEDCOSTBASIS are supplied, COSTBASIS plus COSTBASISADJ should equal CORRECTEDCOSTBASIS. Added TY20	AmountType
EXPENSEADJ	Code E, received a Form 1099-B or 1099-S (or substitute statement) for a transaction and there are selling expenses or option premiums that aren't reflected on the form or statement by an adjustment to either the proceeds or basis shown. Added TY19	AmountType
HOMESALEADJ	Code H, sold or exchanged main home at a gain, must report the sale or exchange on Part II of Form 8949 (as explained in Sale of Your Home in the Instructions for Schedule D (Form 1040)), and can exclude some or all of the	AmountType

Tag	Description	Type
	gain. Added TY19	
OTHERNDLOSSADJ	Code L, a nondeductible loss other than a loss indicated by code W. Added TY19	AmountType
NOMINEEADJ	Code N, received a Form 1099-B or 1099-S (or substitute statement) as a nominee for the actual owner of the property. Added TY19	AmountType
OTHERADJ	Code O, Adjustment not explained by any other adjustment type. Comment updated TY21	AmountType
QUALSMBSTOCKADJ	Code Q, sold or exchanged qualified small business stock and can exclude part of the gain. Added TY19	AmountType
ROLLOVERADJ	Code R, electing to postpone all or part of your gain under the rules explained in the Schedule D instructions for any rollover of gain (for example, rollover of gain from QSB stock). Added TY19	AmountType
S1244MAXADJ	Code S, had a loss from the sale, exchange, or worthlessness of small business (section 1244) stock and the total loss is more than the maximum amount that can be treated as an ordinary loss. Added TY19	AmountType
DCQCAADJ	Code X, can exclude all or part of your gain under the rules explained in the Schedule D instructions for DC Zone assets or qualified community assets.	AmountType

Tag	Description	Type
	Added TY19	
QOFADJ	Code Z, electing to postpone all or part of your gain under the rules explained in the Schedule D instructions for investments in QO Fund(s). Added TY19	AmountType
TOTALADJ	Total of adjustments to be reported on Form 8949, column (g), Amount of adjustment. Recommended for use when ADJCODES contains codes that indicate amounts (i.e. other than codes M and T). Added TY20	AmountType
ADJCODES	String of code(s) to be reported on Form 8949, column (f), code(s) from instructions. When containing codes that indicate amounts (i.e. other than codes M and T), enter the total in TOTALADJ. Possible codes include B T N H D Q X R W L E S C M O and Z. See https://www.irs.gov/instructions/i8949 for list of codes. Added TY20	ProceedsSummaryAdjustmentCodeType
QOF	Box 3. Qualified Opportunity Fund flag. New TY19.	BooleanType
STATECODE	2 DIGIT STATE CODE	StateCodeType
STATEIDNUM	PAYER STATE ID NUMBER	IdType
STATETAXWHELD	State income tax withheld	AmountType
STATECODE2	STATE CODE (2)	StateCodeType
STATEIDNUM2	PAYER STATE ID NUMBER(2)	IdType
STATETAXWHELD2	STATE TX WHELD (2)	AmountType

Tag	Description	Type
ADDLSTATETAXWHAGG+	For additional states beyond 1 and 2. Cleanup TY19.	AddlStateTaxWheldAggregate
FATCA	New TY16	BooleanType
SBGROS	Cleanup TY19.	BooleanType
SBGROSLESS	Cleanup TY19.	BooleanType

2.79. ProceedSummary_V100

Sale Proceeds Summary Information

Tag	Description	Type
FORM8949CODE	Applicable checkbox on Form 8949	CharType
ADJCODE	Adjustment code	ProceedsSummaryAdjustment CodeType
SUMCOSTBASIS	Box 1e. Cost	AmountType
SUMSALESPR	Box 1d. Proceeds	AmountType
SUMADJAMT	Adjustment amount	AmountType
SUMDESCRIPTION	Box 1a. Description	anonymous

2.80. ProfileMessageSet

Profile Message Set

Tag	Description	Type
PROFMSGSETV1	Profile message set	ProfileMessageSetV1

2.81. ProfileMessageSetV1

Profile Message Set

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore

2.82. ProfileRequest

Profile Request

Tag	Description	Type
CLIENTROUTING	Client Routing	ClientRoutingEnum
DTPROFUP	Date and time	DateTimeType

2.83. ProfileRequestMessageSetV1

Profile Request Message Set

Tag	Description	Type
PROFTRNRQ	Profile request	ProfileTransactionRequest

2.84. ProfileResponse

Profile Response

Tag	Description	Type
MSGSETLIST	Message set list	MessageSetList
SIGNONINFOLIST	Sign on information list	SignonInfoList
DTPROFUP	Date and time	DateTimeType
FINAME	Institution Name	GenericNameType
ADDR1	Address line 1	AddressType
ADDR2	Address line 3	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
COUNTRY	Country	CountryType
CSPHONE	Phone number	PhoneType
TSPHONE	Phone number	PhoneType
FAXPHONE	Facsimile machine phone	PhoneType

Tag	Description	Type
	number	
URL	Uniform resource locator	UrlType
EMAIL	Email	ShortMessageType

2.85. ProfileResponseMessageSetV1

Profile Response Message Set

Tag	Description	Type
PROFTRNRS	Profile response	ProfileTransactionResponse

2.86. ProfileTransactionRequest

Profile Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Client cookie	IdType
TAN	Transaction authorization number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
PROFRQ	Profile request	ProfileRequest

2.87. ProfileTransactionResponse

Profile Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status	Status
CLTCOOKIE	Client cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
PROFRS	Profile response	ProfileResponse

2.88. Recipient1097AddressType

1097 Recipient Name and Address

Tag	Description	Type
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
RECIPNAME1	Recipient name line 1	GenericNameType
RECIPNAME2	Recipient name line 2	GenericNameType

2.89. RecipientAddress

Recipient Name and Address

Tag	Description	Type
RECNAME1	Recipient name 1	GenericNameType
RECNAME2	Recipient name 2	GenericNameType
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType

2.90. RecipientAddressType

Recipient name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Recipient address line 1	AddressType
ADDR2	Recipient address line 2	AddressType
ADDR3	Recipient address line 3	AddressType
CITY	Recipient city	AddressType
STATE	Recipient state abbreviation	StateType
POSTALCODE	Recipient ZIP code	ZipType
RECIPNAME1	Recipient name line 1	GenericNameType
RECIPNAME2	Recipient name line 2	GenericNameType

2.91. RecipientInfo

Recipient Information

Tag	Description	Type
RECIPIENTNAME	Recipient name	GenericNameType
SSN	Recipient social security number	GenericNameType
DOB	IF the SSN is unknown you must provide the Date of Birth	DateTimeType
SPOUSENAME	Spouse name	GenericNameType
SPOUSESSN	Spouse social security number	GenericNameType
SPOUSEDOB	If SpouseSSN unknown, you must provide the spouse DOB	DateTimeType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
CITY	City	AddressType

Tag	Description	Type
STATE	State abbreviation (e.g. NY)	StateType
POSTALCODE	ZIP or foreign postal code	ZipType
COUNTRYSTRING	Country	CountryStringType

2.92. SharedLevelForeignIncomeAndExpense

K-1 Supplement detail entry for forms 1065 box 16 and 1120S box 14, Foreign transactions, Partner or Shareholder (codes C, I and J) or form 1041 box 14 Beneficiary level (code B) foreign income and expense

Tag	Description	Type
K1CODE	Code, if needed, for additional amount	GenericNameType
GROSSINCOMEATSHAREDLEVEL	Gross income sourced at the shared level	AmountType
INTEXPENSEATSHAREDLEVEL	Interest expense allocated at the shared level	AmountType
OTHEREXPENSESATSHAREDLEVEL	Other expenses allocated at the shared level	AmountType

2.93. Shareholder2439AddressType

Shareholder Name and Address

Tag	Description	Type
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
SHAREHOLDERNAME1	Shareholder name line 1	GenericNameType
SHAREHOLDERNAME2	Shareholder name line 2	GenericNameType

2.94. ShareholderAddressType

Shareholder name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Recipient address line 1	AddressType
ADDR2	Recipient address line 2	AddressType
ADDR3	Recipient address line 3	AddressType
CITY	Recipient city	AddressType
STATE	Recipient state abbreviation	StateType
POSTALCODE	Recipient ZIP code	ZipType
SHAREHOLDERNAME1	Shareholder name line 1	GenericNameType
SHAREHOLDERNAME2	Shareholder name line 2	GenericNameType

2.95. SignonInfo

Sign on Information

Tag	Description	Type
SIGNONREALM	Sign on realm	GenericNameType
MIN	Minimum	MAXMINType
MAX	Maximum	MAXMINType
CHARTYPE	Character type	CharTypeEnum
CASESEN	Case sensitive	BooleanType
SPECIAL	Special	BooleanType
SPACES	Spaces	BooleanType
PINCH	PIN Change	BooleanType
CHGPINFIRST	Change PIN first time	BooleanType
USERCRED1LABEL	User credentials label 1	MFATextType
USERCRED2LABEL	User credentials label 2	MFATextType

Tag	Description	Type
CLIENTUIDREQ	Client ID request	BooleanType
AUTHTOKENFIRST	Authorization token first time	BooleanType
AUTHTOKENLABEL	Authorization token label	MFATextType
AUTHTOKENINFOURL	Authorization token information URL	MFAUrlType
MFACHALLENGESUPT	MFA challenge supported	BooleanType
MFACHALLENGEFIRST	MFA challenge first time	BooleanType
ACCESSTOKENREQ	Access token request	BooleanType

2.96. SignonInfoList

Sign on information list

Tag	Description	Type
SIGNONINFO+	Sign on information	SignonInfo

2.97. SignonMessageSet

Sign on Message Set

Tag	Description	Type
SIGNONMSGSETV1	Sign on message	SignonMessageSetV1

2.98. SignonMessageSetV1

Sign on Message Set"

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore

2.99. SignonRequest

Sign on Request

Tag	Description	Type
DTCLIENT	Date and time	DateTimeType

Tag	Description	Type
USERID	User ID	IdType
USERPASS	User password	PasswordType
USERKEY	User key	UserKeyType
ACCESSTOKEN	Access token	AccessTokenType
GENUSERKEY	Generate user key	BooleanType
LANGUAGE	Language	LanguageEnum
FI	Financial institution	FinancialInstitution
SESSCOOKIE	Session cookie	SessionCookieType
APPID	Application ID	ApplicationIdType
APPVER	Application version	IntegerType
APPKEY	Application key	AppKeyType
CLIENTUID	Client ID	ClientUidType
USERCRED1	User credentials 1	UserCredType
USERCRED2	User credentials 2	UserCredType
AUTHTOKEN	Authorization token	AuthTokenType
ACCESSKEY	Access key	AccessKeyType
MFACHALLENGEANSWER+	MFA challenge answer	MFAChallengeAnswer
OFXEXTENSION	Extended information	OFXExtensionType

2.100. SignonRequestMessageSetV1

Signon Request Message Set

Tag	Description	Type
SONRQ	Sign on request	SignonRequest
PINCHTRNRQ	PIN change request	PinChangeTransactionRequest
CHALLENGETRNRQ	Challenge request	ChallengeTransactionRequest

2.101. SignonResponse

Signon Response

Tag	Description	Type
STATUS	Status	Status
DTSERVER	Date and time	DateTimeType
USERKEY	User key	UserKeyType
TSKEYEXPIRE	Expiration date and time	DateTimeType
LANGUAGE	Language	LanguageEnum
DTPROFUP	Profile update date and time	DateTimeType
DTUSERUP	User update date and time	DateTimeType
DTACCTUP	Account update date and time	DateTimeType
FI	Financial institution	FinancialInstitution
SESSCOOKIE	Session cookie	SessionCookieType
ACCESSKEY	Access key	AccessKeyType
OFXEXTENSION	Extended information	OFXExtensionType

2.102. SignonResponseMessageSetV1

Signon Response Message Set

Tag	Description	Type
SONRS	Sign on response	SignonResponse
PINCHTRNRS	PIN change response	PinChangeTransactionResponse
CHALLENGETRNRS	Challenge response	ChallengeTransactionResponse

2.103. StateExemptIncomeDetails

State Exempt Income Details. New for TY2026

Tag	Description	Type
STATECODE	State code e.g. CA for California.	StateCodeType

Tag	Description	Type
STATEPERCENTAGE	This state's percent of total e.g. 16.49 for 16.49%.	RateType
STATEAMT	Calculated as this state's STATEPERCENTAGE times the fund's EXEMPTAMT.	AmountType

2.104. StateInfo

State Information

Tag	Description	Type
STATECODE	State abbreviation	StateCodeType
EMPLOYERSTID	Employer’s state ID number	IdType
STATEWAGES	State wages, tips, etc	AmountType
STATETAXWH	State income tax withheld	AmountType

2.105. StateTaxWithheldAggregate

State Tax Withheld Information

Tag	Description	Type
AMOUNT	Amount	AmountType
PAYERSTATE	State abbreviation	StateCodeType
PAYERSTID	State ID number	IdType
STDIST	State distribution amount	AmountType

2.106. Status

Status information

Tag	Description	Type
CODE	Status code	ErrorType
SEVERITY	Severity	SeverityEnum
MESSAGE	Message text	MessageType

2.107. StocksBonds

Stocks and Bonds

Tag	Description	Type
STKBNDAMT	Stock or bond amount	AmountType
SBGROS	Gross	BooleanType
SBGROSLESS	Net	BooleanType

2.108. StudentAddress

Tag	Description	Type
STUDENTNAME	Student name	GenericNameType
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City/town	AddressType
STATE	State/province abbreviation	StateType
POSTALCODE	ZIP/foreign code	ZipType
COUNTRYSTRING	Country	CountryStringType

2.109. Tax1041K1Supplemental_V100

Form 1041 K-1 Supplemental Information

Tag	Description	Type
SRVRTID	ID assigned by server to document	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType

Tag	Description	Type
INTEREST	Interest income	AmountType
ORDINARYDIVIDEND	Ordinary dividends	AmountType
QUALIFIEDDIVIDEND	Qualified dividends	AmountType
INTERESTANDDIVIDENDDETAIL	Interest and dividend detail	InterestAndDividendDetail
UNRECAP1250GAIN	Unrecaptured section 1250 gain	AmountType
UNRECAPSEC1250GAINDETAIL	Unrecaptured section 1250 gain detail	UnrecapturedSection1250GainDetail
CREDITS+	Credits	CodeAmountType
CREDITSDETAIL	Credits detail	CreditsDetail
AMTITEMS+	Alternative minium tax items	CodeAmountType
AMTITEMSDETAIL	Alternative minimum tax items details	AlternativeMinimumTaxDetail
OTHERINFO+	Other information	CodeAmountType
OTHERINFODETAIL	Other information detail	OtherInfoDetail1041K1
MISCELLANEOUSINFORMATION	K-1 Supplement detail for Miscellaneous Information, not otherwise included on K-1 forms	MiscellaneousInformation
ADDLSUPPLEMENTALDETAIL+	Additional supplemental details for any K-1 boxes or codes	AdditionalOtherAmountType

2.110. Tax1065K1Supplemental_V100

Form 1065 K-1 Supplemental Information

Tag	Description	Type
SRVRTID	ID assigned by server to document	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType

Tag	Description	Type
CORRECTED	Corrected document	BooleanType
INTEREST	Interest income	AmountType
ORDINARYDIVIDEND	Ordinary dividends	AmountType
QUALIFIEDDIVIDEND	Qualified dividends	AmountType
INTERESTANDDIVIDENDDETAIL	Interest and dividend details	InterestAndDividendDetail
GUARANTEDPAYMENT	Guaranteed payments	AmountType
GUARANTEEDPAYMENTDETAIL	Guaranteed payment details	GuaranteedPaymentDetail
UNRECAPSEC1250GAIN	Unrecaptured section 1250 gain	AmountType
UNRECAPSEC1250GAINDETAIL	Unrecaptured section 1250 gain details	UnrecapturedSection1250GainDetail
OTHERINCOMELOSS+	Other income or loss	CodeAmountType
OTHERINCOMELOSSDETAIL	Other income or loss details	OtherIncomeLossDetail
OTHERDEDUCTIONS+	Other deductions	CodeAmountType
OTHERDEDUCTIONSDETAIL	Other deductions details	OtherDeductionsDetail
CREDITS+	Credits	CodeAmountType
CREDITSDETAIL	Credit details	CreditsDetail
FOREIGNTRANSACTIONS+	Foreign transactions	CodeAmountType
FOREIGNTRANSACTIONSDETAIL	Foreign transactions details	ForeignTransactionsDetail
AMTITEMS+	Alternative minimum tax items	CodeAmountType
AMTITEMSDETAIL	Alternative minimum tax details	AlternativeMinimumTaxDetail
TAXEXEMPT+	Tax-exempt income	CodeAmountType
TAXEXEMPTDETAIL	Tax-exempt income detail	TaxExemptAndShareholderBasisDetail
OTHERINFO+	Other information	CodeAmountType
OTHERINFODETAIL	Other information detail	OtherInfoDetail

Tag	Description	Type
OUTSIDEEXPENSESDETAIL	K-1 Supplement detail for Outside Expenses	OutsideExpensesDetail
ADDLSUPPLEMENTALDETAIL+	Additional supplemental details for any K-1 boxes or codes	AdditionalOtherAmountType

2.111. Tax1095MessageSet

1095 Message Set

Tag	Description	Type
TAX1095MSGSETV1	1095 message set	Tax1095MessageSetV1

2.112. Tax1095MessageSetV1

Tax 1095 Message Set"

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAX1095DNLD	1095 download	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.113. Tax1095Request

1095 Request

Tag	Description	Type
SSN	Social security number	GenericNameType
TAXYEAR+	Tax year	YearType

2.114. Tax1095RequestMessageSetV1

1095 Request Message Set

Tag	Description	Type
TAX1095TRNRQ	1095 transaction request	Tax1095TransactionRequest

2.115. Tax1095Response

1095 Response

Tag	Description	Type
SSN	Social security number	GenericNameType
TAX1095A_V100	Form 1095-A - Health Insurance Marketplace Statement	Tax1095A_V100
TAX1095B_V100	Form 1095-B - Health Coverage	Tax1095B_V100
TAX1095C_V100	Form 1095-C - Employer-Provided Health Insurance Offer and Coverage	Tax1095C_V100

2.116. Tax1095ResponseMessageSetV1

1095 Response Message Set

Tag	Description	Type
TAX1095TRNRS	1095 response	Tax1095TransactionResponse

2.117. Tax1095TransactionRequest

1095 Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
TAX1095RQ	1095 request	Tax1095Request

2.118. Tax1095TransactionResponse

1095 Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status information	Status
CLTCOOKIE	Cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
TAX1095RS	1095 response	Tax1095Response

2.119. Tax1097MessageSet

1097 Message Set

Tag	Description	Type
TAX1097MSGSETV1	1097 message set	Tax1097MessageSetV1

2.120. Tax1097MessageSetV1

Tax 1097 Message Set

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAX1097DNLD	1098 download	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.121. Tax1097Request

1097 Request

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
SSN	Social security number	GenericNameType
TAXYEAR+	Tax year	YearType

2.122. Tax1097RequestMessageSetV1

1097 Request Message Set

Tag	Description	Type
TAX1097TRNRQ	1097 request	Tax1097TransactionRequest

2.123. Tax1097Response

1097 Response

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
SSN	Social security number	GenericNameType
TAX1097BTC_V100	Form 1097-BTC - Bond Tax Credit	Tax1097BTC_V100

2.124. Tax1097ResponseMessageSetV1

1097 Response Message Set

Tag	Description	Type
TAX1097TRNRS	1097 response	Tax1097TransactionResponse

2.125. Tax1097TransactionRequest

1097 Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
TAX1097RQ	1097 request	Tax1097Request

2.126. Tax1097TransactionResponse

1097 Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status	Status
CLTCOOKIE	Cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
TAX1097RS	1097 response	Tax1097Response

2.127. Tax1098MessageSet

1098 Message Set

Tag	Description	Type
TAX1098MSGSETV1	1098 message set	Tax1098MessageSetV1

2.128. Tax1098MessageSetV1

Tax 1098 Message Set V1

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAX1098DNLD	1098 download	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.129. Tax1098Request

1098 Request

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
SSN	Social security number	GenericNameType
TAXYEAR+	Tax year	YearType
INCLUDEPDFATTACHMENTS	Include PDF attachments	BooleanType

2.130. Tax1098RequestMessageSetV1

1098 Request Message Set

Tag	Description	Type
TAX1098TRNRQ	1098 request	Tax1098TransactionRequest

2.131. Tax1098Response

1098 Response

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
SSN	Social security number	GenericNameType
TAXPDF_V100	PDF form	TaxDocumentAsPDF_V100
TAX1098_V100	Form 1098 - Mortgage Interest Statement	Tax1098_V100
TAX1098T_V100	Form 1098-T - Tuition Statement	Tax1098T_V100
TAX1098E_V100	Form 1098-E - Student Loan Interest Statement	Tax1098E_V100
TAX1098C_V100	Form 1098-C - Contributions of Motor Vehicles, Boats, and Airplanes	Tax1098C_V100
TAX1098VLI_V100	Form 1098-VLI - Vehicle Loan Interest Statement. New TY26.	Tax1098VLI_V100

2.132. Tax1098ResponseMessageSetV1

1098 Response Message Set

Tag	Description	Type
TAX1098TRNRS	1098 response	Tax1098TransactionResponse

2.133. Tax1098TransactionRequest

1098 Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
TAX1098RQ	1098 request	Tax1098Request

2.134. Tax1098TransactionResponse

1098 Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status information	Status
CLTCOOKIE	Cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
TAX1098RS	1098 response	Tax1098Response

2.135. Tax1099ConsolidatedStatementInfo

Various tax-related items reported on consolidated brokerage or mutual fund statements not on the base forms. Added TY19

Tag	Description	Type
SRVRTID	ID assigned to document by server	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
MARGININTERESTPAID	Margin interest paid	AmountType
PAYMENTINLIEUPAID	Payment in lieu of dividend	AmountType

Tag	Description	Type
ADVISORFEESPAID	Advisor fees paid	AmountType
OTHERFEESPAID	Other fees paid	AmountType
CORPORATEBONDINTPAID	Accrued Interest Paid offset to form 1099-INT box 1, Corporate bond interest income	AmountType
INTUSBNDTRSPAID	Accrued Interest Paid offset to form 1099-INT box 3, accrued U.S. Treasury Notes and Bonds interest income	AmountType
TAXEXEMPTINTPAID	Accrued Interest Paid offset to form 1099-INT box 8, tax exempt interest income from municipal bonds	AmountType
SPECIFIEDPABINTPAID	Accrued Interest Paid offset to form 1099-INT box 9, tax exempt interest income from private activity bonds	AmountType

2.136. Tax1099MessageSet

1099 Message Set

Tag	Description	Type
TAX1099MSGSETV1	1099 message set	Tax1099MessageSetV1

2.137. Tax1099MessageSetV1

Tax 1099 Message Set

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAX1099DNLD	1099 download	BooleanType
EXTD1099B	Extended 1099-B	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.138. Tax1099Request

1099 Request

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
RECID	Recipient ID	IdType
TAXYEAR+	Tax year	YearType
INCLUDEPDFATTACHMENTS	Include PDF attachments	BooleanType

2.139. Tax1099RequestMessageSetV1

1099 Request Message Set

Tag	Description	Type
TAX1099TRNRQ	1099 request	Tax1099TransactionRequest

2.140. Tax1099Response

1099 Response

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
RECID	Recipient ID	IdType
FIDIRECTDEPOSITINFO+	Direct deposit information	FIDirectDepositInfo
TAX1099CONSOLIDATEDSTMTINFO+	Various tax-related items reported on consolidated brokerage or mutual fund statements not on the base forms. Added TY19.	Tax1099ConsolidatedStatementInfo
TAXPDF_V100	PDF document	TaxDocumentAsPDF_V100
TAX1099MISC_V100	1099-MISC - Miscellaneous Income	Tax1099MISC_V100
TAX1099R_V100	1099-R - Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance	Tax1099R_V100

Tag	Description	Type
	Contracts, etc.	
TAX1099B_V100	1099-B - Proceeds From Broker and Barter Exchange Transactions	Tax1099B_V100
TAX1099INT_V100	1099-INT - Interest Income	Tax1099INT_V100
TAX1099DIV_V100	1099-DIV - Dividends and Distributions	Tax1099DIV_V100
TAX1099OID_V100	1099-OID - Original Issue Discount	Tax1099OID_V100
TAX1099A_V100	1099-A - Acquisition or Abandonment of Secured Property	Tax1099A_V100
TAX1099C_V100	1099-C - Cancellation of Debt	Tax1099C_V100
TAX1099CAP_V100	1099-CAP - Changes in Corporate Control and Capital Structure	Tax1099CAP_V100
TAX1099G_V100	1099-G - Certain Government Payments	Tax1099G_V100
TAX1099H_V100	1099-H - Health Coverage Tax Credit (HCTC) Advance Payments	Tax1099H_V100
TAX1099K_V100	1099-K - Merchant Card and Third-Party Network Payments	Tax1099K_V100
TAX1099LTC_V100	1099-LTC - Long-Term Care and Accelerated Death Benefits	Tax1099LTC_V100
TAX1099PATR_V100	1099-PATR - Taxable Distributions Received From Cooperatives	Tax1099PATR_V100
TAX1099Q_V100	1099-Q - Payments From Qualified Education Programs	Tax1099Q_V100
TAX1099S_V100	1099-S - Proceeds From Real Estate Transactions	Tax1099S_V100

Tag	Description	Type
TAX1099SA_V100	1099-SA - Distributions From an HSA, Archer MSA, or Medicare Advantage MSA	Tax1099SA_V100
TAX1099NEC_V100	1099-NEC - Nonemployee Compensation	Tax1099NEC_V100
TAX1099DA_V100	1099-DA - Digital Asset Proceeds From Broker Transactions	Tax1099DA_V100

2.141. Tax1099ResponseMessageSetV1

1099 Response Message Set

Tag	Description	Type
TAX1099TRNRS	1099 response	Tax1099TransactionResponse

2.142. Tax1099TransactionRequest

1099 Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
TAX1099RQ	1099 request	Tax1099Request

2.143. Tax1099TransactionResponse

1099 Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status information	Status
CLTCOOKIE	Cookie	IdType

Tag	Description	Type
OFXEXTENSION	Extended information	OFXExtensionType
TAX1099RS	1099 response	Tax1099Response

2.144. Tax1120SK1Supplemental_V100

Form 1120-S K-1 Supplemental Information

Tag	Description	Type
SRVRTID	ID assigned by server to document	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
INTEREST	Interest	AmountType
ORDINARYDIVIDEND	Ordinary dividends	AmountType
QUALIFIEDDIVIDEND	Qualified dividends	AmountType
INTERESTANDDIVIDENDDETAIL	Interest and dividend detail	InterestAndDividendDetail
UNRECAPSEC1250GAIN	Unrecaptured section 1250 gain	AmountType
UNRECAPSEC1250GAINDETAIL	Unrecaptured section 1250 gain detail	UnrecapturedSection1250GainDetail
OTHERINCOMELOSS+	Other income or loss	CodeAmountType
OTHERINCOMELOSSDETAIL	Other income or loss detail	OtherIncomeLossDetail
OTHERDEDUCTIONS+	Other deductions	CodeAmountType
OTHERDEDUCTIONSDETAIL	Other deductions detail	OtherDeductionsDetail
CREDITS+	Credits	CodeAmountType
CREDITSDETAIL	Credits detail	CreditsDetail
FOREIGNTRANSACTIONS+	Foreign transactions	CodeAmountType
FOREIGNTRANSACTIONSDETAIL	Foreign transaction detail	ForeignTransactionsDetail

Tag	Description	Type
AMTITEMS+	Alternative minimum tax items	CodeAmountType
AMTITEMSDETAIL	Alternative minimum tax detail	AlternativeMinimumTaxDetail
ITEMSAFFECTINGSHAREHOLDERBASIS+	Basis information	CodeAmountType
ITEMSAFFECTINGSHRHOLDERBASISDETAIL	Basis information detail	TaxExemptAndShareholderBasisDetail
OTHERINFO+	Other information	CodeAmountType
OTHERINFODETAIL	Other information detail	OtherInfoDetail
ADDLSUPPLEMENTALDETAIL+	Additional supplemental details for any K-1 boxes or codes	AdditionalOtherAmountType

2.145. Tax2439MessageSet

2439 message set

Tag	Description	Type
TAX2439MSGSETV1	2439 message set	Tax2439MessageSetV1

2.146. Tax2439MessageSetV1

2439 message set

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAX2439DNLD	2439 download	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.147. Tax2439Request

2439 Request

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
SSN	Social security number	GenericNameType

Tag	Description	Type
TAXYEAR+	Tax year	YearType

2.148. Tax2439RequestMessageSetV1

2439 Request Message Set

Tag	Description	Type
TAX2439TRNRQ	2439 request	Tax2439TransactionRequest

2.149. Tax2439Response

2439 Response

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
SSN	Social security number	GenericNameType
TAX2439_V100	Form 2439 - Notice to Shareholder of Undistributed Long-Term Capital Gains	Tax2439_V100

2.150. Tax2439ResponseMessageSetV1

2439 Response Message Set

Tag	Description	Type
TAX2439TRNRS	2439 response	Tax2439TransactionResponse

2.151. Tax2439TransactionRequest

2439 Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType

Tag	Description	Type
TAX2439RQ	2439 request	Tax2439Request

2.152. Tax2439TransactionResponse

2439 Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status	Status
CLTCOOKIE	Cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
TAX2439RS	2439 response	Tax2439Response

2.153. Tax5227K1Supplemental_V100

5227 K-1 supplemental information

Tag	Description	Type
SRVRTID	ID assigned by server to document	ServerIdType
TAXYEAR	Tax year	YearType
VOID	Voided document	BooleanType
CORRECTED	Corrected document	BooleanType
INTEREST	Interest income	AmountType
ORDINARYDIVIDEND	Ordinary dividends	AmountType
QUALIFIEDDIVIDEND	Qualified dividends	AmountType
INTERESTANDDIVIDENDDETAIL	Interest and dividend detail	InterestAndDividendDetail
UNRECAP1250GAIN	Unrecaptured section 1250 gain	AmountType
UNRECAPSEC1250GAINDETAIL	Unrecaptured section 1250 gain detail	UnrecapturedSection1250GainDetail
CREDITS+	Credits	CodeAmountType

Tag	Description	Type
CREDITSDETAIL	Credits detail	CreditsDetail
AMTITEMS+	Alternative minium tax items	CodeAmountType
AMTITEMSDETAIL	Alternative minimum tax items details	AlternativeMinimumTaxDetail
OTHERINFO+	Other information	CodeAmountType
OTHERINFODETAIL	Other information detail	OtherInfoDetail1041K1
MISCELLANEOUSINFORMATION	K-1 Supplement detail for Miscellaneous Information, not otherwise included on K-1 forms	MiscellaneousInformation
ADDLSUPPLEMENTALDETAIL+	Additional supplemental details for any K-1 boxes or codes	AdditionalOtherAmountType

2.154. Tax5498MessageSet

5498 Message Set

Tag	Description	Type
TAX5498MSGSETV1	5498 message set	Tax5498MessageSetV1

2.155. Tax5498MessageSetV1

5498 Message Set

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAX5498DNLD	5498 download	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.156. Tax5498Request

5498 Request

Tag	Description	Type
ACCTNUM	Account number	AccountIdType

Tag	Description	Type
SSN	Social security number	GenericNameType
TAXYEAR+	Tax year	YearType

2.157. Tax5498RequestMessageSetV1

5498 Request Message Set

Tag	Description	Type
TAX5498TRNRQ	5498 request	Tax5498TransactionRequest

2.158. Tax5498Response

Tax 5498 Response

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
SSN	Social security number	GenericNameType
TAX5498_V100	Form 5498 - IRA Contribution Information	Tax5498_V100
TAX5498ESA_V100	Form 5498-ESA - Coverdell ESA Contribution Information	Tax5498ESA_V100
TAX5498SA_V100	Form 5498-SA - HSA, Archer MSA, or Medicare Advantage MSA Information	Tax5498SA_V100
TAX5498TA_V100	Form 5498-TA - Trump Account. New TY26.	Tax5498TA_V100

2.159. Tax5498ResponseMessageSetV1

5498 Response Message Set

Tag	Description	Type
TAX5498TRNRS	5498 response	Tax5498TransactionResponse

2.160. Tax5498TransactionRequest

5498 Transaction Request

Tag	Description	Type
TRNUID	Unique ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
TAX5498RQ	5498 request	Tax5498Request

2.161. Tax5498TransactionResponse

5498 Transaction Response

Tag	Description	Type
TRNUID	Unique ID	GloballyUniqueUserIdType
STATUS	Status information	Status
CLTCOOKIE	Cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
TAX5498RS	5498 response	Tax5498Response

2.162. TaxDocumentAsPDF_V100

PDF delivery of tax documents

Tag	Description	Type
SRVRTID	Document ID assigned by server	ServerIdType
TAXYEAR	Tax year	YearType
PDFCATEGORY	Category of the PDF attachment. For use in specifying tax software documents, send one of: Form8288-A or Form1120-F-FIRPTACredit Form8805 or Form1120-F-FIRPTACredit	anonymous

Tag	Description	Type
	Form1128 Form2439 Form2553 Form3115 Form4466 Form461	
PDFDESCRIPTION	Per page 41 of Pub 4164, "The 'Description' element in the BinaryAttachment.xsd cannot exceed 128 characters". Certain form descriptions are exactly specified by the IRS, see https://www.irs.gov/pub/irs-pdf/p4164.pdf and https://www.irs.gov/pub/irs-schema/ty2018_recommended_names_for_PDF_files_by_form.pdf.	anonymous
PDFFILENAME	Per page 41 of Pub 4164, "The name of each PDF file cannot exceed 64 characters", https://www.irs.gov/pub/irs-pdf/p4164.pdf. See https://www.irs.gov/pub/irs-schema/ty2018_recommended_names_for_PDF_files_by_form.pdf	anonymous
PDFCONTENT	Per page 41 of Pub 4164, "Each individual PDF cannot exceed 60 megabytes uncompressed", https://www.irs.gov/pub/irs-pdf/p4164.pdf. Since Base64 string lengths are 4/3 of original binary file length, maxLength here is 80Mb = 83886080.	anonymous

2.163. TaxExemptAndShareholderBasisDetail

K-1 Supplement detail for 1065 box 18: Tax-exempt income and nondeductible expenses; and 1120S box 16: Items affecting shareholder basis

Tag	Description	Type

Tag	Description	Type
STATETAXEXEMPTINTINCOME+	State codes (in DESC field) and amounts of tax-exempt interest income	AdditionalAmountType

2.164. TaxExemptIncomeStateAllocation

Tax Exempt Income State Allocation. New for TY2026

Tag	Description	Type
FUNDNAME	This fund's name e.g. ISHARES TR NATIONAL MUN ETF.	LongMessageType
EXEMPTAMT	This fund's total exempt interest dividend amount.	AmountType
STATEDETAILS+	This fund's published list of exempt percentages, with taxpayer exempt amount (optional), by state.	StateExemptIncomeDetails

2.165. TaxK1MessageSet

K-1 Message Set

Tag	Description	Type
TAXK1MSGSETV1	K-1 message set	TaxK1MessageSetV1

2.166. TaxK1MessageSetV1

K-1 Message Set"

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAXK1DNLD	K-1 download	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.167. TaxK1Request

K-1 Request

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
RECID	Recipient ID	IdType
TAXYEAR+	Tax year	YearType

2.168. TaxK1RequestMessageSetV1

K-1 Request Message Set

Tag	Description	Type
TAXK1TRNRQ	K-1 request	TaxK1TransactionRequest

2.169. TaxK1Response

K-1 Response

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
RECID	Recipient ID	IdType
TAX1065K1_V100	1065 K-1	Tax1065K1_V100
TAX1065K1SUPPLEMENTAL_V100	1065 K-1 Supplemental information	Tax1065K1Supplemental_V100
TAX1120SK1_V100	1120-S K-1	Tax1120SK1_V100
TAX1120SK1SUPPLEMENTAL_V100	1120-S K-1 supplemental information	Tax1120SK1Supplemental_V100
TAX1041K1_V100	1041 K-1	Tax1041K1_V100
TAX1041K1SUPPLEMENTAL_V100	1041 K-1 supplemental information	Tax1041K1Supplemental_V100
TAX5227K1_V100	5227 K-1	Tax5227K1_V100
TAX5227K1SUPPLEMENTAL_V100	5227 K-1 supplemental information	Tax5227K1Supplemental_V100

2.170. TaxK1ResponseMessageSetV1

K-1 Response Message Set

Tag	Description	Type
TAXK1TRNRS	K-1 response	TaxK1TransactionResponse

2.171. TaxK1TransactionRequest

K-1 Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
TAXK1RQ	K-1 request	TaxK1Request

2.172. TaxK1TransactionResponse

K-1 Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status information	Status
CLTCOOKIE	Cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
TAXK1RS	K-1 response	TaxK1Response

2.173. TaxPDFMessageSet

Tax PDF Message Set

Tag	Description	Type
TAXPDFMSGSETV1	PDF message set	TaxPDFMessageSetV1

2.174. TaxPDFMessageSetV1

PDF message set

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAXPDFDNLD	PDF download	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.175. TaxPDFRequest

PDF Request

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
SSN	Social security number	GenericNameType
TAXYEAR+	Tax year	YearType
PDFCATEGORY	Category of the PDF attachment. For use in specifying tax software documents, send one of: Form8288-A or Form1120-F-FIRPTACredit Form8805 or Form1120-F-FIRPTACredit Form1128 Form2439 Form2553 Form3115 Form4466 Form461	anonymous

2.176. TaxPDFRequestMessageSetV1

PDF Request Message Set

Tag	Description	Type
TAXPDFTRNRQ	PDF request	TaxPDFTransactionRequest

2.177. TaxPDFResponse

PDF Response

Tag	Description	Type
ACCTNUM	Account number	AccountIdType
SSN	Social security number	GenericNameType
TAXPDF_V100	PDF form	TaxDocumentAsPDF_V100

2.178. TaxPDFResponseMessageSetV1

PDF Response Message Set

Tag	Description	Type
TAXPDFTRNRS	PDF response	TaxPDFTransactionResponse

2.179. TaxPDFTransactionRequest

PDF Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
TAXPDFRQ	PDF request	TaxPDFRequest

2.180. TaxPDFTransactionResponse

PDF Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status	Status
CLTCOOKIE	Cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
TAXPDFRS	PDF response	TaxPDFResponse

2.181. TaxW2GMessageSet

W-2G message set

Tag	Description	Type
TAXW2GMSGSETV1	W-2G message set	TaxW2GMessageSetV1

2.182. TaxW2GMessageSetV1

W-2G message set

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAXW2GDNLD	W-2G download	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.183. TaxW2GRequest

W-2G Request

Tag	Description	Type
TAXYEAR+	Tax year	YearType

2.184. TaxW2GRequestMessageSetV1

W-2G Request Message Set

Tag	Description	Type
TAXW2GTRNRQ	W-2G request	TaxW2GTransactionRequest

2.185. TaxW2GResponse

W-2G Response

Tag	Description	Type
TAXW2G_V100+	Form W-2G - Certain Gambling Winnings	TaxW2G_V100

2.186. TaxW2GResponseMessageSetV1

W-2G Response Message Set

Tag	Description	Type
TAXW2GTRNRS	W-2G response	TaxW2GTransactionResponse

2.187. TaxW2GTransactionRequest

W-2G Transaction Request

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Extended information	OFXExtensionType
TAXW2GRQ	W-2G request	TaxW2GRequest

2.188. TaxW2GTransactionResponse

W-2G Transaction Response

Tag	Description	Type
TRNUID	Transaction ID	GloballyUniqueUserIdType
STATUS	Status	Status
CLTCOOKIE	Cookie	IdType
OFXEXTENSION	Extended information	OFXExtensionType
TAXW2GRS	W-2G response	TaxW2GResponse

2.189. TaxW2MessageSet

W-2 Message Set

Tag	Description	Type
TAXW2MSGSETV1	W-2 message set	TaxW2MessageSetV1

2.190. TaxW2MessageSetV1

W-2 Message Set

Tag	Description	Type
MSGSETCORE	Common message set information	MessageSetCore
TAXW2DNLD	W-2 download	BooleanType
TAXYEARSUPPORTED+	Tax years supported	YearType

2.191. TaxW2Request

W-2 Request

Tag	Description	Type
SSN	Social security number	GenericNameType
TAXYEAR+	Tax year	YearType

2.192. TaxW2RequestMessageSetV1

W-2 Request Message Set

Tag	Description	Type
TAXW2TRNRQ	W-2 request	TaxW2TransactionRequest

2.193. TaxW2Response

W-2 Response

Tag	Description	Type
SSN	Social security number	GenericNameType
TAXW2_V100	W-2 version 100. Obsolete	TaxW2_V100
TAXW2_V200	W-2 information	TaxW2_V200
TAXW2C_V200	W-2c information	TaxW2C_V200

2.194. TaxW2ResponseMessageSetV1

W-2 Response Message Set

Tag	Description	Type
TAXW2TRNRS	W-2 response	TaxW2TransactionResponse

2.195. TaxW2TransactionRequest

W-2 Transaction Request

Tag	Description	Type
TRNUID	Client assigned transaction ID	GloballyUniqueUserIdType
CLTCOOKIE	Cookie	IdType
TAN	Transaction Authorization Number	TransactionAuthorizationNumberType
OFXEXTENSION	Optional additional information. Generally not used.	OFXExtensionType
TAXW2RQ	W-2 request	TaxW2Request

2.196. TaxW2TransactionResponse

W-2 Transaction Response

Tag	Description	Type
TRNUID	Client assigned transaction ID. Echoed back by server.	GloballyUniqueUserIdType
STATUS	Status information	Status
CLTCOOKIE	Cookie	IdType
OFXEXTENSION	Optional additional information. Generally not used in tax.	OFXExtensionType
TAXW2RS	W-2 response	TaxW2Response

2.197. TransferorAddressType

Transferor name and address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no.	AddressType

Tag	Description	Type
	New for TY2026	
ADDR1	Recipient address line 1	AddressType
ADDR2	Recipient address line 2	AddressType
ADDR3	Recipient address line 3	AddressType
CITY	Recipient city	AddressType
STATE	Recipient state abbreviation	StateType
POSTALCODE	Recipient ZIP code	ZipType
TRANSFERORNAME1	Transferor name line 1	GenericNameType
TRANSFERORNAME2	Transferor name line 2	GenericNameType

2.198. TrusteeAddressType

Trustee Name and Address

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType
CITY	City	AddressType
STATE	State abbreviation	StateType
POSTALCODE	ZIP code	ZipType
COUNTRYSTRING	Country	CountryStringType
PHONE	Phone	PhoneType
TRUSTEENAME1	Trustee name line 1	GenericNameType
TRUSTEENAME2	Trustee name line 2	GenericNameType

2.199. USGovernmentSecDetails

US Government Security Details. New for TY2026

Tag	Description	Type
AGENCYTYPE	The type of the government agency, e.g. USTREASURY.	AgencyTypeEnum
SOURCEPERCENTAGE	The percentage of this government agency type.	RateType
SOURCEAMT	The calculated amount of this government agency type.	AmountType

2.200. UnrecapturedSection1250GainDetail

K-1 Supplement detail for 1065 box 9c and 1120S box 8c and 1041 box 4c, Unrecaptured section 1250 gain

Tag	Description	Type
NETSECTION1231GAIN	Unrecaptured section 1250 gain included in net section 1231 gain	AmountType
GAINFROMESTATETRUSTREITORMUTUALFUND	Unrecaptured section 1250 gain included in long-term gain passed through from estate, trust, REIT or mutual fund	AmountType
GAINFROMDISPOSITIONOFPARTNERSHIPINT	Unrecaptured section 1250 gain included in long-term gain from disposition of interest in a partnership	AmountType

2.201. WinnerAddressType

Tag	Description	Type
UNITNUM	Room or suite no. or Apt. no. New for TY2026	AddressType
ADDR1	Address line 1	AddressType
ADDR2	Address line 2	AddressType
ADDR3	Address line 3	AddressType

Tag	Description	Type
CITY	City/town	AddressType
STATE	State/province abbreviation	StateType
POSTALCODE	ZIP/Foreign postal code	ZipType
WINNERNAME1	Winner name line 1	GenericNameType
WINNERNAME2	Winner name line 2	GenericNameType

3. Enumeration Types

3.1. AgencyTypeEnum

Agency Type Enumeration. New for TY2026

Enumerated values:

USTREASURY

FEDHOMELOAN

STUDENTLOAN

TVA

OTHERDIRFED

FEDFARMCREDIT

3.2. BooleanType

Boolean (true or false) type

Enumerated values:

Y

N

3.3. CharTypeEnum

Char Type Enum

Enumerated values:

ALPHAONLY

NUMERICONLY

ALPHAORNUMERIC

ALPHAANDNUMERIC

3.4. ClientRoutingEnum

Client Routing Enum

Enumerated values:

NONE

SERVICE

MSGSET

3.5. ExpiredOptionEnum

Expired Option

Enumerated values:

PURCHASED

GRANTED

3.6. GrossOrNetType

Gross Or Net
Enumerated values:
GROSS
NET

3.7. InvestmentSaleTypeEnum

Investment Sale Type
Enumerated values:
CRYPTOCURRENCY
EMPLOYEESTOCKPURCHASEPLAN
RESTRICTEDSTOCKUNITS
RESTRICTEDSTOCK
INCENTIVESTOCKOPTION
NONQUALIFIEDSTOCKOPTIONS
OTHER

3.8. LanguageEnum

The accepted values are based on the ISO-639 three-letter language codes.
Enumerated values:
AAR ABK ACE ACH ADA AFA AFH AFR AKA AKK ALB ALE ALG AMH ANG APA ARA ARC ARG ARM ARN ARP ART ARW ASM AST ATH AUS AVA AVE AWA AYM AZE BAD BAI BAK BAL BAM BAN BAQ BAS BAT BEJ BEL BEM BEN BER BHO BIH BIK BIN BIS BLA BNT BOS BRA BRE BTK BUA BUG BUL BUR CAD CAI CAR CAT CAU CEB CEL CHA CHB CHE CHG CHI CHK CHM CHN CHO CHP CHR CHU CHV CHY CMC COP COR COS CPE CPF CPP CRE CRP CUS CZE DAK DAN DAR DAY DEL DEN DGR DIN DIV DOI DRA DUA DUM DUT DYU DZO EFI EGY EKA ELX ENG ENM EPO EST EWE EWO FAN FAO FAT FIJ FIN FIU FON FRE FRM FRO FRY FUL FUR GAA GAY GBA GEM GEO GER GEZ GIL GLA GLE GLG GLV GMH GOH GON GOR GOT GRB GRC GRE GRN GUJ GWI HAI HAU HAW HEB HER HIL HIM HIN HIT HMN HMO HUN HUP IBA IBO ICE IDO III IJO IKU ILE ILO INA INC IND INE INH IPK IRA IRO ITA JAV JPN JPR JRB KAA KAB KAC KAL KAM KAN KAR KAS KAU KAW KAZ KBD KHA KHI KHM KHO KIK KIN KIR KMB KOK KOM KON KOR KOS KPE KRO KRU KUA KUM KUR KUT LAD LAH LAM LAO LAT LAV LEZ LIM LIN LIT LOL LOZ LTZ LUA LUB LUG LUI LUN LUO LUS MAC MAD MAG MAH MAI MAK MAL MAN MAO MAP MAR MAS MAY MDR MEN MGA MIC MIN MIS MKH MLG MLT MNC MNI MNO MOH MOL MON MOS MUL MUN MUS MWR MYN NAH NAI NAP NAU NAV NBL NDE NDO NDS NEP NEW NIA NIC NIU NNO NOB NON NOR NSO NUB NYA NYM NYN NYO NZI OCI OJI ORI ORM OSA OSS OTA OTO PAA PAG PAL PAM PAN PAP PAU PEO PER PHI PHN PLI POL PON POR PRA PRO PUS QAA QUE RAJ RAP RAR ROA ROH ROM RUM RUN RUS SAD SAG SAH SAI SAL SAM SAN SAS SAT SCC SCO SCR SEL SEM SGA SGN SHN SID SIN SIO SIT SLA SLO SLV SMA SME SMI SMJ SMN SMO SMS SNA SND SNK SOG SOM SON SOT SPA SRD SRR SSA SSW SUK SUN SUS SUX SWA SWE SYR TAH TAI TAM TAT TEL TEM TER TET TGK TGL THA TIB TIG TIR TIV TKL TLI TMH TOG TON TPI TSI TSN TSO TUK TUM TUP TUR TUT TVL TWI TYV UGA UIG UKR UMB UND URD

UZB VAI VEN VIE VOL VOT WAK WAL WAR WAS WEL WEN WLN WOL XHO YAO YAP YID YOR YPK ZAP ZEN ZHA ZND ZUL ZUN

3.9. LongShortEnum

Long or Short term

Enumerated values:

LONG

SHORT

3.10. MonthCdType

Month Code

Enumerated values:

JAN

FEB

MAR

APR

MAY

JUN

JUL

AUG

SEP

OCT

NOV

DEC

3.11. SecurityEnum

Security Enumeration

Enumerated values:

NONE

TYPE1

3.12. SeverityEnum

Severity Enum

Enumerated values:

INFO

WARN

ERROR

3.13. SyncEnum

Sync Enumeration
Enumerated values:
FULL
LITE

4. Simple Types

4.1. AccessKeyType

Access Key Type

Minimum length: 1

Maximum length: 1000

4.2. AccessTokenType

Access Token Type

Minimum length: 1

Maximum length: 10000

4.3. AccountIdType

Account ID type

Minimum length: 1

Maximum length: 22

4.4. AddressType

Address type

Minimum length: 1

Maximum length: 32

4.5. AgeType

Age Type. Modeled from OFX_Common "DayspanType". New TY20

Minimum length: 1

Maximum length: 3

Pattern: [0-9]+

4.6. AmountType

Minimum length: 1

Maximum length: 32

Pattern: [\+\-]?[0-9]*(([0-9][,\.]?)|([,\.][0-9]))[0-9]*

4.7. AppKeyType

App Key Type

Minimum length: 1

Maximum length: 10000

4.8. ApplicationIdType

Application ID Type
Minimum length: 1
Maximum length: 5

4.9. AuthTokenType
Auth Token Type
Minimum length: 1
Maximum length: 171

4.10. BankIdType
Bank ID type
Minimum length: 1
Maximum length: 9

4.11. CharType
Character type
Minimum length: 1
Maximum length: 1

4.12. ClientUidType
Client Unique ID Type
Minimum length: 1
Maximum length: 36

4.13. ControlNumber
Control Number
Minimum length: 1
Maximum length: 32

4.14. CountType
Count Type. Modeled after type "IntegerType"
Minimum length: 1
Maximum length: 7
Pattern: [0-9]+

4.15. CountryStringType
Country string
Minimum length: 1
Maximum length: 32

4.16. CountryType

The three-letter country code from ISO/DIS-3166.

Minimum length: 1

Maximum length: 3

4.17. CusipType

CUSIP (Committee on Uniform Securities Identification Procedures) identification number

Minimum length: 1

Maximum length: 32

4.18. DateTimeType

Date and time type

Minimum length: 8

Pattern: [0-9]{4}((0[1-9])|(1[0-2]))((0[1-9])|([1-2][0-9])|(3[0-1]))|[0-9]{4}((0[1-9])|(1[0-2]))((0[1-9])|([1-2][0-9])|(3[0-1]))(([0-1][0-9])|(2[0-3]))[0-5][0-9](([0-5][0-9])|(60))|[0-9]{4}((0[1-9])|(1[0-2]))((0[1-9])|([1-2][0-9])|(3[0-1]))(([0-1][0-9])|(2[0-3]))[0-5][0-9](([0-5][0-9])|(60))\.[0-9]{3}|[0-9]{4}((0[1-9])|(1[0-2]))((0[1-9])|([1-2][0-9])|(3[0-1]))(([0-1][0-9])|(2[0-3]))[0-5][0-9](([0-5][0-9])|(60))\.[0-9]{3}(\[[\+\-]?.+(:.+)?\])?

4.19. DigitalAssetCodeType

Digital Asset Code

Minimum length: 1

Maximum length: 32

4.20. DigitalAssetNameType

Digital Asset Name

Minimum length: 1

Maximum length: 120

4.21. DigitalAssetUnitsType

Digital Asset Units Type - supports up to 18 decimal places

Minimum length: 1

Maximum length: 32

Pattern: [0-9]+(\.[0-9]{1,18})?

4.22. ErrorType

Error Type

Minimum length: 1

Maximum length: 6

Pattern: [0-9]+

4.23. FinancialInstitutionCertificateIdType

Financial Institution Certificate ID Type

Minimum length: 1

Maximum length: 64

4.24. FinancialInstitutionIdType

Financial Institution ID type

Minimum length: 1

Maximum length: 32

4.25. GenericDescriptionType

Generic description type"

Minimum length: 1

Maximum length: 32

4.26. GenericNameType

Generic name type

Minimum length: 1

Maximum length: 32

4.27. GloballyUniqueUserIdType

Globally Unique User ID

Minimum length: 1

Maximum length: 36

4.28. IdType

ID type

Minimum length: 1

Maximum length: 32

4.29. InfoType

Info type

Minimum length: 1

Maximum length: 360

4.30. IntegerType

Integer Type

Minimum length: 1

Maximum length: 4

Pattern: [0-9]+

4.31. LongMessageType

Long Message

Minimum length: 1

Maximum length: 2000

4.32. MAXMINType

Maximum or minimum value type

Minimum length: 1

Maximum length: 2

Pattern: [0-9]+

4.33. MFAPhraseType

MFA Phrase Type

Minimum length: 1

Maximum length: 64

4.34. MFATextType

MFA Text Type

Minimum length: 1

Maximum length: 64

4.35. MFAUrlType

MFA URL type

Minimum length: 1

Maximum length: 255

4.36. MessageType

Message Type

Minimum length: 1

Maximum length: 255

4.37. MonthType

Pattern: [0-9]{2}

4.38. NumberNCEType

Number used once (NONCE) type

Minimum length: 1

Maximum length: 16

4.39. PasswordType

Password Type
Minimum length: 1
Maximum length: 171

4.40. PhoneType

Phone Type
Minimum length: 1
Maximum length: 32

4.41. ProceedsSummaryAdjustmentCodeType

Proceeds Summary Adjustment Code Type. Possible codes include B T N H D Q X R W L E S C M O and Z. (As of TY20.) See https://www.irs.gov/pub/irs-pdf/i8949.pdf pages 8 - 10 for further code information.
Minimum length: 1
Maximum length: 9

4.42. RateType

Rate Type
Minimum length: 1
Maximum length: 32
Pattern: [\+\-]?[0-9]*(([0-9][,\.]?)|([,\.][0-9]))[0-9]*

4.43. SecurityNameType

Security Name"
Minimum length: 1
Maximum length: 120

4.44. ServerIdType

Server Id Type
Minimum length: 1
Maximum length: 10

4.45. SessionCookieType

Session Cookie Type
Minimum length: 1
Maximum length: 1000

4.46. ShortMessageType

Short Message Type
Minimum length: 1
Maximum length: 80

4.47. StateCodeType
State Code Type
Minimum length: 1
Maximum length: 2

4.48. StateType
State Type
Minimum length: 1
Maximum length: 5

4.49. TagTypeType
Tag Type
Minimum length: 1
Maximum length: 20

4.50. TagValueType
Tag Value
Minimum length: 1
Maximum length: 10000

4.51. TaxIdType
Tax ID takes up to 11 alphanumeric characters. Hyphens are recommended but not required. Examples: SSN: 123-45-6789 Masked SSN: xxx-xx-6789 EIN: 12-3456789 Masked EIN: xx-xxx6789
Minimum length: 1
Maximum length: 11

4.52. TransactionAuthorizationNumberType
Transaction Authorization Number
Minimum length: 1
Maximum length: 80

4.53. UrlType
URL (Uniform Resource Locator)
Minimum length: 1
Maximum length: 255

4.54. UserCredType

User Credentials Type. The effective size is A-32. If Type 1 security is used, then the actual field length is A-171.

Minimum length: 1

Maximum length: 171

4.55. UserKeyType

User Key Type

Minimum length: 1

Maximum length: 64

4.56. VersionType

Version Type

Minimum length: 1

Maximum length: 5

Pattern: [0-9]+

4.57. YearType

Year Type

Pattern: [0-9]{4}

4.58. ZipType

ZIP code

Minimum length: 1

Maximum length: 11

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