



## Department of Taxation and Finance

OPTS-Liability Correspondence Section-Income  
W A Harriman Campus, Albany NY 12227

November 16, 2023

### Account Adjustment Notice – Personal Income Tax



PUGLIA-ALEJANDRO  
325 LEXINGTON AVE APT 6C  
NEW YORK NY 10016-2691

23109173002900-AD00

**Taxpayer ID:** XXX-XX-4876

**Tax form filed:** IT-201

**Tax period ended:** 12/31/2022

**Original due date:** 4/18/2023

**Return file date:** 8/28/2023

**Return document locator number:** PH2310949894

**Refund ID number:** 0114526240

### We adjusted the amounts reported on your tax return.

We adjusted the return described above based on our computations or information we received.

- The *Explanation* section provides a detailed explanation of our changes.
- The *Computation* section shows how we computed your return.

If you disagree with our changes or the information in this notice, see the *If you disagree* section.

**Refund requested:** \$ 12,705.00

**Refund allowed:** \$ 9,695.88

### Explanation

Numbers to the left of the explanation paragraphs correspond to specific lines in the *Computation* section.

- 1 We adjusted the amount you reported as taxes withheld based on employer records and the information you reported on Form IT-2 or Form W-2.
- 2 We computed interest on the amount of your overpayment of tax from the effective date of the refund.
- 3 We adjusted your refund to reflect the computation as indicated in the *Computation Details*.

We are directly depositing your refund into your bank account.

### Computation

Any numbers to the right of *Computed by NYS* amounts below correspond to paragraphs in the *Explanation* section.

Description	Line number	Computed by NYS
Federal adjusted gross income	19	\$ 138,730.00
<b>New York adjusted gross income</b>	33	\$ 138,730.00
Standard or itemized deduction	34	8,000.00
<b>Taxable income</b>	37	\$ 130,730.00

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**Account Adjustment Notice – Personal Income Tax (continued)****Computation (continued)**

Description	Line number	Computed by NYS
<b>Total New York State taxes</b>	46	\$ 5,108.00
<b>New York City tax after credit(s)</b>	54	\$ 4,942.00
<b>Total NYC and Yonkers taxes /surcharges and MCTMT</b>	58	\$ 4,942.00
<b>Total amount due</b>		<u>\$ 10,050.00</u>
NY City school tax credit	69	+ 63.00
NY City school tax credit (rate reduction amount)	69a	+ 292.00
Total New York State tax withheld	72	+ 11,591.00 <sup>1</sup>
Total New York City tax withheld	73	+ 7,728.00 <sup>1</sup>
Total Yonkers tax withheld	74	+ 0.00 <sup>1</sup>
<b>Total payments and refundable credits</b>		<u>\$ 19,674.00</u>
<b>Overpayment **</b>		\$ 9,624.00
Interest due taxpayer		+ 71.88 <sup>2</sup>
<b>Amount available for refund</b>	78	\$ 9,695.88 <sup>3</sup>
NYS 529 account deposit amount	78a	0.00
<b>Refund after NYS 529 account deposit</b>	78b	\$ 9,695.88

\*\* Overpayment equals Total payments and refundable credits minus Total amount due

## **Account Adjustment Notice – Personal Income Tax (continued)**

### **If you disagree**

If you disagree with the information in this notice, or require additional explanation, follow the instructions below. You can respond online, by phone, fax, or mail. Most issues can be resolved with an informal department review.

#### **Respond online**

If you already have an *Online Services* account, you may be able to resolve this matter quickly and easily.

Visit the Tax Department's Web site , log in to your account, and use the ***Respond to Department Notice*** online service. When prompted, enter the following:

Document Locator Number: **PH2310949894**

Notice ID: **DTF-160**

If you do not have an *Online Services* account, you can visit our Web site to create one.

#### **Authorized representative**

If you are not responding online and would like someone to contact us on your behalf, you must give them permission to do so. You can do this in any of the following ways:

- using the Tax Department's E-ZRep/TR-2000 online program (the easiest and fastest way);
- designating them as your third-party designee on your New York State return or credit form;
- filing a completed *Tax Information Authorization* (Form DTF-280); or
- filing a completed *Power of Attorney* (Form POA-1).

#### **Respond by phone**

You can resolve any issues by calling us at 518-485-6549. Be sure to have the following available:

- the notice code: 3201
- your taxpayer identification number
- the document locator number: PH2310949894
- if you made any payments that are not reflected in this notice, have your proof of payment ready

Text telephone (TTY) or TDD equipment users: Dial 7-1-1 for the New York Relay Service.

#### **Respond by fax or mail**

You can send us a written explanation of why you disagree with this notice. Be sure to include:

- copies of any documentation that supports your position, such as cancelled checks or other proof of payment
- the *Document Locator Number* and *Notice ID* that appear above
- your taxpayer identification number
- your daytime phone number
- a completed power of attorney (or other authorization form), if applicable

Send by fax: 518-435-2990; or mail to: NYS TAX DEPARTMENT, OPTS-LIABILITY CORRESPONDENCE SECTION-INCOME, W A HARRIMAN CAMPUS, ALBANY NY 12227-0853.

If not using U.S. Mail, see Publication 55, *Designated Private Delivery Services*.

We will review the information you provide and notify you of our findings.

#### **Formal protest rights**

You also have the right to formally protest this notice in either of two ways:

- File Form CMS-1-MN, *Request for Conciliation Conference*, or
- File Form TA-100, *Petition for a Division of Tax Appeals Hearing*.

Visit [www.tax.ny.gov/protest/default.htm](http://www.tax.ny.gov/protest/default.htm) for information on how to file your formal protest.

To learn more, visit our website and see Publication 131, *Your Rights and Obligations Under the Tax Law*.

