



**FINANCIAL**<sup>TM</sup>  
DATA EXCHANGE

**Tax Data Server  
Information Form**

*Version 1.1  
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# Legal Notice

Financial Data Exchange, LLC (FDX) is a standards body and adopts this Tax Data Server Information Form for general use among industry stakeholders. Many of the terms, however, are subject to additional interpretations under prevailing laws, industry norms, and/or governmental regulations. While referencing certain laws that may be applicable, readers, users, members, or any other parties should seek legal advice of counsel relating to their particular practices and applicable laws in the jurisdictions where they do business. See FDX’s complete Legal Disclaimer located at <http://www.financialdataexchange.org> for other applicable disclaimers.

# Revision History

Document Version	Notes	Date
1.1	Added Introduction section with instructions	November 2024
1.0	Initial Document Release	June 2024

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# Introduction

The purpose of the Uniform Tax Data Server Information schema and related fillable PDF form is to allow organizations that host tax data servers to compile data once and to distribute that data to each of their client tax software applications. This document describes the fields in the fillable sections that follow.

The desired result of using this format is to simplify the work done by tax data providers and facilitate more participation in the ecosystem.

## Instructions

### Basic Information

Contact and company information in this form is self-explanatory. The type of contact is optional but may be used to describe the specialty of the individual.

### Server and Interface Information

Information about both OFX and FDX servers is provided. Schema versions, server URLs, and availability dates are listed.

### Logos

In this section, list the URL from which logo files may be downloaded.

Some tax software applications use square logos while others use rectangular logos. Both are acceptable. Note that logos are generally shown in the upper left corner of the tax data import screen in the software.

### User Interface

#### Fields

List the description for the document ID (USERID in OFX) and document code (PASSWORD in OFX) input fields.

#### Explanatory Paragraphs

Enter information to be presented to the user on the tax software data import screen.

Where the information should include a hyperlink, you may enter:

- The URL of the linked web page
- The text for the link
- A tilde (~) character in the paragraph location where the link should appear

## Forms and Go-Live Dates

Check the box for each type of form supported and enter the date when forms will be available for import.

## Testing Credentials

For each available test tax document, enter the document ID (or user ID) and document code (or password).

# Tax Data Server Information Form

Please provide the following information.

## Basic Information

### Contact Information

Name (1)

E-Mail

Phone

Type

Name (2)

E-Mail

Phone

Type

### Company Information

Name

Address 1

Address 2

City

State

Postal code

Support URL

## Server and Interface Information

### Open Financial Exchange (OFX) Server Information

OFX Tax  
Version

Production  
URL

QA URL

Go Live Date

Testing  
Availability  
Date

### Financial Data Exchange (FDX) Information

FDX Tax Version

Production URL

QA URL

Go Live Date

Testing Availability  
Date

### Logos

Square SVG

Square Hi Res PNG

Square 64x64 PNG

Rectangle 150x31  
PNG

## User Interface

Field Label 1

Field Label 2

Hyperlink Text

Hyperlink URL

Paragraph 1

Paragraph 2

Paragraph 3



## Forms and Go-Live Dates

Form	x	Go Live Date	Form	x	Go Live Date
1041 K-1	<input type="checkbox"/>		1099-OID	<input type="checkbox"/>	
1042-S	<input type="checkbox"/>		1099-PATR	<input type="checkbox"/>	
1065 K-1	<input type="checkbox"/>		1099-Q	<input type="checkbox"/>	
1065 K-3	<input type="checkbox"/>		1099-QA	<input type="checkbox"/>	
1095-A	<input type="checkbox"/>		1099-R	<input type="checkbox"/>	
1095-B	<input type="checkbox"/>		1099-S	<input type="checkbox"/>	
1095-C	<input type="checkbox"/>		1099-SA	<input type="checkbox"/>	
1097-BTC	<input type="checkbox"/>		1099-SB	<input type="checkbox"/>	
1098	<input type="checkbox"/>		1120S K-1	<input type="checkbox"/>	
1098-C	<input type="checkbox"/>		2439	<input type="checkbox"/>	
1098-E	<input type="checkbox"/>		3921	<input type="checkbox"/>	
1098-MA	<input type="checkbox"/>		3922	<input type="checkbox"/>	
1098-Q	<input type="checkbox"/>		5227 K-1	<input type="checkbox"/>	
1098-T	<input type="checkbox"/>		5498	<input type="checkbox"/>	
1099-A	<input type="checkbox"/>		5498-ESA	<input type="checkbox"/>	
1099-B	<input type="checkbox"/>		5498-QA	<input type="checkbox"/>	
1099-C	<input type="checkbox"/>		5498-SA	<input type="checkbox"/>	
1099-CAP	<input type="checkbox"/>		8888 (direct deposit)	<input type="checkbox"/>	
1099-DIV	<input type="checkbox"/>		W-2	<input type="checkbox"/>	
1099-G	<input type="checkbox"/>		W-2c	<input type="checkbox"/>	
1099-H	<input type="checkbox"/>		W-2G	<input type="checkbox"/>	
1099-INT	<input type="checkbox"/>		Business income stmt	<input type="checkbox"/>	
1099-K	<input type="checkbox"/>		Crypto gain/loss stmt	<input type="checkbox"/>	
1099-LS	<input type="checkbox"/>		Farm income stmt	<input type="checkbox"/>	
1099-LTC	<input type="checkbox"/>		Farm rental stmt	<input type="checkbox"/>	
1099-MISC	<input type="checkbox"/>		Rental income stmt	<input type="checkbox"/>	
1099-NEC	<input type="checkbox"/>		Royalty income stmt	<input type="checkbox"/>	

## Testing Credentials

#	ID	Password
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		