



## INFORMATION MANAGEMENT BUREAU

**To: Income Tax Vendors**

**Date: March 14, 2025**

The Montana Department of Revenue is preparing to implement a new schema version for Form FID. This is impacting the timeline for production electronically formatted individual tax return for estates and trusts. This version is MTEstateTrust2024V1.2. We are hard at work preparing the environment to accept these production returns.

Changes included in this version are:

1. MTEstateTrust2024V1.1 to MTEstateTrust2024V1.2.
2. Form FID, page 1, Taxable Income section.
  - a. Line 2, Reference number A01195. Schema Type changed to USAmountType.
  - b. Line 3b, Reference number A01205. Schema Type changed to USAmountType.
  - c. Line 4b Reference number A01225. Schema Type changed to USAmountType.
3. Form FID Page 3, Fiduciary Income Tax Calculation.
  - a. Lines 14, Reference numbers A03065. Schema Type changed to USAmountNNType.
  - b. Line 15, Reference numbers A03075. Schema Type changed to USAmountNNType.
  - c. Line 16, Reference numbers A03080. Schema Type changed to USAmountNNType.
  - d. Line 17, Reference numbers A03095. Schema Type changed to USAmountNNType.
  - e. Line 18, Reference numbers A03100. Schema Type changed to USAmountNNType.
  - f. Line 19, Reference numbers A03105. Schema Type changed to USAmountNNType.
4. Form FID Page 4, Non-Resident Estate or Trust.
  - a. Lines 13, Reference number A04205. Schema Type changed to USAmountNNType.

- b. Line 14, Reference number A04210. Schema Type changed to USAmountNNType.
  - c. Line 17, Reference number A04230. Schema Type changed to USAmountNNType.
  - d. Line 18, Reference number A04235. Schema Type changed to USAmountNNType.
  - e. Line 19, Reference number A04240. Schema Type changed to USAmountNNType.
  - f. Line 13, Reference number A04205. Change Field Description to 'Montana Ordinary Income Tax.'
  - g. Line 17, Reference number A04230. Change Field Description to 'Montana net long-term capital gains tax.'
- 5. Form FID Page 6, Schedule IV.
  - a. Lines 5, Reference number A06020. Schema Type changed to USAmountNNType.
  - b. Line 8, Reference number A06035. Schema Type changed to USAmountNNType.
  - c. Line 14, Reference number A06065. Schema Type changed to USAmountNNType.
  - d. Line 17, Reference number A06080. Schema Type changed to USAmountNNType.
  - e. Line 19, Reference number A06090. Schema Type changed to USAmountNNType.
  - f. Line 23, Reference number A06110. Schema Type changed to USAmountNNType.
  - g. Line 24, Reference number A06115. Schema Type changed to USAmountNNType.
  - h. Line 25, Reference number A06120. Schema Type changed to USAmountNNType.
- 6. Form FID Page 8, Montana Adjustments.
  - a. Line 1, Reference numbers A08230. Schema Type changed to USAmountNNType.
  - b. Line 2, Reference number A08235. Schema Type changed to USAmountNNType.
- 7. Form FID Page 4, Montana Adjustments to Income.
  - a. Line 3A, Reference numbers A04030. Changed Reject Code to USAmountNNType, to match the Business Rule, 'Column A, Line 3 must equal Column A Line 1 minus Column A Line 2.'

- b. Line 3b, Reference number A04035. Changed Reject Code to USAmountNNType, to match the Business Rule, 'Column B, Line 3 must equal Column B Line 1 minus Column B Line 2.'
- c. Line 3C, Reference number A04040. Changed Reject Code to USAmountNNType, to match the Business Rule, 'Column C, Line 3 must equal Column C Line 1 minus Column C Line 2.'

We will update all vendors as soon as the new Schema version is available.

For any questions, please email [DORe-Services@mt.gov](mailto:DORe-Services@mt.gov).