



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 currently preparing the environment to accept these files for production and will post another announcement once we are ready.**

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.