

STATE OF VERMONT DEPARTMENT OF TAXES

SCAN SPECIFICATIONS

FOR

PERSONAL INCOME



**2021
TAX YEAR**

All forms no longer have negative check boxes on them. Instructions say to use a – sign.

FORM IN-111

- **Personal exemption is \$4,350**
- Standard Deductions Updated
 - a. Single - \$6,350
 - b. Married/CU Filing Joint - \$12,700
 - c. Married/CU Filing Separate - \$6,350
 - d. Head of Household - \$9,500
 - e. Qualifying Widow(er) - \$12,700
- For those born before January 2, 1957, or blind the standard deduction increases by \$1,050

For those born before Jan.2, 1956 or blind				
	1	2	3	4
Single	7,400	8,450	n/a	n/a
Married Filing Jointly or Qualifying Widow(er)	13,750	14,800	15,850	16,900
Married Filing Separately	7,400	8,450	9,500	10,550
Head of Household	10,550	11,600	n/a	n/a

- The order that charitable contributions are listed on line 23 rotated to
 - a. Vermont Veterans Fund
 - b. Green Up Vermont
 - c. Nongame Wildlife Fund
 - d. Children's Trust Fund
- Added a box at top of page 2 to carry the amount from page 1 line 16 over to top of page 2.

SCHEDULE IN-112

Added 2 lines reserved for future needs. Lines 5 and 15. Do not allow entries on these lines. With added lines, all line numbers changed from line 5 to 17.

SCHEDULE IN-113

Added two lines to Part II. Lines 31a and 31b to report municipal bond interest

FORM IN-114

Form redesigned and barcode updated

FORM IN-116

Form redesigned and barcode updated

SCHEDULE IN-117

Updated some line references to the IN112, no change to form itself

- a. Line 11 should say IN-112, Part 1, line 4
- b. Line 14 should say IN-112, Part 1, line 7
- c. Line 15 should say IN-112, Part 1, line 9

SCHEDULE IN-119

Form redesigned and barcode updated

FORM IN-151

- Added email address to header.

SCHEDULE IN-153

The IRS has changed up the second page of schedule D, so the first 3 lines of 153 are pulling from different place on sch D and should say.

Line 2a – Federal Form 1040, Schedule D, line 18c(3) Total

2b- Federal Form 1040, Schedule D, line 18b(3) Total

FORM HS-122 Homestead Declaration AND Property Tax Credit Claim

- The maximum household income limit changed to \$136,900.
- Took span out of header and made line A1. This changed all line numbers in section I.

SCHEDULE HI-144

Form redesigned and barcode updated

FORM PR-141

Replaced with form RCC-146

SUBSTITUTE FORMS – GENERAL

Please provide users with printing instructions to ensure that their printed returns match the samples you submitted for approval.

List of Individual Income forms being scanned for the 2021 tax year

IN-111	IN-112	IN-113	IN-114	IN-116	IN-117	IN-119
HS-122	RCC-146	HI-144	IN-151	IN-152	IN-152A	IN-153

NOTE: Forms LRC-140 VT Landlord's Certificate and LRC-147 Statement of Rent for Mobile Home Park Lot Rent, Co-Ops, and Land Trusts are not reproducible and should not be included in your software.

Forms will be approved in subsets as indicated below. All forms in a subset must receive approval at the same time. *Example:* Form IN-111 will not receive approval until Schedules IN-112, IN-113, IN-117, IN-119, and IN-153 are approved. You are required to use the test samples found on the FTA SES website.

Subsets allowed:

1. IN-111, IN-112, IN-113, IN-116, IN-117, IN-119, IN-153
2. IN-114
3. HS-122, HI-144*
4. RCC-146
5. IN-151

6. IN-152
7. IN-152A

SUBSTITUTE FORMS

Substitute forms must be reproduced to match the official forms as closely as possible. All variable data fields must be in absolute positions. We will reject forms our scanning equipment cannot read.

When reconstructing forms, be aware of the following:

- Lines of text in paragraph must break at the exact location as the official forms.
- Match the font sizes of the official forms as closely as you can. Use bold fonts as they appear on the official forms.

PAPER AND INK

Paper for substitute forms must be at least 20 lb. white stock and the same size as the Department's original (8 ½ x 11 unless otherwise specified).

Forms and payment vouchers must be the same size as the officially printed forms and vouchers.

Software must inform taxpayers to submit originally printed forms and schedules for processing.

All pages of forms and schedules must be printed not just the pages with data on them. If there is any data filled in, your software should print all the pages of the form or schedules.

VARIABLE DATA FIELDS

USE COURIER or COURIER NEW 12 POINT FONT FOR ALL DATA FIELDS.

Data placement is specified as exact positions using a 10/6 grid -- 10 spaces per horizontal inch and 6 lines per vertical inch. Beginning grid position and maximum length of field is given in these specifications.

DO NOT print internal codes, date/time stamps, distribution information, etc. above the barcode or title of the form.

Alpha characters must be in **UPPERCASE** only.

Do not allow more characters in the body of the form than is allowed by "Maximum Field Length." Examples: 1) Do not allow 45 characters in the mailing address because the maximum length only allows 35 character; 2) Do not allow 7 or more digits in a dollar amount if the form only allows 6 digits. **IMPORTANT:** Dollar amount on Schedule HI-144 **MUST NOT** exceed 6 digits!

DOLLAR AMOUNTS

- All forms and schedules are whole dollar only.

- Do not use commas as thousand separators.
- All amounts fields are right justified.
- If negative value, print minus sign “-”.
- If no taxpayer entry, fields must be left blank except for hard coded zeros. Do not use non-numeric characters such as NONE, N/A, ZERO, etc. in the amount fields.

CHECKBOXES

- Must be formatted as blank or X only.

DATES

- Do not print slashes or dashes except for hard coded slashes.
- Date format: MMDDYYYY

TELEPHONE NUMBERS

- Do not print parentheses or dashes

TEST CASES AND SAMPLE DATA

Test cases will be posted to FTA SES website. The test cases are designed to look for specific issues that we have experienced with each form. It is imperative that you use all the information provided in each test case, not just the name and address. **If the sample(s) submitted do not use the test case information provided, the forms will be rejected.**

DUE DATE

First submittals for substitute forms approval must be received by the Department no later than Friday, January 3, 2022. First submittals received after January 3, 2022 will not be approved.

SUBMITTING FORMS FOR APPROVAL

When submitting forms for approval, please submit one blank form, one of each test cases using the samples posted on the FTA website and one full-field form. Please include your e-mail address in your cover letter. We will give approval/disapproval via e-mail.

Blank forms contain no variable data and should have a barcode where applicable.

Sample data forms must be created using the test cases found on FTA SES website. If our test cases are not used, then submitted forms will not be tested or approved.

Full-field forms are like those shown in these specifications. Each field is filled with numbers and/or letters to show the maximum field lengths while conforming to specifications. Example: If a field is a numeric field, do not fill with letters.

The sample forms should be sent to:

(via UPS, FedEx, DHL, etc., use:)

Ann Lane, Vendor Liaison
Vermont Department of Taxes
133 State Street
Montpelier, VT 05633-1401

(via US Mail, use:)

Ann Lane, Vendor Liaison
Vermont Department of Taxes
PO Box 429
Montpelier, VT 05601-0429

RELEASE OF PROGRAM

Vendors should notify the Department by e-mail (ann.lane@vermont.gov) when their program is released.

MAILING COMPLETED RETURNS

The Department has two addresses for mailing completed Income tax returns (Personal Income tax returns only). This is for use by the taxpayer(s) and tax preparer(s). These addresses are not for submitting forms for approval prior to selling or using the software.

Returns with payment enclosed:

Vermont Department of Taxes
PO Box 1779
Montpelier, VT 05601-1779

Returns expecting a refund or no tax due:

Vermont Department of Taxes
PO Box 1881
Montpelier, VT 05601-1881

SCAN SPECIFICATIONS

LAYOUT

- The form was designed on a 10x6 grid.

SHADING

- Should not be used on any part of the forms.

TARGETS/ANCHORS

- Targets are required on the forms. Exact placement of targets is required. Follow grid layout for size and positioning.
- There are three targets on each page as shown below.



BARCODE

- This is specific to the form.
- The last two digits of the barcode represent your VT vendor number.
- Follow grid layout for positioning.

VENDOR CODES

Vermont requires Vendor ID Codes in two places on the forms. In most cases, both numbers identify the same company.

- **Forms** - Each vendor that creates forms will use the 2-digit Vendor code assigned by the Department in place of the “00” as the last two digits in the barcode. If you need a 2-digit vendor code, please contact Ann Lane via email at ann.lane@vermont.gov
- **Data** - Each vendor that creates software that prints the variable data on Department-approved substitute forms will print their 4-digit ID number assigned by the National Association of Computerized Tax Processors (NACTP) on each page of the form on the bottom left corner. If you need an NACTP ID number, please complete the form at <https://www.nactp.org>

Important Instructions for All Income Forms and schedules

Printing issue - Showing more than one form or schedule on the same printout is not acceptable. If printing in duplex, both pages of a substitute form must match the official form. For instance, IN-111 can be printed on both sides of the paper as the official form is a multi-page. Taxpayers have filed returns with more than one form or schedule duplexed or page 1 of IN-111 on the back page of the software filing instructions/tax summary. Intermingling of forms will delay the processing of tax returns.

Missing pages - When submitting a multi-page form, please advise taxpayers to send all its pages. For instance, IN-112 is a 2-page form, both pages must be submitted.