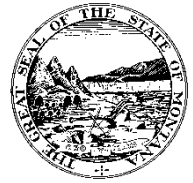




Gene Walborn
Director

Montana Department of Revenue



Steve Bullock
Governor

Tax Year 2018 Substitute Form Registration

- All companies (primary & secondary) developing software that will produce State of Montana tax forms must complete a substitute form registration annually. Complete all information fields.
- If you do not have a MT ID from the previous tax year, leave that field blank. We will send a confirmation email to confirm you are a registered vendor and provide your MT Software Provider ID.
- Please review form testing and submission changes in the 2018 Montana DOR Specifications for Reproducing Substitute Scannable Tax Forms and Payment Vouchers (available on the FTA State Exchange System)

What type of software provider are you? (Please check only one)

- Primary – Software Provider creating substitute forms
- Secondary – Software Provider not creating forms, but using another company’s form in their software package
 - What Primary Company is supplying forms to you? _____
- Secondary – Software Providers using Montana’s official form in their software

Montana provides you with form testing templates. Is your company able to use Adobe layers? _____
(<https://helpx.adobe.com/acrobat/using/pdf-layers.html>)

Company Name		Software Product(s) Name	
Address			
City	State	ZIP Code	
MT ID	NACTP ID(s)		

Primary Contact		Email Address	
Telephone	Extension	Fax	
Secondary Contact		Email Address	
Telephone	Extension	Fax	

By submitting this registration, the software company agrees to comply with the following:

- Develop substitute MT tax forms in accordance with the Specifications issued by the MT Department of Revenue
- Submit substitute forms, including all requested test samples and pages of each submitted tax form, to the MT Department of Revenue for review and approval
- Correct any errors found on test forms and re-submit for approval
- Approval of each tax form must be granted by the MT Department of Revenue before the vendor can distribute forms to the public for processing
- Failure to follow the Specifications may result in completed tax forms submitted by the public being rejected by the MT Department of Revenue
- Software Provider will be contacted and expected to update and maintain their forms/software as well as notify customers when changes have been made
- Provide customers with printing standards needed to produce original printed forms (no photocopies are accepted)
- By submitting this registration form to the Department, you are agreeing to meet our standards for software provider registration, tax preparation software (DIY or professional), and substitute forms.
- The software provider will not release substitute forms into production before successfully completing all required testing and an approval has been issued for the entire software product. Software products released for production must adhere to all return specifications, business rules and Montana publications. The software provider will not advertise Montana’s acceptance of software until testing approval is provided. Montana will not accept returns prior to approval.

Please send your completed registration form to: MTDORsubstituteforms@mt.gov

Individual Income Tax, Vouchers & Supplemental Forms

- Form 2**
(Required with Form 2: Schedule 1 (Federal) Additional Income and Adjustments to Income; Schedule Montana Additions; Schedule Montana Subtractions; Schedule Montana Medical Savings Account (MSA); Schedule Itemized Deductions; Schedule Tax Liability; Schedule Nonresident/Part-Year Resident Ratio; Schedule Nonrefundable Credits; Schedule Credit for Income Tax Paid to Another State or Country; Schedule Other Payments and Refundable Credits; Schedule Elderly Homeowner/Renter Credit; Schedule Contributions and Penalties)
- IT Payment Voucher**
- ETM** Enrolled Tribal Member
- MHPE** Mobile Home Park Exclusion
- MT-R** Reciprocity Exemption from WTH (for ND residents working in MT)

Withholding Form & Voucher

- MW-3** Annual Wage Withholding Tax Reconciliation
- MW-1** Payment Voucher

Corporate Income Tax, Voucher & Supplemental Form

- CIT**
(Required with CIT: Sch K, Sch C, Sched M, Sched K Combined for MT CIT, NOL, & Sched WE)
- CT Payment Voucher**
- MHPE** Mobile Home Park Exclusion

Fiduciary Tax, Voucher & Supplemental Form

- FID-3**
(Required with FID-3: Sch A, Sch B, Sch C, Sch D, Sch E, Sch F, Sch G, Sch H, & Sch K-1)
- FID Payment Voucher**
- Schedule K-1 (for FID)** Beneficiary's Share of Income (Loss), Deductions, Credits, etc.

Pass-Through Entity Tax, Vouchers & Supplemental Forms

- CLT-4S**
(Required with CLT-4S: Sched I, II, & IV-VI)
- SB Payment Voucher**
- Schedule K-1 (for CLT-4S)** Shareholder's Share of Income (Loss), Deductions, Credits, etc.
- DER-1**
(Required with DER-1: Sched I)
- DER Payment Voucher**
- PR-1**
(Required with PR-1: Sched I, II, & IV-VI)
- PR Payment Voucher**
- Schedule K-1 (for PR-1)** Partner's Share of Income (Loss), Deductions, Credits, etc.
- MHPE** Mobile Home Park Exclusion
- PT-AGR** Pass-Through Entity Owner Tax Agreement

Vendor Additional Information

Do you support all pages of a form you are re-producing? If not, list the form name and page number not supported.

List any other information that will help the MT DOR expedite your forms approval process.
