# Taxpayer Access Point Frequently Asked Questions

# TOP QUESTIONS

## How do I change my saved return?

1. Login to TAP.
2. In the My Accounts tab, click on the blue Account Id link.
3. Assure that the All Periods tab is selected.
4. In the All Periods tab, click on Returns to File or View for the period you want to change.
5. Click on View Request.
6. Click on Change to make changes.
7. When you are finished, click on Submit to submit your final return.

# FREQUENTLY ASKED QUESTIONS ABOUT TAP

## Who can use TAP?

Businesses, individuals, and representatives such as accountants, bookkeepers, and payroll professionals can all use TAP to manage their Montana tax accounts.

- Individuals - If you have filed a Montana Individual Income Tax Return within the last 5 years, you can create a login to access your account information in TAP. If you have not filed a Montana Individual Income Tax Return within the last 5 years, you can still use TAP to file your return as TAP does not require a login and is available to non-residents, part year residents, or full year residents; however, you will not be able to create a login account until you have filed at least one return.
- Businesses - A business that has a Montana Tax Account ID or has already filed a return with the Department of Revenue can sign up for access to their accounts. If you are a new business in Montana with wage withholding, mineral wage withholding, lodging facility tax or rental vehicle tax and need to register your business with the Department of Revenue to file reports, you may complete and file a registration form on TAP by selecting Request Account ID**.**
- Representatives - Authorized representatives can access and manage tax accounts for their clients.

## Benefits of using TAP

- It's Free! – There is no cost to use TAP.
- Convenient – Access TAP where and when you want – 24 hours a day, seven days a week. You won't wait in lines or on the phone.
- Simple – sign up for access the first time you use TAP.
- Secure – TAP protects your tax information and provides you with a secure online experience. Your self-created ID and password verify your identity and allow you to securely do business with the government online.
- Environmentally friendly – you can choose to stop receiving paper returns and manage your taxes online instead.
- Fast – TAP is the fastest way to get your refund. You can also see any payments and changes you make to your account within 24 hours.

## Is there a cost to use TAP?

No. Using TAP is a free service of the Montana Department of Revenue.

## How is my tax information protected in TAP?

The Montana Department of Revenue uses a secure online registration service to protect your tax information when using TAP. To use TAP, your browser must support 128-bit encryption.

As an added security measure, you are automatically logged out of TAP after 30 minutes of inactivity.

You also play an important role in safeguarding your tax information when using TAP by:

- Keeping your ID and password secret
- Creating a unique password and answer to the secret question
- Logging out of TAP after each session

# MANAGE YOUR TAX ACCOUNT USING TAP FULL SERVICES (LOGIN REQUIRED)

- File or amend certain tax returns or submit license renewals
- Make tax payments (including scheduling payments for future dates)
- View your account history – previously filed returns and previously submitted payments
- Update account information such as an address or name change
- Grant your account representative (accountant, bookkeeper, or other professional) third party access to use TAP on your behalf
- Access all your tax accounts under a single login

## Which taxes, fees, and licenses can I access online using TAP?

| | | |
|---|---|---|
| Agency Liquor Store (LIQ) | Excise and License Tax (ELT | On-Premises License (ONP) |
| Bad Debts (BDT) | Fiduciary-Estates and Trusts (FID) | Other Tobacco Products (OTP) |
| Beer Connoisseur Tax (BCT) | Foreign Brewery Import License (FBI) | Partnership (PTR) |
| Beer Tax (BET) | Foreign Winery Import License (FWI) | Public Service Regulation Fee (PSR) |
| Bentonite (BEN) | Gambling Operator (GOA) | Rental Vehicle Tax (RVT) |
| Brewery Storage Depot (BSD) | Hard Cider (HCT) | Resource Indemnity Tax (RIT) |
| Cement and Gypsum (CGT) | Hospital Facility Utilization Fee (HUF) | Retail Telecommunications Excise Tax (RTE) |
| Cigarette Tax (CIG) | Individual Income Tax (IIT) | Small Business Corp (SBC) |
| Coal Gross Proceeds (CGP) | Liquor Shipper (TRK) | Telephone Device for the Deaf (TDD) |
| Coal Severance Tax (CST) | Liquor Vendor Acct (LVA) | Vendor Representative License (VRL) |
| Common Carrier Tax (LCT) | Lodging Facility Sales & Use (LFT, LST) | Wholesale Energy Trans Tax (WET) |
| Connoisseur License (CON) | Metal Mines Gross Proceeds (MMG)) | Wholesale License (WSL) |
| Consumer Counsel Fee (CCT) | Metalliferous Mines License Tax (MML) | Wine Connoisseur Tax (WCT) |
| Corporate License Tax (CLT) | Mineral Royalty (MRW) | Wine Tax (WIT) |
| Distilled Spirits Mfr License (DSM) | Misc Mines Net Proceeds (MMN) | Withholding Tax (WTH) |
| Domestic Brewery License (DBR) | Nursing Facility Utilization Fee (NFB) | 911 Emergency Telephone Fee (911) |
| Domestic Winery License (DWR) | Off-Premises License (OFF) | |
| Electrical Energy Tax (EEL) | Oil and Gas Production Tax (COG) | |

## Can I access multiple tax accounts through my TAP account?

Yes. Once you have signed up for TAP access, you can add access to any tax account that is part of the TAP system. Follow these steps to add access to your other tax accounts.

1. Select Add Access to Another Account located on the left side of the screen.
2. Enter verification information for each account:

   - Individual Income Tax – Your social security number and Federal Adjusted Gross Income (Fed AGI) from your last filed return in Montana. If you only filed a 2EC last year, you may use the total gross household income from Form 2EC line 1. You must have filed a return within the last 5 years to gain access to your Montana TAP account.
   - Business Income Tax, Miscellaneous or Liquor accounts – the 13 digit alphanumeric Montana Tax Account ID. Formatted as 1234567-890-XXX.
   - Wage Withholding – the 13 digit Montana Tax Account ID, zip code, and last payment amount or total wages paid subject to withholding from your most recent form MW-3 or your FEIN.
3. Select Submit
4. After submitting the access request, select My Accounts under Navigation on the left hand side of screen. The new account will appear in your Account list.

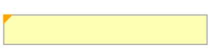
## What information do I need to sign up for account access in TAP?

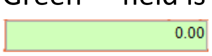
You must be a customer in our tax system (have a Montana Tax Account ID or have filed a previous return) and have a valid email address to sign up for TAP access. You will also need the following information.

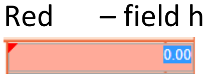
- <u>Individual Income Tax</u>
  - Social Security Number
  - Federal Adjusted Gross Income (Fed AGI) from your last return filed in Montana. If you only filed a Form 2EC last year, you may use the total gross household income from Form 2EC Line 1. You must have filed a return within the last 5 years to gain access to login to your Montana TAP account. If you do not know your Federal Adjusted Gross Income (Fed AGI) from your last return filed in Montana, please contact us.
- <u>Business Income Tax, Miscellaneous Taxes or Liquor Accounts</u>
  - Montana Tax Account ID assigned by the Department of Revenue when an account is created. This 13-digit alphanumeric ID is formatted as 1234567-890-XXX. If you do not know your Montana Tax Account ID, please contact us.
- <u>Wage Withholding</u>
  - The 13 digit Montana Tax Account ID
  - Zip code
  - Federal Identification Number (FEIN)
  - Instead of your FEIN, you may use the last payment amount or total wages paid subject to withholding from your most recent Form MW-3.

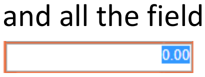
## What do the different colors mean?

- Yellow – information is required

  
- Green – field is optional

  
  
- Red – field has incorrect or insufficient information

  
  
- White – field cannot be edited. It may be an auto-calculated field. If you are accessing a saved return and all the fields are white select Change to complete your return.

  
  
- Errors may be yellow or red. Red is incorrect information in a field. Yellow is required information that must be entered to continue.
- All yellow and red errors must be corrected before you may submit a return.

- All boxes with errors, whether yellow or red, will also have a triangle in the upper left hand corner of the box.

# LOGINS AND PASSWORDS

## How do I sign up for account access?

Follow these steps to sign up for TAP:

1. Go to the TAP web page. In the lower right corner of the screen under 'Sign up for Account Access'.
2. Click the button Sign up Now!
3. Enter the required information and select Submit.

Within 5-10 minutes you will receive an authorization code and you may login to your account.

## I signed up for TAP access but have not received an authorization code yet. Where is it?

The authorization code will come from DoNotReply.TAP@mt.gov. Some internet providers and spam filters may stop certain emails. Ensure you set these filters to allow an email from DoNotReply.TAP@mt.gov. If you are unable to locate the email, please contact us for further assistance.

## Do I need to enter my authorization code each time I log in to TAP?

No. You only need the authorization code the first time you login or if you use the Forgot my Password feature.

## I have multiple tax accounts. Can I access all of them in TAP?

Yes. Once you have signed up for TAP access, you can add access to any tax account that is part of the TAP system. Follow these steps to add access to your other tax accounts.

1. Select Add Access to Another Account located on the left side of the screen.
2. Enter verification information for each account:
   - Individual Income Tax – Your social security number and Federal Adjusted Gross Income (Fed AGI) from your last filed return in Montana. If you only filed a 2EC last year, you may use the total gross household income from Form 2EC line 1. You must have filed a return within the last 5 years to gain access to your Montana TAP account.
   - Business Income Tax, Miscellaneous or Liquor accounts – the 13 digit alphanumeric Montana Tax Account ID. Formatted as 1234567-890-XXX.
   - Wage Withholding – the 13 digit Montana Tax Account ID, zip code, and last payment amount or total wages paid subject to withholding from your most recent form MW-3 or your FEIN.
3. Select Submit
4. After submitting the access request, select My Accounts under Navigation on the left hand side of screen. The new account will appear in your Account list.

### I forgot my password. How do I access my account?

If you have forgotten your password, please use the Forgot My Password feature. The button is located in the top right hand corner of the login screen. You will need your username and answer to your secret question. A new authorization code will be emailed to you to use at login.


### I forgot my password and followed the steps but have not received an authorization code yet. Where is it?

The authorization code will come from DoNotReply.TAP@mt.gov. Some internet providers and spam filters may stop certain emails. Ensure you set these filters to allow an email from DoNotReply.TAP@mt.gov. If you are unable to locate the email, please contact us for further assistance.

### I'm worried that my password has been compromised. What should I do?

You can change your password at any time by following these steps:

1. Login to your account
2. Select View My Profile
3. Select Change Password
4. Follow instructions to set a new password

### I no longer want access to my accounts in TAP. How do I cancel my access?

You can cancel your TAP access at any time by following these steps:

1. Login to TAP
2. Select View My Profile
3. Select Cancel My Online Access
4. Enter your password
5. Select OK

If you decide later that you want to access your accounts in TAP, you must sign up for TAP access again with a new Login ID. Login IDs cannot be re-used.

## FILING AND VIEWING RETURNS

### How do I file a return?

Follow these steps to file a return:

1. Login to your TAP account, select Account ID from your Home Page
2. Under the Periods tab, assure that the All Periods tab is selected
3. Select File Now (or Returns to File or View) next to the period you wish to file

### Which tax form should I file?

The following information will guide in deciding which tax form you should file.

**You may be able to use the Form 2EZ if you answer yes to all of the following:**

- I was a Montana resident for all of this tax year.
- I am filing as a single person or as a married person filing a joint tax return.

- I (and my spouse, if married) was not over 65 or blind at the end of the year.
- I am claiming no dependents.
- My only income is from wages, interest, dividends, or unemployment.
- I am claiming the standard deduction rather than itemizing deductions.
- I have not made estimated income tax payments.
- I am not claiming any credits.
- I did not receive a taxable federal refund in this tax year.
- I did not have any military or tribal income that is exempt from income tax.

**To use the Form 2M, you should be able to answer yes to all of the following:**

- I was a Montana resident for all of this tax year.
- I am filing as a single person, head of household, or as a married person filing a joint tax return.
- My only income is from wages, interest, dividends, capital gains, IRA distributions, pension, annuities, unemployment, social security benefits or taxable refunds.
- The only tax credit that I may be claiming is one (or more) of the following:
  - Adoption Credit
  - Elderly Homeowner/Renter Credit (Form 2EC)
  - College Contribution Credit (Form CC)
  - Energy Conservation Credit (Form ENRG-C)
  - Elderly Care Credit (Form ECC)
  - Alternative Energy System Credit (Form ENRG-B)
- I did not have any military or tribal income that is exempt from income tax.

**Form 2 is available for all taxpayers. Form 2 is required if you answer yes to any of the following:**

- I was a resident of Montana for only part of this tax year.
- I am a nonresident of Montana with Montana source income.
- I am married filing a separate Montana income tax return.
- I am claiming alimony paid or a penalty on early withdrawal of savings.
- My income includes income from a business or profession, farm or ranch, rents, royalties, partnerships, S corporations, estates, trusts, military or tribal income that is exempt from income tax.
- My tax year ended on a date other than December 31.
- I am claiming the tax withheld from my Montana mineral royalty payments.
- I am claiming the tax withheld by a pass-through entity from a Montana Schedule K-1.

**The Montana elderly homeowner/renter credit is a property tax relief program that provides you with a refundable credit. To qualify:**

- You must be age 62 or older as of December 31 of this tax year.
- You must have resided in Montana for nine months or more during the year.
- You must have occupied a Montana residence for six months or more during the year.
- Your gross household income is less than $45,000.

**Form ETM is available for Enrolled Tribal Members who are claiming exempt tribal income.** You no longer have to file a Montana income tax return (Form 2) if you are a tribal member <u>and</u> all of your income is exempt from Montana income tax. Form IND Tribal Member Certification has been replaced by the ETM form which will serve as your return.

Form ETM is required if you are exempting income as an enrolled member and all of the following apply to you:

- You are an enrolled tribal member of the governing tribe of a reservation.
- You resided and worked on that reservation.
- You earned the income by working on that reservation.

If only part of your income is exempt from Montana income tax, you will need to file the ETM form as well as the Montana Form 2.

Additionally, please note that the Form ETM is for each individual enrolled member. Each spouse must file their own Form ETM if both spouses are enrolled members and the above criteria apply.

## What filing status should we use?

### My spouse is a resident of another state while I am a resident of Montana. What filing status should we use?

If one spouse is a resident of Montana and the other spouse is a resident of a different state, the taxpayers will need to file separate returns each using Form 2 and the filing status of 'Married Filing Separate on Separate Forms'. Each spouse will report all of their income on the front page of their return, and the non-resident spouse will then use Schedule IV to report only the Montana portion of their income.

If one spouse does not have any Montana source income, then that individual will not need to file a Montana return and the spouse claiming Montana residency and has earned Montana source income files Form 2 using a filing status of 'Married Filing Separately and Spouse Not Filing'.

### My spouse is working in another state while I am still living and working in Montana. What filing status should we use?

If both spouses are maintaining Montana residency but one spouse is living and/or working in another state, you are permitted to file your Montana tax return as 'Married Filing Joint' or as 'Married Filing Separately on the Same Form'. This is dependent on taxpayer residency, however, and the Montana Department of Revenue maintains the right to request more information if there is any question as to residency status.

## I've completed all my information on the return. The step still says Needs Correction. How do I find my errors?

- Errors may be yellow or red. Red is incorrect information in a field. Yellow is required information that must be entered to continue
- All yellow and red errors must be corrected before you may submit a return
- All boxes with errors, whether yellow or red, will also have a triangle in the upper left hand corner of the box

## Where do I find a previously filed return?

Follow these steps to find a previously filed return:

1. Login to your TAP account, from your Home Page, select the Account ID
2. Under the Periods tab, assure that the All Periods tab is selected
3. If you do not see previously filed returns, select Change Date and enter an earlier date
4. Select View Returns (or Returns to File or View) next to the period you wish to view

## What if the year I need to file is not listed?

If the year you wish to file is not listed in the All Periods tab, you must file a paper return. Paper forms can be found in our downloadable forms.

## Can I save my return and finish it later?

Follow these steps to save a return and finish it later:

1. Select the Save and Finish Later button.
2. Enter your password and Select OK.
3. A Confirmation screen will appear.

When you return to TAP, follow these steps to change your return:

1. Log in to TAP.
2. In the My Accounts tab, click on the blue Account Id link.
3. Assure that the All Periods tab is selected.
4. In the All Periods tab, click on Returns to File or View for the period you want to change.
5. Click on View Request.
6. Click on Change to make changes.
7. When you are finished, click on Submit to submit your final return.

## How do I change my saved return?

8. Login to TAP.
9. In the My Accounts tab, click on the blue Account Id link.
10. Assure that the All Periods tab is selected.
11. In the All Periods tab, click on Returns to File or View for the period you want to change.
12. Click on View Request.
13. Click on Change to make changes.
14. When you are finished, click on Submit to submit your final return.

## What does the 'Withdraw' button in TAP do?

If you wish to remove your TAP return and begin a new one, you can select Withdraw. Selecting Withdraw will remove your return from an active status but will not remove the return completely. You will still have the opportunity to view this return.

## Why can't I make changes or enter information after saving my return?

If you have saved your return, you will need to select Change before you will be able to enter any information or make any changes to your return.

## I have submitted a return in TAP. How can I tell if it has been processed or find its status?

Go into the account and select the Requests tab. From the Request screen select the Search tab. If the status says:

- Stored – you have not submitted the return to be processed. Select the title link, and then select Change on the left side of your screen. From here you can complete your return and select Submit to file your return with MT Department of Revenue.
- Pending – The return is waiting to be loaded to our main tax system. The upload occurs at 5pm each day. A return can be withdrawn or changed if the status is Pending.

- Complete – The return has been loaded to our main tax system. If changes need to be made, an amended return is required.

## How do I amend a previously filed return?

Individual Income Tax Returns cannot be amended through TAP, a paper return is required. Paper forms can be found in our downloadable forms.

The following returns can be amended through TAP; all others must be amended by filing a paper return. Paper forms can be found in our downloadable forms.

- 911 Emergency Telephone Fee (911)
- Beer Tax (BET)
- Bentonite Production Tax (BEN)
- Consumer Counsel Fee (CCT)
- Cement and Gypsum Producers License Tax (CGT)
- Coal Gross Proceeds Tax (CGP)
- Coal Severance Tax (CST)
- Electrical Energy Producers License Tax (EEL)
- Hospital Facility Utilization Fee (HUF)
- Lodging Facility Sales and Use (LFT)
- Metalliferous Mines License Tax (MML)
- Metal Mines Gross Proceeds Tax (MMG)
- Miscellaneous Mines Net Proceeds Tax (MMN)
- Oil and Natural Gas Production Tax (COG)
- Public Service Regulation Fee (PSR)
- Rental Vehicle Tax (RVT)
- Resource Indemnity Trust Tax (RIT)
- Retail Telecommunications Excise Tax (RTE)
- Telephone Device for the Deaf (TDD)
- Wholesale Energy Trans Tax (WET)
- Wine Tax (WIT)

## I submitted my return, but realized I made a mistake. Can I correct it?

Submitted returns can be changed until 5pm on the day of submission.

To make changes to a submitted return within the time limit, follow these steps:

1. Login to TAP
2. Select Account ID from your Home Page
3. Select View Request for the return you need to update
4. Select Change

If you were unable to make your change prior to that time, an amended return is required to be filed by paper. Paper forms can be found in our downloadable forms.

### I have entered my W-2 and 1099 information and the information did not total and go to the correct lines on the form. Why?

TAP is a self-prepare site. These values will not carry over to the form. Often a taxpayer will have income that was not reported to them on a Form W-2 or 1099, therefore, TAP will only cause an error to occur if the income value entered is less than the total entered or if the withholding value entered is more than the total entered.

### Why do I need to fill out all of my W-2 and 1099 information when these forms aren't required with paper filings?

This information is not required to file in TAP, the only information that is required are the yellow fields. However; it is recommended that you maintain a copy of the Forms W-2 and 1099 in your personal files as they may be requested at a later date from an auditor if your return is selected for review and the information cannot be verified.

## PAYMENTS IN LOGIN ACCOUNT

### How do I make extension and estimated tax payments using TAP?

Follow these steps to make an extension or estimated tax payment:

1. Once you are logged into your TAP account, select Account ID from your Home Page.
2. On the left side of the screen select Make a Payment.
3. Select the Period for which you are making a payment.
4. Select the Payment Type that you are making.

### How do I pay the outstanding balance on my account?

Follow these steps to pay the outstanding balance on your account:

1. Once you are logged into your TAP account, select Account ID from your Home Page.
2. On the left side of the screen select Pay Account Balance.
3. Select the option you would like to use and follow the prompts.

### Can I make an e-Check or ACH Debit payment?

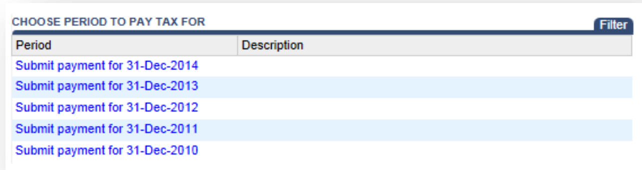
Yes, you can by entering your bank routing and account number after selecting the e-check option for a payment. (No fee)

### Can I make a payment by credit card using TAP?

Yes. We accept Visa or Master Card. Debit and Credit Card are subject to a fee charged by the processor service.

### I can't find the period end date that I need to pay for. What do I need to do?

Use Make a Payment on the left side of the screen. It will display prior and future period end dates. If you are still unable to locate the period end date you want to pay for, contact us for further assistance.




## I have tax due on my return but cannot pay it in full by the due date. Can I make a payment arrangement?

Payment arrangements can be requested by submitting [Form ARC-1] (Request for a Payment Plan) by mail.

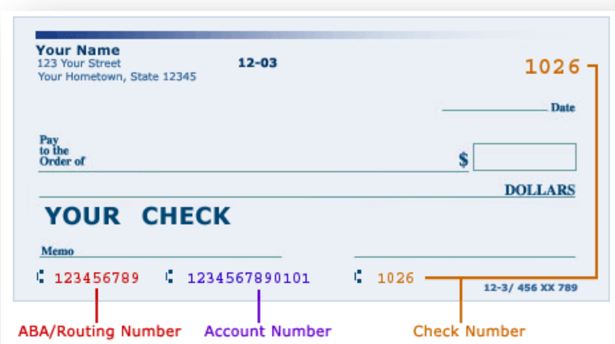
## I made an error entering my payment information. How do I fix it?

If you made an e-check or ACH debit payment you have until 5 pm on the payment date to correct it. You must cancel the e-payment and re-enter a correct payment. To cancel a payment:

1. Go to the Requests tab
2. Select the payment you wish to change
3. Select the Withdraw on the left side of the screen
4. Select Confirm to complete the withdrawal
5. To enter a correct payment, go back to the Period tab & select Make a Payment or Pay

If you made a Debit or Credit Card payment, it cannot be canceled. The transaction is sent immediately to the banking institution. You may contact your bank institution for assistance.

## How do I find my bank routing and account number?




## What information will my bank need to process debit payment requests?

Some banks may need our payment authorization code: 3810302402

## Can I save my bank information for future use?

Yes. You can save your banking information.

1. After logging into TAP, select View My Profile from your Home Screen
2. Under My Accounts tab, select Advanced Payment Options tab
3. Select Add New

4. Enter banking information
5. Multiple bank accounts may be saved, be sure to be update any changes and remove unused accounts

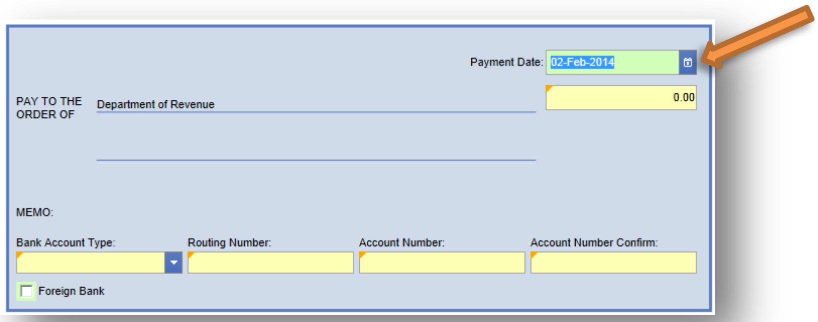
## Can I change or delete bank information I have saved?

Yes. You can change or delete bank account information by completing the steps below:

1. After logging into TAP, select View My Profile from your Home Screen
2. Under My Accounts tab, select Advanced Payment Options tab
3. Select Bank Name
4. Choose Delete on left side of screen
5. Select Confirm on left side of screen

## Can I submit a payment to process on a future date?

Yes, ACH Debits and e-checks can be scheduled for a future date. When submitting an ACH Debit or e-check, select a date in the future up to 365 days.




## Will I get a confirmation number if I make a payment in TAP?

Yes. After you enter your password to submit a payment, a Confirmation screen will provide you with a confirmation number.

## How long will it take for my payment to process?

Payments will usually post to your bank account within 3 to 5 business days.

## Why do you ask about accounts outside the U.S.?

We are unable to accept payments from an account outside the U.S. at this time.

## I have submitted a payment in TAP. How can I tell if it has been processed or find its status?

Go into the account and select the Requests tab. From the Request screen, select the Search tab. If the status says:

- Pending – The payment is waiting to be processed to our main tax system. The upload occurs at 5pm each day. A payment can be withdrawn or changed if the status is Pending.
- Complete – The payment has been processed.

### How do I view my payment history?

After logging into TAP, select Account ID and choose the Activity tab. This will display your returns and payments.

## OTHER FORMS REQUIRED FOR YOUR RETURN

### Montana Tax Credits - I am completing my Montana Tax Credits schedule and am required to complete a credit form as well. When I click on the credit form link, TAP opens the document in a different tab. Are these forms somehow submitted with my return through TAP?

No. When you click on the credit form link, the document will be opened up in a separate tab for you to complete; however, these are not submitted through TAP, they are for your use in calculating the credit. You will need to save this form to your computer as a separate file or print it out for your records. Please keep these files handy in the event an auditor requests that information at a later time.

### Federal Tax Forms - I am completing my Montana Tax Return and the return states that I must include certain Federal Forms. Can I attach and send these forms through TAP?

No. We recommend that you simply maintain a copy of these Federal Income Tax Forms for your records and be able to provide them to the Montana Department of Revenue in the even that your return is selected for review.

## WHERE'S MY REFUND?

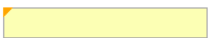
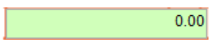
### I have submitted my return, how do I check my refund?

Go to TAP & follow these steps:

1. Under Individual, select "Where's My Refund"
2. Enter your Social Security Number (SSN) and the amount you are expecting as a refund
3. You will see your status as your refund moves through our processing system

# FILE AN INDIVIDUAL TAX RETURN (NO LOGIN REQUIRED)


## What do the different colors mean?

- Yellow – information is required
  
- Green – field is optional
  

- Red – field has incorrect or insufficient information
  

- White – field cannot be edited. It may be an auto-calculated field. If you are accessing a saved return and all the fields are white select the Change button to complete your return.
  

- Errors may be yellow or red. Red is incorrect information in a field. Yellow is required information that must be entered to continue.
- All yellow and red errors must be corrected before you may submit a return.
- All boxes with errors, whether yellow or red, will also have a triangle in the upper left hand corner of the box.

## I saved my return to finish later, how do I get back to my return?

Go to TAP and follow these steps:

1. Under Individual, select Retrieve a Saved Return
2. Enter your email address and the 6 digit alphanumeric retrieval code emailed to you at the time you saved your return
3. Select Search

If your return is incomplete (has not been submitted), remember to select Change to continue.

## I have saved or submitted my return, but forgot to write down my retrieval code. Can I still access my return?

Check your email inbox, we have sent your retrieval code to you for future reference. The email is coming from DoNotReply@mt.gov. You may need to check your junk folder. If you need further assistance retrieving a saved return you can contact us.

### I’m unable to change information on my return, what do I do?

If you have not submitted the return, select Change to update the return.
If you have submitted your return and need to make changes, an amended return is required by paper. Paper forms can be found in our downloadable forms.

### Can I print a draft copy of my return prior to submitting?

Yes, you may.

1. Click on Save and enter your email address to save the return.
2. Select the View and Print button

### After submitting my return, can I go back and print it?

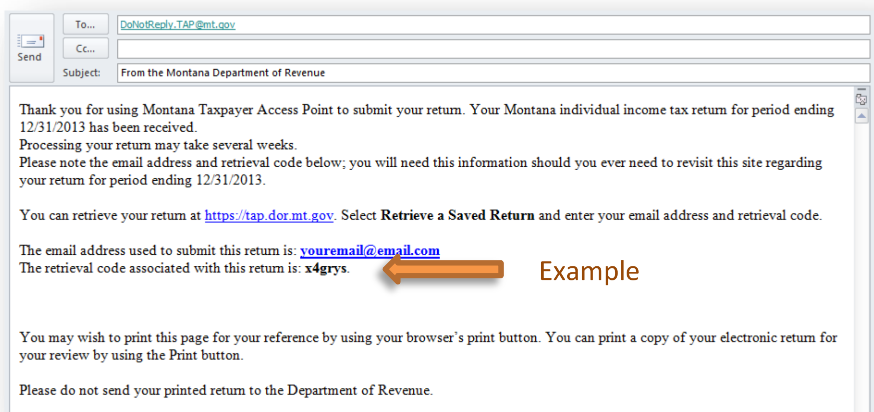
Yes, you may. Go to TAP & follow these steps:

3. Under Individual, select Retrieve a Saved Return
4. Enter your email address and the 6 digit alphanumeric retrieval code
5. Select Search
6. Select the View and Print button

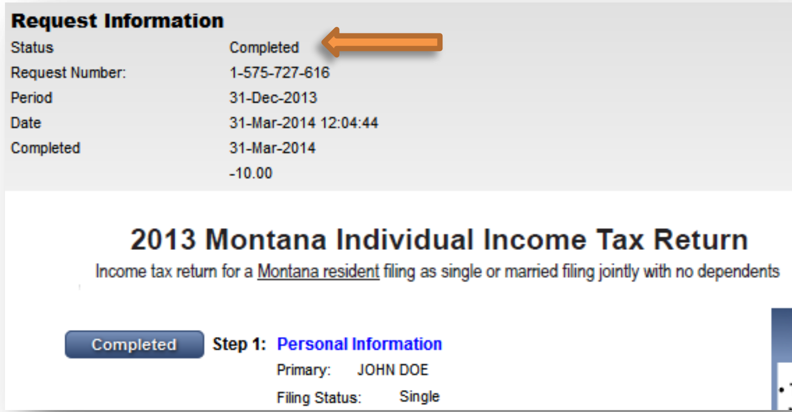
### I’ve submitted an individual income tax return, how can I tell if it has processed or what the status is?

Go to TAP & follow these steps:

1. Under Individual, select Retrieve a Saved Return
2. Enter your email address and the 6 digit alphanumeric retrieval code emailed to you at the time you saved your return




3. Select Search
4. When your return is retrieved you will see the status of the return in the upper portion of the screen
   - Stored – indicates that you have saved the return to complete later. To continue your return, select Change on the left side of the screen.
   - Pending - indicates that you have submitted the return and it has not loaded to our main tax system. Changes can be made until 5 pm on the day that you submitted the return.
   - Complete – The return has been loaded to our main tax system. If changes need to be made, an amended return is required.




### I have submitted my return, but realized I made an error. How can I fix it?

If the status of your return is pending, you may select Change or you may select Withdraw if you prefer to start your return again.

If you have submitted the return and the status is Complete, an amended return is required. Paper forms can be found in our downloadable forms.

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## WHERE'S MY REFUND?

### I have submitted my return, how do I check my refund?

Go to TAP & follow these steps:

4. Under Individual, select "Where's My Refund"
5. Enter your Social Security Number (SSN) and the amount you are expecting as a refund
6. You will see your status as your refund moves through our processing system

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## PAYMENTS WITHOUT A LOGIN ACCOUNT

### How do I make extension and estimated tax payments using TAP?

Follow these steps to make an extension or estimated tax payment:

1. On the main page of TAP, click the link Make a Payment.
2. You will be taken to 'Income Tax Express' to process your payment.
3. Select the Payment Type that you are making.
4. Enter the amount that you are paying.
5. Select the year that the payment is to be applied for.
6. Enter credit card or e-check information.

### Can I make an e-Check or ACH Debit payment?

Yes, however, you will be directed to 'Income Tax Express' to make this payment. There is no fee associated with this type of payment.

Follow these steps to make an e-Check or ACH Debit payment:

1. On the main page of TAP, click the link Make a Payment.
2. You will be taken to 'Income Tax Express' to process your payment.
3. Select the Payment Type that you are making.
4. Enter the amount that you are paying.
5. Select the year that the payment is to be applied for.
6. Enter e-check information.

## Can I make a payment by credit card using TAP?

Yes, however, you will be directed to 'Income Tax Express' to make this payment. There is a fee associated with this type of payment.

Follow these steps to make an e-Check or ACH Debit payment:

1. On the main page of TAP, click the link Make a Payment.
2. You will be taken to 'Income Tax Express' to process your payment.
3. Select the Payment Type that you are making.
4. Enter the amount that you are paying.
5. Select the year that the payment is to be applied for.
6. Enter your credit card information.

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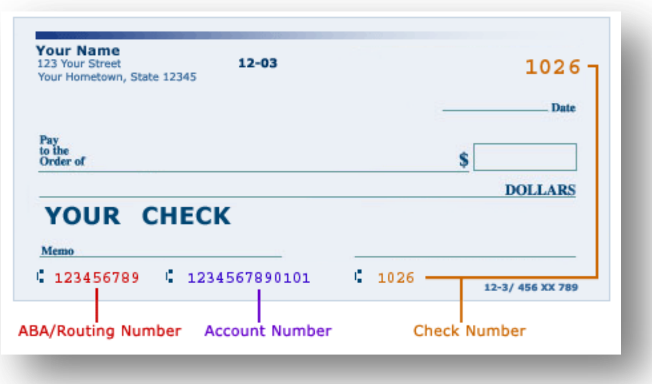
## I have tax due on my return but cannot pay it in full by the due date. Can I make a payment arrangement?

Payment arrangements can be requested by submitting Form ARC-1 (Request for a Payment Plan) by mail.

## How do I find my bank routing and account number?

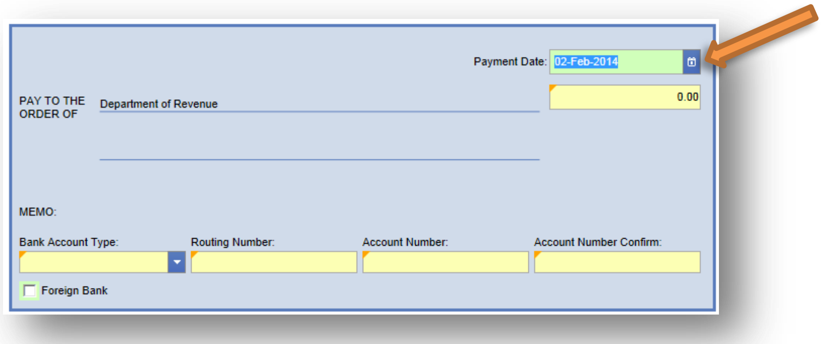



## What information will my bank need to process debit payment requests?

Some banks may need our payment authorization code: 3810302402

## Can I submit a payment to process on a future date?

Yes, ACH Debits and e-checks can be scheduled for a future date. When submitting an ACH Debit or e-check, select a date in the future up to 365 days.




### How long will it take for my payment to process?

Payments will usually post to your bank account within 3 to 5 business days.

### Why do you ask about accounts outside the U.S.?

We are unable to accept payments from an account outside the U.S. at this time.

## THIRD PARTY ACCESS

### What is third party access?

Third party access can be granted to an accountant, bookkeeper, tax preparer, or other professional that is conducting business on behalf of their client (tax account holder.) The tax account holder can grant different levels of access to their account. This access remains until the tax account holder removes or changes permission.

For more information on how to allow or not allow a representative third party access, please view the How do I permit or cancel third party access.

### Third party access options available in TAP

There are three levels of third party access a tax account holder can grant:

- Full access – edit name, address, file returns, submit payments and view previously filed returns and payments
- View– view previously filed returns and payment history
- View and File – view previously filed returns, view payment history, file returns, and submit payments

### How do I permit third party access?

If someone is requesting access to your account, such as an accountant, you will receive an email stating who requested access. If you choose not to grant access, no action is required. If you choose to grant access, follow the steps below.

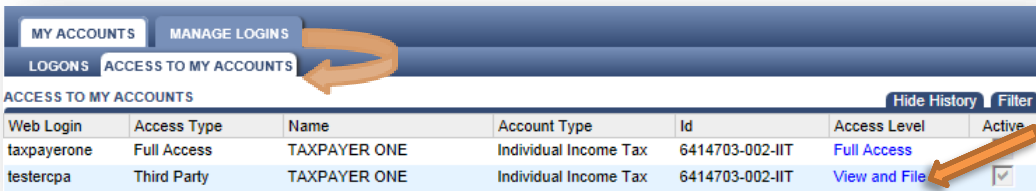
From the Home page of your TAP Account:

1. Select View My Profile

2. Select Manage Logins tab
3. Select Access to My Accounts tab
4. Select the link under the Access Level that pertains to the person who is requesting access Follow these steps:

a. Select the Access Level from the drop down box
   - Full access – edit name, address, file returns, submit payments and view previously filed returns and payments
   - View– view previously filed returns and payment history
   - View and File – view previously filed returns, view payment history, file returns, and submit payments

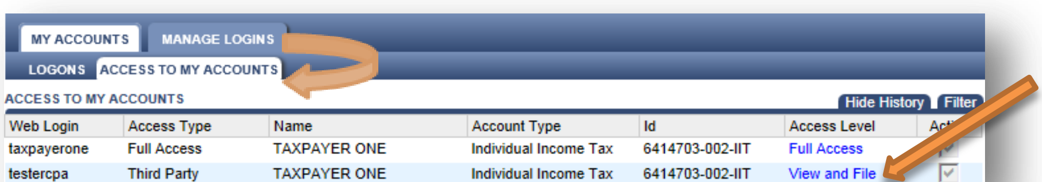
b. Check the Active box
c. Select Save

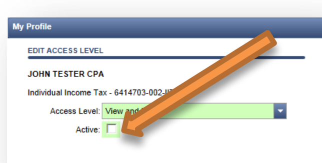



## How do I cancel third party access?

From the Home page of your TAP Account, you can remove or change third party access levels as follows:

1. Select View My Profile
2. Select  Manage Logins tab
3. Select Access to My Accounts tab
4. Select the link under the Access Level that pertains to the person who is requesting access.
5. Uncheck the Active box
6. Select Save




## I'm a Tax Preparer representing clients.  How do I sign up for TAP?

Follow these steps to sign up for TAP:

1. Go to the TAP web page. In the lower right corner of the screen under 'Sign up for Account Access'.
2. Click the button Sign up Now!
3. Enter the required information and select Submit.
   a. Reminder for Step 1, do not select an Account Type. Do Select yes for the *Are you a Professional Tax Preparer* and then enter your SSN or FEIN as requested

Within 5-10 minutes you will receive an authorization code by email and you may login to your account.

1. Login to TAP with your username, password and authorization code
2. Select Add Access to Another Account Follow the steps provided to add client accounts

### I'm a Tax Preparer, how do I access my client's account?

Your client must have TAP access to the account(s) before you can request access. Follow these steps to request your access:

1. Login to TAP
2. Select Add Access To Another Account
3. Select the Account Type from the drop down box you wish to access at Step 1
4. Select Profile Information at Step 2
   - Individual Income Tax – Enter your client's Social Security Number and Federal Adjusted Gross Income (Fed AGI) from their last return filed in Montana. If he/she only filed a 2EC last year, use the total gross household income from their Form 2EC line 1. Your client must have filed a return within the last 5 years to gain access to their tax account in TAP.
   - Business Income Tax, Miscellaneous Taxes, or Liquor Accounts – Enter your client's 13 digit alphanumeric Montana Tax Account ID, formatted as 1234567-890-XXX.
   - Wage Withholding – Enter your client's 13 digit Montana Tax Account ID, zip code, and either their FEIN, their last payment amount or their total wages paid subject to withholding from their most recent Form MW-3.
5. Select OK
6. Select Submit

An email will be sent to your client notifying them of your request to access their account(s). They must grant you access before you are able to view their account(s).

## PRINTING AND OTHER TAP ISSUES

### TAP doesn't seem to be working right. What should I do?

Previous visits to the TAP website will occasionally affect the way TAP functions in future visits. If you are sure that your computer follows the required settings listed above and you are still having problems with TAP, we recommend that you clear your 'cookies'. Select the link for the browser that you are using to learn how to remove 'cookies' that might be causing TAP issues:

Internet Explorer
Firefox
Google Chrome

## My browser signaled a pop-up blocker and I am not able to file. What should I do?

To use TAP, pop-ups must be allowed in your web browser. To disable pop-up blockers, click on the link below for your web browser, which will assist you if your pop-up blocker is disabled or how to disable your pop-up blocker if needed.

Internet Explorer
Firefox
Google Chrome
**For Other internet browsers** – use the help option.

## I am trying to view/print a letter or return but the document is not displaying. What should I do?

There are a few things you will need to check:

1. You will need the current version of Adobe Reader to view and print your copy. If you do not already have the current version of Adobe Reader installed on your computer, you may download the software for free here http://enable-javascript.com/
2. Your letter or return may open in a new window. Check to see if there is another open window containing your document.
3. You may also need to check your pop-up blockers. If you are not allowing pop ups from the TAP website, the document cannot be seen.
   a. To temporarily enable pop-ups, try holding the Ctrl key down while selecting Print.
   b. To enable pop-ups with your browser – click the following link for your browser to find out if pop-ups are enabled and how to enable them if they are not:
      Internet Explorer
      Firefox
      Google Chrome
      **For Other internet browsers** – use the help option.

## I am trying to view/print a letter or return but I keep receiving an error that says 'ViewFile.pdf couldn't be downloaded'. What does this mean and what do I do?

This issue is due to Internet Explorer 9 and Adobe Acrobat conflicts which we are working on correcting. To print the return at this time:

- Retrieve your return using another web browser such as Firefox or Google Chrome

  **OR**

- Select 'View and Print' and you will see a screen that says, 'If your return does not open automatically, click here'.
- Right click on the 'click here' link and select 'Save Target As'. Save this file to your computer where you can find it (your desktop is often the best option).
- Click on the file you just saved to open your return for viewing and printing.

## OPERATING SYSTEM AND BROWSER REQUIREMENTS

### What are the operating system and browser requirements to use TAP?

Operating system: There are no requirements. All systems should work as long as they can run a browser.

Browser requirements:

Internet Explorer 7+
Firefox 3+
Opera 10+ (and possibly lower versions)
Safari 5+ (and possibly lower versions)
Chrome IOS 3+
Android 2.1+

### What are my browsers required settings to use TAP?

128-bit encryption – this is standard on most web browsers.

JavaScript enabled – if you are unsure if JavaScript is enabled on your browser, click the following link to find out: http://enable-javascript.com/

Cookies enabled - if you are unsure if Cookies are enabled on your browser, click the following link to find out: http://www.whatarecookies.com/

Pop-ups enabled - click the following link for your browser to find out if pop-ups are enabled and how to enable them if they are not:

Internet Explorer
Firefox
Google Chrome

### What is required to view and print my return through TAP?

Adobe Reader – if you do not have Adobe Reader, it can be downloaded free by clicking on the following link: http://www.adobe.com/products/reader.html

## CONTACT THE DEPARTMENT OF REVENUE FOR ASSISTANCE

Call our **Citizen Services Call Center** for assistance with your individual, nonresident, or business tax questions. Our hours of service are Monday through Friday, 8 a.m. to 5 p.m. (Mountain Time)

| | |
|---|---|
| **In Helena** | 406-444-6900 |
| **Outside of Helena** | 1-866-859-2254 |
| **Telephone Device for the Deaf-TDD** | 406-444-2830 |
| **After hours/weekends:** | Citizen Services Email |