

March 20, 2014



Montana Tax News You Can Use

An e-newsletter for tax preparers and those interested in the state's tax system

Help us fight tax fraud

Tax refund theft is quickly becoming one of the country's most frequent types of fraud. We need your help to fight it.

Please let the department know if any of your clients have been notified by the IRS or another agency that they have been victims of identity theft. If they have been victims of identity theft, they could also become the targets of state tax refund theft. Once you notify us, we will place an identity theft indicator on your client's income tax account, and we will verify the return each year. The person to contact at DOR is auditor Rachael Brewer. Call her at 406-444-3372 or email rabrewer@mt.gov.

Office of Taxpayer Assistance

Have you heard about the Office of Taxpayer Assistance? It assists taxpayers when their communication with the Department of Revenue has broken down or when they are unable to resolve their problems through the department's normal channels.

The office handled about 190 cases last year. Referrals come from a variety of sources--directly from taxpayers, from tax preparers, the department director, auditors and collectors, our call center, the governor's office, other state agencies, the IRS, STAB, state legislators and even members of Congress.

If you encounter an issue with a client whereby communication with the department has broken down or become extremely difficult, call the department director's office at (406) 444-1900 or call Rich Bechtel, Director of the Office of Taxpayer Assistance and Public Outreach, at (406) 444-5845. To learn more, click [here](#) or e-mail Rich at

rbechtel@mt.gov.

Extended hours at the call center

Anyone who has questions about filing taxes can call the department's call center toll free at (866) 859-2254 or in Helena at 444-6900. Regular call center hours are Monday through Friday, 8 a.m. to 5 p.m.

We will be extending those hours during the last week of tax season. On April 10 and 11, we will be available from 7 a.m. to 6 p.m. On Saturday, April 12, we will be available from 10 a.m. to 2 p.m. And on April 14 and 15, we will be available from 7 a.m. to 8 p.m.

Checking the status of refunds

The Call Center has been receiving a number of calls from taxpayers wondering when they might get their refunds. Please let your clients know that they can check on the status of their refunds by going online to [Taxpayer Access Point \(TAP\)](#) and selecting *Where's My Refund?* Your clients will need their Social Security number and the amount of their refund on the 2013 tax return. They can find their refunds on:

- Line 74 of Form 2
- Line 65 of Form 2M
- Line 21 of Form 2EZ
- Line 13 of Form 2EC

Approved tax software for 2013

Every year tax software vendors seek approval to participate in the Montana federal/state electronic filing program. We test the software of each vendor to ensure that it's compatible with our electronic filing system. You can find the latest approval status of each product [here](#).

For more information, email dore-services@mt.gov.

Target tax dates

April 15: The deadline for...

- submitting an application for the Property Tax Assistance Program
- filing individual state income tax returns
- filing estate and trust income tax returns (Form FID-3)
- filing partnership returns (Form PR-1)
- filing disregarded entity returns (Form DER-1) for entities owned by partnerships


Tax facts

For 2014, as of March 14...

- Total number of individual income tax returns we've processed: 230,621
- Number of individual tax returns we've received electronically: 217,642
- Number of business returns we've received electronically: 13,912
- Number of individual income tax refunds we've issued: 197,821
- Average amount of refunds: \$403
- Total amount of refunds: \$79,721,863
- Average number of days it's taken us to issue a refund after receiving an electronic return: 3.5
- Average number of days it's taken us to issue a refund after receiving a paper return: 21
- Number of fraudulent tax returns we've intercepted: 119
- Amount in fraudulent refunds we've prevented: \$200,917

Contact us

Visit us online at revenue.mt.gov, email us at DORCustomerAssistance@mt.gov, or call us toll-free at (866) 859-2254 or in Helena at 444-6900.

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edited by [Ted Brewer](#)

Montana Tax News You Can Use is published weekly during tax season and periodically at other times. It is for anyone who helps people file taxes and meet their tax responsibility and for anyone simply interested in the state's tax system. It keeps you posted on what's happening at the department, lets you know about new ways of preparing and filing taxes and brings you up-to-date on some of the issues and trends popping up during tax season in Montana. To subscribe, please visit the [newsroom](#) page on our website and click on the "Tax News You Can Use" tab.

We welcome your suggestions and ideas for articles, as well as your questions and comments. Please send them to DORWritingProject@mt.gov.