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Montana Department of Revenue



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Governor

Tax Year 2015 Substitute Form Vendor Registration

- All vendors (primary & secondary) developing software that will produce State of Montana tax forms must complete a vendor registration annually. Complete all information fields.
- If you do not have a MT Vendor ID from the previous tax year, leave that field blank. MT DOR will send a confirmation email that you are a registered vendor, and will provide your MT Vendor ID in it.
- Select Submit to email the completed registration form.

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

- Primary - Vendors creating substitute forms
- Secondary - Vendors not creating forms, but using another company's form in their software package
 - What Primary Vendor is supplying forms to you? _____
- Secondary - Vendors using Montana's official form in their software

What software do you use to develop substitute vendor forms? _____

Are both the electronic (MeF) and paper product released to the public at the same time? _____

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

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

By submitting this registration, the software vendor 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 may 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
- Vendor will be contacted and expected to update and maintain their forms/software, and notify customers when changes have been made
- Provide customers with printing standards needed to produce original printed forms (no photocopies are accepted)

**Individual Income Tax, Vouchers
& Supplemental Forms**
Barcoded – Approval IS Required by MT DOR

- 2EC
- 2EZ (short form)
- 2
(Required with Form 2: Sched I – II)
- IT Payment Voucher
- EXT-15 Extension Payment Worksheet *w/ Voucher*
- AMD Amended Return Reconciliation Worksheet
- ENRG-B Alternative Energy System Credit
- ENRG-C Energy Conservation Installation Credit
- ETM Enrolled Tribal Member
- MHPE Mobile Home Park Exclusion
- MT-R Reciprocity Exemption from WTH (for ND residents working in MT)
- NOL MT Net Operating Loss

Individual Income Tax Supplemental Forms
Non-barcoded - Approval is NOT Required by MT DOR

- 2441-M Child & Dependent Care Expense Deduction
- AEPC Alternative Energy Production Credit
- AFCR Alternative Fuel Credit
- BBSC Biodiesel Blending & Storage Credit
- CC College Contribution Credit
- DCAC Dependent Care Assistance Credits
- DS-1 Disability Income Exclusion
- ECC Elderly Care Credit
- ELC Emergency Lodging Credit (Formerly TELC)
- ENRG-A Geothermal System Credit
- ESA Estimated Tax Annualization Worksheet
- EST-I Underpayment of Estimated Tax by Individuals, Estates & Trusts
- ESW-I Estimated Income Tax Worksheet
- FRM Farm & Ranch Risk Management Account
- FTB First-Time Home Buyer Savings Account
- HI Health Insurance for Uninsured Montanans Credit
- IUFC Infrastructure User Fee Credit
- MINE-CRED Mineral & Coal Exploration Incentive Credit
- MSA Montana Medical Care Savings Account
- NOL-Pre 99 Net Operating Loss Worksheet
- QEC Qualified Endowment Credit
- RCYL Recycling Credit/Deduction
- VT Veterans' Program Contribution & Deduction

**Corporate Income Tax, Voucher
& Supplemental Forms**
Barcoded – Approval IS Required by MT DOR

- CIT
(Required with CIT: Sched K – Apportionment Factors, Sched C – Tax Credits, Sched M – Affiliated Entities, Sched K – Combined for MT CIT, & Sched WE – Water's Edge)
- CT Payment Voucher
- MHPE Mobile Home Park Exclusion

Corporate Income Tax Supplemental Forms
Non-barcoded - Approval is NOT Required by MT DOR

- AEPC Alternative Energy Production Credit
- AFCR Alternative Fuel Credit
- BBSC Biodiesel Blending & Storage Credit
- CC College Contribution Credit
- CIT-UT Underpayment of Estimated Tax by Corporation
- CR-T Application for Tax Certificate
- DCAC Dependent Care Assistance Credits
- ELC Emergency Lodging Credit (Formerly TELC)
- ENRG-A Geothermal System Credit
- EXPT Tax-Exempt Status Request Form
- HI Health Insurance for Uninsured Montanans
- IUFC Infrastructure User Fee Credit
- MINE-CERT Application & Affidavit for Certification & Approval of Mineral & Coal Exploration Incentive Credits
- MINE-CRED Mineral & Coal Exploration Incentive Credit
- NEXUS Questionnaire
- QEC Qualified Endowment Credit
- RCYL Recycling Credit/Deduction
- RDF-CT Application to be Considered a Research & Development Firm

Withholding Form & Voucher
Barcoded – Approval IS Required by MT DOR

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

Withholding Supplemental Forms
Non-barcoded - Approval is NOT Required by MT DOR

- ETR ACH Credit Payment Registration (last revised 3/11)
- GenReg Registration for new accounts. Please direct clients to Taxpayer Access Point at <https://tap.dor.mt.gov>

Pass-Through Entity Tax, Vouchers & Supplemental Forms

Barcoded – Approval IS Required by MT DOR

- CLT-4S**
(Required with CLT-4S: Sched I - VI)
- SB Payment Voucher**
- Schedule K-1 (for CLT-4S)** Shareholder's Share of Income (Loss), Deductions, Credits, etc

- DER-1**
- DER Payment Voucher**

- PR-1**
(Required with PR-1: Sched I - 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
- PT-STM** Second Tier Pass-Through Entity Owner Statement

Pass-Through Entity Tax Supplemental Forms

Non-barcoded - Approval is NOT Required by MT DOR

- AEPC** Alternative Energy Production Credit
- AFCR** Alternative Fuel Credit
- BBSC** Biodiesel Blending & Storage Credit
- CC** College Contribution Credit
- DCAC** Dependent Care Assistance Credits
- ELC** Emergency Lodging Credit (Formerly TELC)
- HI** Health Insurance for Uninsured Montanans
- IUFC** Infrastructure User Fee Credit
- MINE-CERT** Application & Affidavit for Certification & Approval of Mineral & Coal Exploration Incentive Credit
- MINE-CRED** Mineral & Coal Exploration Incentive Credit
- NEXUS** Questionnaire
- QEC** Qualified Endowment Credit
- RCYL** Recycling Credit/Deduction

Fiduciary Tax, Voucher & Supplemental Forms

Barcoded – Approval IS Required by MT DOR

- FID-3**
(Required with Fid-3: Sched B – Deductions, Sched C – MDNI & MIDD, Sched D – Beneficiaries & Distributions, Sched E – Capital Gains, Sched F – Non Resident Est & Trust Tax, Sched G – Tax Paid to another State & Sched H – Special Transactions)

- FID Payment Voucher**
- EXT-FID** Extension Payment Worksheet *w/ Voucher*
- Schedule K-1** Beneficiary's Share of Income (Loss) Deductions, Credits, etc.

Fiduciary Tax Supplemental Forms

Non-barcoded - Approval is NOT Required by MT DOR

- EST-1** Underpayment of Estimated Tax by Individuals, Estates & Trusts
- ESW-FID** Estimated Income Tax Worksheet

Vendor Additional Information

Please provide any information that will help expedite your forms approval process

For example, if you do not support certain pages of a form, list the form name and the pages you do not support.