



Mike Kadas
Director

Montana Department of Revenue



Steve Bullock
Governor

Tax Year 2016 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? _____

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 all requested substitute forms test samples with all pages of the form included, 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)

MTDORsubstituteforms@mt.gov

Select Submit to email the completed Vendor Registration Form

Individual Income Tax, Vouchers & Supplemental Forms

- 2EC
- 2EZ (short form)
- 2
(Required with Form 2: Sched I – II)

- IT Payment Voucher
- EXT-I 2016 Extension Payment Worksheet *w/ Voucher*

- ETM Enrolled Tribal Member
- MHPE Mobile Home Park Exclusion
- MT-R Reciprocity Exemption from WTH (for ND residents working in MT)

Pass-Through Entity Tax, Vouchers & Supplemental Forms

- 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

Withholding Form & Voucher

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

Corporate Income Tax, Voucher & Supplemental Forms

- 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

Fiduciary Tax, Voucher & Supplemental Forms

- 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.

Vendor Additional Information

Don't support all pages on a form? List the form name and page numbers here:

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