



# State of Maine

Income Tax Letter of Intent

Tax Year 2024

August 14, 2024

This form must be completed and submitted to [Efile.Helpdesk@maine.gov](mailto:Efile.Helpdesk@maine.gov) by January 1, 2025

For any general questions about this LOI, please contact [Efile.Helpdesk@maine.gov](mailto:Efile.Helpdesk@maine.gov)

# 2024 Tax Software Provider Maine Revenue Services Letter of Intent

Welcome to the Income Tax Letter of Intent (LOI). If your software company intends to submit electronic and/or paper returns to Maine Revenue Services you will need to complete this form and submit it to Efile Helpdesk at [Efile.Helpdesk@maine.gov](mailto:Efile.Helpdesk@maine.gov) no later than January 1, 2025.

By submitting this Letter of Intent (LOI) to Maine Revenue Services, you agree to meet our standards for software provider registration, tax preparation software, and substitute forms. If you do not meet the standards and requirements explained in this LOI or provide an incomplete form, we may deny your application or revoke your approved software provider status and reject all electronic and/or paper returns submitted using your products.

You must complete a separate LOI for each unique product your company offers.

**Note:** If you are a new Software Provider who has not filed city/state income tax returns with any city or state agencies, you must have passed assurance testing with the IRS. Attach documentation from the IRS demonstrating you have successfully tested with the IRS.

## Important dates

Maine Revenue Services has important key dates to ensure we are ready for the filing season and taxpayers can file an accurate and timely tax return. Please note the following key dates:

- Complete and submit this LOI by the firm due date of January 1, 2025.
- Substitute forms approval must be completed by March 1, 2025.
- Assurance testing (ATS) begins on TBD.
- The last day we will accept initial e-file ATS tests is the firm due date of February 1, 2025.

## Amended Letter of Intent

Check this box if this is an amended Letter of Intent.

Reason for amendment:

## Company information

List your company information.

Name of Company	Product Name	State Issued Software ID (if applicable)
DBA Name	NACTP Vendor ID	State Tax Account Number (if applicable)
Address	Product URL	Company FEIN
City	State	Zip Code

List your other product names using the same calculation engines here: **Note:** The same calculation engine is defined as products that use the same calculation engine and support all the same forms and schedules.

## IRS issued electronic identification numbers

List your IRS electronic identification numbers.

	EFIN(s)	ETIN(s)
<b>Individual Tax</b>	Test EFIN(s)	Test ETIN(s)
	Production EFIN(s)	Production ETIN(s)
<b>Business Tax</b>	Test EFIN(s)	Test ETIN(s)
	Production EFIN(s)	Production ETIN(s)

## Contact information

List the contact information for each area identified.

Regulatory/Compliance Primary Contact	Phone	Email Address
Secondary Regulatory/Compliance Contact	Phone	Email Address
Primary Individual MeF Contact	Phone	Email Address
Secondary Individual MeF Contact	Phone	Email Address
Primary Business MeF Contact	Phone	Email Address
Secondary Business MeF Contact	Phone	Email Address
Primary Fiduciary (Estate/Trust) MeF Contact	Phone	Email Address
Secondary Fiduciary (Estate/Trust) MeF Contact	Phone	Email Address
Primary Leads Reporting Contact	Phone	Email Address
Secondary Leads Reporting Contact	Phone	Email Address

## Substitute forms (paper forms) registration

Complete this section only if your product will provide substitute forms.

Agency Substitute Forms Software Number		
Primary Individual Forms Contact	Phone	Email Address
Secondary Individual Forms Contact	Phone	Email Address
Primary Business Forms Contact	Phone	Email Address
Secondary Business Forms Contact	Phone	Email Address
<b>Note:</b> If you have separate contacts for each business tax type, please list them by tax type on a separate sheet and attach it to this submission.		

## Software products and tax types supported

Check all that apply.

Type of software product supported	
DIY/consumer (Web-Based)	<input type="checkbox"/>
DIY/consumer (Desktop)	<input type="checkbox"/>
Professional/paid preparer (Web-Based)	<input type="checkbox"/>
Professional/paid preparer (Desktop)	<input type="checkbox"/>

Tax types supported	
Individual income tax	<input type="checkbox"/> e-file <input type="checkbox"/> Substitute Forms
Estate/Trust/Fiduciary tax	<input type="checkbox"/> e-file <input type="checkbox"/> Substitute Forms
Corporation/Franchise tax	<input type="checkbox"/> e-file <input type="checkbox"/> Substitute Forms
Pass-Through Partnerships/S-Corporation	<input type="checkbox"/> e-file <input type="checkbox"/> Substitute Forms

Support PDF attachments (MeF ONLY)	
1040ME - Individual income tax	<input type="checkbox"/> e-file only
1041ME - Estate/Trust/Fiduciary tax	<input type="checkbox"/> e-file only
1120ME - Corporate income tax	<input type="checkbox"/> e-file only
941P-ME - Pass-Through Partnerships/S-Corporation	<input type="checkbox"/> e-file only

## Rebranded software products

Complete this section only if your product is rebranded.

For software to be considered rebranded, changes cannot be made to the software requirements and output(s). As the Software company selling and/or licensing your product to a third-party, it is your responsibility to make sure the rebranded product reflects the current software requirements and output(s). List each of your rebranded products below.

Use one of the following class codes for each product:

Rebranded Product Name	ETIN (if applicable)	Contact Person	Phone	Email Address
Rebranded Product Name	ETIN (if applicable)	Contact Person	Phone	Email Address
Rebranded Product Name	ETIN (if applicable)	Contact Person	Phone	Email Address
Rebranded Product Name	ETIN (if applicable)	Contact Person	Phone	Email Address
Rebranded Product Name	ETIN (if applicable)	Contact Person	Phone	Email Address

Attach additional sheets if needed.

For Rebranded Products, Maine Revenue Services has the following requirements for e-file ATS approval:

- Rebranded Products are required to complete an abbreviated e-file ATS approval process

## E-file mandates or requirements

N/A

## Forms and schedules supported by tax type (check all that apply)

Check the boxes of the forms and schedules your company supports.

<b>Maine Individual Tax 1040ME</b>	<b>e-file</b>	<b>Forms</b>
<b>Form 1040ME</b> (ME Individual Income Tax Form)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule 1A</b> (Income Modifications – Additions)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule 1S</b> (Income Modifications – Subtractions)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule 2</b> (Itemized Deductions)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule A</b> (Adjustment to Tax)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule CP</b> (Voluntary Contributions/Park Passes)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form 2210ME</b> (Underpayment of Estimated Tax)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Worksheet A</b> (Residency Information)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Worksheet B</b> (Income Allocation)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form 2210ME Annualized Income Worksheet</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule ETM</b> (Enrolled Tribal Member)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule NR</b> (Nonresident Credit)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule NRH</b> (Nonresident Credit for Married Electing to File Single)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule PTFC/STFC</b> (Property Tax Fairness Credit/Sales Tax Fairness Credit)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Maine Schedule A Worksheets</b>	<b>e-file</b>	<b>Forms</b>
Adult Dependent Care Credit	<input type="checkbox"/>	<input type="checkbox"/>
Child Care Credit	<input type="checkbox"/>	<input type="checkbox"/>
Dependent Exemption Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>
Earned Income Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>
Employer Credit for Family and Medical Leave	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer Firefighter / EMS Credit	<input type="checkbox"/>	<input type="checkbox"/>
Income Taxes Paid to Other Jurisdictions	<input type="checkbox"/>	<input type="checkbox"/>
Maine Seed Capital Credit	<input type="checkbox"/>	<input type="checkbox"/>
Pine Tree Development Zone Credit	<input type="checkbox"/>	<input type="checkbox"/>
PTZE Credit Ratio Worksheet	<input type="checkbox"/>	<input type="checkbox"/>
Rehabilitation of Historic Properties	<input type="checkbox"/>	<input type="checkbox"/>
Student Loan Repayment Tax Credit / Payment Schedule	<input type="checkbox"/>	<input type="checkbox"/>
Wellness Program Credit	<input type="checkbox"/>	<input type="checkbox"/>
Wks Schedule 1S - Pension Deduction Worksheet	<input type="checkbox"/>	<input type="checkbox"/>
Wks Schedule 1S - Other Subtraction Mod Credits	<input type="checkbox"/>	<input type="checkbox"/>
Wks Schedule A - Other Tax Credits	<input type="checkbox"/>	

1040ME PTFC/STFC Only Returns	<input type="checkbox"/>	<input type="checkbox"/>
Maine / Federal Individual Income Statements	e-file	Forms
Form W-2 (Wage and Tax Statement)	<input type="checkbox"/>	<input type="checkbox"/>
Form W-2G (Certain Gambling Winnings)	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099Misc (Miscellaneous Income)	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099Int (Interest Income)	<input type="checkbox"/>	
Form 1099G (Certain Gov Payments)	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099DIV (Dividends and Distributions)	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099NEC (Non-employee Compensation)	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099OID (Int and Orig Issue Discount)	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099B (Proceeds from Broker/Barter Exch.)	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099R (Dist. From Pensions, Annuities)	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099ME (ME Pass-through Withholding)	<input type="checkbox"/>	<input type="checkbox"/>
Reserved for Additional Forms * (Complete only after receiving	<input type="checkbox"/>	<input type="checkbox"/>
Communication from Maine Revenue Services regarding new forms)	<input type="checkbox"/>	<input type="checkbox"/>
<b>TENTATIVE 2024</b> Credit for Paper Manufacturing Facility Investment Worksheet	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

<b>Maine Fiduciary Tax 1041ME</b>	<b>e-file</b>	<b>Forms</b>
<b>Form 1041ME</b> (Resident and Nonresident Estate and Trusts)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule 1</b> (Fiduciary Adjustment)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule 2</b> (Allocation of Fed/ME source Inc)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule A</b> (Adjustments to Tax)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form 2210ME</b> (Underpayment of Est Tax)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form 2210ME Annualized Income Worksheet</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule NR</b> (Nonresident Credit)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Fiduciary Worksheets</b>	<b>e-file</b>	<b>Forms</b>
Employer Credit for Family and Medical Leave	<input type="checkbox"/>	<input type="checkbox"/>
Income Taxes Paid to Other Jurisdictions ( <b>Formerly Schedule 3</b> )	<input type="checkbox"/>	<input type="checkbox"/>
Maine Capital Investment Credit		<input type="checkbox"/>
Maine Seed Capital Credit	<input type="checkbox"/>	<input type="checkbox"/>
Pine Tree Development Zone Credit	<input type="checkbox"/>	<input type="checkbox"/>
PTZE Credit Ration Worksheet	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer Firefighter / EMS Credit	<input type="checkbox"/>	<input type="checkbox"/>
<b>Maine / Federal Fiduciary Income Statements</b>	<b>e-file</b>	<b>Forms</b>
<b>Form W-2</b> (Wage and Tax Statement)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form W-2G</b> (Certain Gambling Winnings)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form 1099ME</b> (Maine Pass-through Withholding)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form 1099R</b> (Dist. From Pensions, Annuities)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Reserved for Additional Forms * (Complete only after receiving</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Communication from Maine Revenue Services regarding new forms)</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>NEW 2024</b> Income Taxes Paid to Other Jurisdictions ( <b>Formerly Schedule 3</b> )	<input type="checkbox"/>	<input type="checkbox"/>
<b>TENTATIVE 24</b> Credit for Paper Manufacturing Facility Investment Worksheet	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>



<b>Maine Corporate Tax 1120ME</b>	<b>e-file</b>	<b>Forms</b>
<b>Form 1120ME</b> (Corporate Income Tax - Includes Schedule A)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule 1S</b> (Income Subtraction Modifications)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule 1A</b> (Income Addition Modifications)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule C</b> (Tax Credits for Corporations)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Minimum Tax Credit Worksheet</b> (Formerly Schedule D)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule X Amended Returns Adjustment</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule NOL</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form CR</b> (Combined Report for Unitary Members)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form 2220ME</b> (Underpayment of Estimated Tax)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form 2220ME Annualized Income Worksheet</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Corporate Worksheets</b>	<b>e-file</b>	<b>Forms</b>
Capital Investment Credit	<input type="checkbox"/>	<input type="checkbox"/>
Employer Credit for Family and Medical Leave	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer Firefighter / EMS Credit	<input type="checkbox"/>	<input type="checkbox"/>
Pine Tree Development Zone Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>
Rehabilitation of Historic Properties Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>
Maine Seed Capital Investment Credit	<input type="checkbox"/>	<input type="checkbox"/>
Wellness Credit	<input type="checkbox"/>	<input type="checkbox"/>
<b>Maine / Federal Corporate Income Statements</b>	<b>e-file</b>	<b>Forms</b>
<b>Form W-2G</b> (Certain Gambling Winnings)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Form 1099ME</b> (Maine Pass-through Withholding)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Maine Pass-Through Partnership/S-Corp 941P-ME</b>	<b>e-file</b>	<b>Forms</b>
<b>Form 941P-ME</b> (ME Pass-through Withholding)(Includes Sch 2P and Sch 3P)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Reserved for Additional Forms * (Complete only after receiving</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Communication from Maine Revenue Services regarding new forms)</b>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

## Electronic Amended returns

Maine Revenue Services requests you support electronic amended returns for those available through MeF.

Amended returns supported: 1040ME  1041ME  1120ME  941P-ME

<b>ADDITIONAL PAPER FORMS</b>			
<b>INDIVIDUAL INCOME TAX</b>		<b>ESTATE TAX</b>	
Form 1040L-ME <b>2D BARCODE</b>	<input type="checkbox"/>	706ME	<input type="checkbox"/>
1040EXT-ME	<input type="checkbox"/>	700SOV	<input type="checkbox"/>
1040ES-ME <b>2D BARCODE</b>	<input type="checkbox"/>		
1040ES-ME	<input type="checkbox"/>	<b>MISCELLANEOUS INCOME TAX</b>	
1040PV <b>2D BARCODE</b>	<input type="checkbox"/>	REW-1-1040	<input type="checkbox"/>
1040PV	<input type="checkbox"/>	REW-1-1041	<input type="checkbox"/>
		REW-1-1120	<input type="checkbox"/>
<b>COMPOSITE INCOME TAX</b>			
1040C-ME <b>2D BARCODE</b>	<input type="checkbox"/>	<b>PAYROLL TAX FORMS</b>	
1040PA-ME (FORM PAR) <b>2D BARCODE</b>	<input type="checkbox"/>	901ES-ME	<input type="checkbox"/>
1040PA-ME (SCHEDULE PAR-1) <b>2D BARCODE</b>	<input type="checkbox"/>	ME UC1PV	<input type="checkbox"/>
		ME UC1 <b>2D BARCODE</b>	<input type="checkbox"/>
<b>FIDUCIARY INCOME TAX</b>		ME UC1	<input type="checkbox"/>
1041-ME	<input type="checkbox"/>	ME UC1 SCH2 <b>2D BARCODE</b>	<input type="checkbox"/>
1041-ME SCH A	<input type="checkbox"/>	MEUC1 SCH2	<input type="checkbox"/>
1041EXT-ME	<input type="checkbox"/>	941ME	<input type="checkbox"/>
1041ES_ME	<input type="checkbox"/>	941ME SCH1	<input type="checkbox"/>
1041PV	<input type="checkbox"/>	941ME SCH2	<input type="checkbox"/>
		941P-ME <b>2D BARCODE</b>	<input type="checkbox"/>
<b>CORPORATE INCOME TAX</b>		941P-ME SCH2P <b>2D BARCODE</b>	<input type="checkbox"/>
1120ME <b>2D BARCODE</b>	<input type="checkbox"/>	941P-ME SCH3P <b>2D BARCODE</b>	<input type="checkbox"/>
FORM CR <b>2D BARCODE</b>	<input type="checkbox"/>		
1120EXT-ME	<input type="checkbox"/>	941PV	<input type="checkbox"/>
1120ES-ME	<input type="checkbox"/>		<input type="checkbox"/>
1120PV	<input type="checkbox"/>		
		<b>SALES TAX FORMS</b>	
<b>FRANCHISE TAX</b>		ST-7	<input type="checkbox"/>
1120B-ME	<input type="checkbox"/>	BUSE ST-7U	<input type="checkbox"/>
1120B-ES-ME	<input type="checkbox"/>	SPT1	<input type="checkbox"/>
1120B-EXT-ME	<input type="checkbox"/>		
		<b>CANNIBAS TAX FORMS</b>	
<b>INSURANCE PREMIUMS TAX</b>		CANNIBAS EXCISE TAX	<input type="checkbox"/>
INS-1	<input type="checkbox"/>		
INS-2	<input type="checkbox"/>	<b>BUSINESS EQUIPMENT TAX REIMBURSEMENT</b>	
INS-4	<input type="checkbox"/>	800	<input type="checkbox"/>
INS-5	<input type="checkbox"/>		
INS-6	<input type="checkbox"/>		
INS-7	<input type="checkbox"/>		

## Other forms – please list:

If you are requesting a 2D Waiver, please email your request to [VendorForms.MRS@maine.gov](mailto:VendorForms.MRS@maine.gov)

## Agency requirements

This section identifies agency requirements and expectations of new and existing Software Providers and the software product.

### Issue notification and resolution requirements

- When the Industry Partner finds an issue with their software, Maine Revenue Services should be notified within 48 hours of the finding at [Efile.Helpdesk@maine.gov](mailto:Efile.Helpdesk@maine.gov). We also would like to know how this issue is communicated to the customer using the software.
- When there is an issue found within a software product and we reach out to the Industry Partner we suggest a resolution to be done within 48 hours. If more time is needed, please notify Maine Revenue Services at [Efile.Helpdesk@maine.gov](mailto:Efile.Helpdesk@maine.gov) as to when this issue will be resolved.
- Notify Maine Revenue Services if any forms and/or payments you support are not ready during the filing season after agency approval. Submit this information via email to [Efile.Helpdesk@maine.gov](mailto:Efile.Helpdesk@maine.gov) and include the date the electronic or paper product will be ready to submit.

### System security requirements

The Maine Revenue Services does not prescribe the security requirements for your system. You are responsible for implementing appropriate security measures to protect taxpayers and their information in your system. You must apply security measures to protect taxpayer information in your system when it is on-line, off-line, at rest, and in transit.

### Security incident requirements

Unless otherwise prohibited by law, all data breaches, security incidents, or other improper disclosures of taxpayer data must be promptly reported to the Office of the Maine Attorney General and must also be reported to the State of Maine/Maine Revenue Services at the following: [MRSOpsSecurity@maine.gov](mailto:MRSOpsSecurity@maine.gov) and [Efile.Helpdesk@maine.gov](mailto:Efile.Helpdesk@maine.gov).

### Production return submission requirements

All returns generated from this software must be e-filed or printed from the approved software or a subsequent product update.

- Do not add or include secured or password protected PDF attachments to the return when submitting.

### Product updates requirements

Desktop product users who attempt to file 10 or more business days after a production release must be required to download and apply the product update.

### Schemas

Your software must adhere to the schema requirements. Maine Revenue Services schema information and requirements can be found on the State Exchange System website.

## Testing and submissions

All e-file ATS and substitute forms tests submitted during the approval process must be created in and originate from the actual software.

## Software limitations

Provide any software limitations to forms or schedules you support during ATS. Failure to provide this information could delay the review of your test returns.

## Software exceptions

Provide any exceptions to forms or schedules you support based on the type of software during ATS. Example, a DIY product does not support the same schedules as a professional product. Failure to provide this information could delay the review of your test returns.

## Customer Notices

This section identifies information Maine Revenue Services is requiring the software providers to communicate with customers.

### Disclosure and use of information language expectations

You must include the following consent language with electronic filing software.

#### **For Do-It-Yourself software:**

*By using a computer system and software to prepare and file my tax return(s) electronically, I consent to the transmission of my return(s) and to the disclosure of all information about my use of the system and software to the State of Maine/Maine Revenue Services.*

#### **For Tax Professional software:**

*By using a computer system and software to prepare and file my client's return(s), I consent to the transmission of my client's return(s) and to the disclosure of all information about my use of the system and software to the State of Maine/Maine Revenue Services.*

#### **For Business software:**

*By using a computer system and software to prepare and file this business tax return(s), I consent to the transmission of the return(s) and to the disclosure of all information about the use of the system and software to the State of Maine/Maine Revenue Services.*

### Driver's license/ID card expectations

Maine Revenue Services is providing the following expectations and information:

#### **For e-file returns:**

Maine Revenue Services requests the DL/ID card be included with the return but won't reject the return if it's not included.

#### **For printed/paper forms requesting the DL/ID Card information:**

Maine Revenue Services does not require the full DL/ID card information on the form(s)

### **Refund expectations**

State of Maine/Maine Revenue Services is providing a URL and/or a statement for refund processing. All Do It Yourself (DIY) and Tax Professional software packages must include this information in your software. The message is expected to be displayed within the software in a way to maximize the likelihood the message is read.

**URL:** <https://revenue.maine.gov/>

- **Statement:** Want to check the status of your Maine state tax refund? With the Maine Tax Portal, checking your refund status is easy, convenient, and accessible 24/7. To check on the status of your refund, go to [revenue.maine.gov](https://revenue.maine.gov), and under Individuals, select “Where’s My Refund?” and follow the prompts. You do not need to log in to check for your Maine State tax refund through the Maine Tax Portal.

### **Taxes due expectations**

State of Maine/Maine Revenue Services is providing a URL and/or a statement about taxes due, such as due dates and payment methods. All Do It Yourself (DIY) and Tax Professional software packages must include this information in your software. The message is expected to be displayed within the software in a way to maximize the likelihood the message is read.

**URL:** <https://www.maine.gov/revenue/tax-return-forms/due-dates>

**Statement:** Estimate payments and ACH payments CANNOT be cancelled by the State of Maine/Maine Revenue Services once the return has been submitted.

## Agency questions

1. Do you support unlinked jurisdictional returns?

a. Yes

b. No

2. What refund products or payment vehicles do you offer your customers? If you partner with an entity to provide refunds (e.g., Amazon.com or other pre-paid cards), please provide the names and bank routing numbers (RTNs) of each company. Attach a separate sheet if necessary.

REFUND PRODUCT NAME	ROUTING NUMBER	NOTES

3. Please provide the main contact names, phone numbers, and email addresses of the refund products or payment vehicles offered to your customers. Please attach an additional sheet if necessary.

PRODUCT NAME	CONTACT PERSON	PHONE NUMBER	EMAIL ADDRESS

4. The State of Maine/Maine Revenue Services does not want to receive Taxes Paid to Other States (TPOS) data when applicable. Will your company support the TPOS schema for this filing season?

5. Do you require your users/customers to download and apply product updates in order for the users/customers to continue to electronically file and/or print tax returns with your software? Please explain the timeline and process for this once an update is available for your product.

6. If a problem is discovered with the software, are taxpayers and practitioners still able to submit returns? If they are not allowed to submit returns, how are they notified when the fix has been implemented?

7. Are software updates, both required and optional, automatically or manually applied?

## Acknowledgments and Signature

By signing this agreement, I agree to provide true, accurate, current, and complete information and my company agrees to all of the requirements listed in this document.

The **State of Maine/Maine Revenue Services** reserves the right to deny, suspend or terminate my company's ability to submit returns.

AUTHORIZED REPRESENTATIVE PRINTED NAME	AUTHORIZED REPRESENTATIVE EMAIL ADDRESS	
AUTHORIZED REPRESENTATIVE SIGNATURE	AUTHORIZED REPRESENTATIVE PHONE NUMBER	DATE



