

Montana Department of Revenue

2021 Substitute Form Registration

- All companies (primary & secondary) that will reproduce State of Montana tax forms must complete a substitute form registration annually. Complete all information fields.
- If you do not have a MT Software Provider ID from the previous tax year, leave that field blank. We will send a confirmation email to provide you with a MT Software Provider ID.
- Please review form testing and submission changes in the 2021 Montana DOR Specifications for Reproducing Substitute Scannable Tax Forms and Payment Vouchers (available on the FTA State Exchange System)

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

- Primary – Software Provider creating substitute forms
- Secondary – Software Provider using another company’s form in their software package
 - What Primary Company is supplying forms to you? _____
- Secondary – Software Providers using Montana’s official form in their software

Montana provides testing templates to help you verify data placement prior to submitting forms for testing.

Testing form submissions will be rejected if the form data placement was not verified using the testing templates.

If you require assistance, please email MTDORSubstituteForms@mt.gov.

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

Primary Contact		Email Address	
Phone Number	Extension	Fax	
Secondary Contact		Email Address	
Phone Number	Extension	Fax	

By submitting this registration, the software company will meet the following requirements:

- 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
- Verify data placement prior to submitting forms for testing, and correct any errors found on test forms and re-submit for approval
- Failure to follow the specifications may result in completed tax forms submitted by the public being rejected by the MT Department of Revenue
- Software provider will be contacted and expected to update and maintain their forms/software as well as notify customers when changes have been made
- Provide customers with printing standards needed to produce original printed forms (no photocopies are accepted)
- By submitting this registration form to the department, you are agreeing to meet our standards for software provider registration, conditions stated in the Montana LOIs, tax preparation software (DIY or professional), and substitute forms.
- The software provider will not release substitute forms into production before successfully completing all required testing and an approval has been issued for the entire software product. Software products released for production must adhere to all return specifications, business rules and Montana publications. The software provider will not advertise Montana’s acceptance of software until testing approval is provided. Montana will not accept returns prior to completion of software product approval

Please send your completed registration form to: MTDORsubstituteforms@mt.gov

Individual Income Tax, Vouchers & Supplemental Forms

- Form 2** – Requires all schedules on pages 1-12
- Montana K-1** - Image Only - Required
- NOL** – Net Operating Loss - Image Only - Required
- IT Payment Voucher**
- ETM** – Enrolled Tribal Member
- MHPE** – Mobile Home Park Exclusion – Image Only

Withholding Form & Voucher

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

Corporate Income Tax, Voucher & Supplemental Form

- CIT** (Requires Sch K, Sch C, Sch NOL, CIT-UT)
- Combined** (Also requires Sch M, Sch WE, Sch K)
- CT Payment Voucher**
- Supplemental Forms** (See CIT Business Rules for required forms) - Image Only

Fiduciary Tax, Voucher & Supplemental Form

- FID-3** (Required with FID-3: Schedules A-H, Montana Sch K-1 (for FID) Beneficiary's Share of Income (Loss), Deductions, Credits, etc., Montana Form NOL)
- FID Payment Voucher**

Submit

Pass-Through Entity and Composite Tax Return (PTE), Vouchers & Supplemental Forms

- Form PTE** (Requires Schedules I, II, IV, VII, DE, K-1, Montana Source Income, and the Montana Adjustments Worksheet)
- SB Payment Voucher**
- DER-1** (Required with DER-1: Sched I)
- DER Payment Voucher**
- PR Payment Voucher**
- PT-AGR** – Pass-Through Entity Owner Tax Agreement
- Supplemental forms** (See PTE Business Rules for required forms) - Image Only
 - AEPC**
 - AFCR**
 - BBSC**
 - CC**
 - DCAC**
 - HI**
 - RCYL**
 - ELC**
 - MINECRED**
 - IUFC**

Required Forms Additional Information

Montana forms will require including the supporting schedules, work sheets and supplemental forms.

An **Image Only** form does not have to be submitted for data placement testing. It will be attached to the return as an image.

Review Montana business rules for requirements. If you would like to request a limitation approval, state the limitation below. Limitations must match the approved electronic return limitations.

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