



**MeF ATS Testing Instructions
and Scenario Criteria**

Individual Income Tax

2023

October 30, 2023
v1.2



Contents

Introduction	3
Testing Deadlines	3
Submitting ATS test cases	3
Resubmitting failed ATS test cases	4
Test 1.....	5
Test 2.....	7
Test 3.....	8
Test 4.....	9
Test 5.....	10
Test 6.....	11
Test 7.....	12
Test 8.....	13
Test 9.....	14
Test 10.....	15
Test 11.....	16
Change Log.....	17

Introduction

The following pages include 11 ATS test scenarios and a list of the line items to be completed for each test. The line numbers listed in the table for each scenario are for the Form 2 . The data submitted for the indicated lines will be determined by the developer, except where specifically noted. The lines listed are the minimum amount of information we expect to see on the return.

Our testing environment will be available for developers to submit returns against to test reject codes, communication, acknowledgements or other reasons. MT DOR will not review any returns until we receive an email at DORMeFTest@mt.gov with all of the required information submitted.

Testing Deadlines

Initial submissions for Form 2 testing must be received by **December 15, 2023** and the testing completed by **January 16, 2024**.

In some instances, the email with the test returns will not make it through to the DORMeFTest mail box due to size limits or firewall constraints. If you're having trouble with emails, there is the option of sending your files securely through ePass Montana at transfer.mt.gov. Contact DOR QA at DORMeFTest@mt.gov for more information.

Submitting ATS test cases

After you have received an acceptance acknowledgment from MT DOR for each of the test submissions

IDs:

Send an email to DORMeFTest@mt.gov with the following information:

- Montana Form name (Form 2)
- Name of software company
- Name of software product
- State submission IDs and ATS Test number for the ID
- A pdf return must be provided for each submission ID.
 - ◆ A comparison is performed to ensure the paper copy of a return contains the same information submitted to MT DOR by e-file.
 - ◆ Include your ETIN and test return number in the file name. (Example: 125345Test2.pdf)
- Provide all test case information at the same time. Partial submissions will not be reviewed.
- **Do not send your test information to MT DOR until you receive an acknowledgement of their acceptance.**
- **Do not send more than one tax type per email.**
- Limitation/exception documentation not included in the LOI.

Once MT DOR receives the email with the required information, a tester will be assigned to complete the review. Testing is assigned on a first-come, first-serve basis. You will receive an email when your submission has been assigned a tester. Reviews will be completed, generally, within 5-7 business days from the date a tester was assigned.

When the review is complete, MT DOR will send the submitter a test summary document Identifying any needed corrections. After all corrections are made by the developer, ATS test cases can be resubmitted for review.

Introduction (cont.)

Resubmitting failed ATS test cases

- You will only need to resubmit tests that were identified with failures on the Test Summary unless you are notified otherwise.
- Make all corrections identified on the Test Summary
- **Do not** resubmit until all your questions are answered. Partial submissions will not be reviewed.
- **Do not** send your resubmission email until after you have received an acceptance acknowledgment from MT DOR for each of the submission IDs.

Test Scenarios

This document includes eleven (11) test scenarios.

Each test scenario will include the line item that should be completed for that test scenario. The line item corresponds to Form 2.

Some line numbers are followed by 'P', 'S' or 'P/S', indicating who should be represented in the filing;

'P' indicates primary filer

'S' indicates spouse

'P/S' indicates both primary and spouse.

There are some instances of testing negative values. The lines for a negative value will be bolded in red.

The line numbers indicated in these test scenarios are the minimum amount of information expected.

Any additional information can be tested as well.

NOTE: Data submitted for the lines indicated will be determined by the developer unless otherwise noted.

Test 1: Form 2

Douglas F. Heffernan is single, full year resident who has one dependent. He received the earned income tax credit. He works for a restaurant and a beverage cart and received tips and received unemployment benefits. He has wages from jobs in Montana, Oregon and Idaho and is claiming credit for taxes paid to two states. He receives alimony after his divorce that was finalized April 15th of 2018. He had a state refund that was taxable on the federal return as well as a refund of local income tax. Since he took a deduction for local income tax in the prior year, the refund of local income tax is taxable to Montana. He also has a taxable federal refund. Douglas made a non-qualified withdrawal from his medical care savings account. Douglas paid additional federal tax for a 2021 amended return.

Forms: Form 2, W2 (4), 1099-G (1)

Attachments: Oregon tax return; Idaho tax return

Taxpayer: Douglas F. Heffernan

SSN: 400-00-6001

DOB: 03/21/1989

Address: 400 Hansen Ave
Fallon, MT 59326

Filing Status: Head of Household, full-year resident

Dependent: Schae Heffernan, Daughter
400-00-6101

Form 2	Signature Paid Pre-parer Third-Party Designee	MT Add Sch	Tax Liability Sch
1	Primary Phone	1	1
8	PTIN	6	6
9	FEIN	16	Nonrefundable Credits Sch
11	Paid Preparer Phone	18	3
12	Paid preparer is also Third-Party Designee check box	MT Sub Sch	16
13	Another person other than paid preparer check box	1	Credit for Income Tax Paid to Another State
14	Name	7	1
15	Itemized Phone	9	2 State Abbrev
16	Sch I	35	3
17	1	38	4
18	2a	Itemized Deductions Sch	5
19	2b	1b	6
20	7	1c	7
21	10	4a	8
23a		4d	9
23b	MSA Sch	4	10
24	1	5b	
25	5	5c	
26	Withdrawals/ Penalties	5d	
	1	5	
	2	9 Payee	
	3	12	
	4	18 List Type	
	5	19	
	6		

Test 1: Form 2 (cont.)

Deduction: Itemized

Withholding: Wage

Direct Debit: RTN, Acct #

Other: Daytime phone number

Check-off contributions – Child Abuse Prevention \$10, Agriculture Literacy in Montana Schools \$20, MT Military Family Relief Fund (fill in amount)

Interest on underpayment of estimated taxes.

This return was filed past the return deadline.

Tax due: Direct debit

Signature, Paid Preparer and Third-Party Designee:

- Primary Taxpayer Phone Number
- PTIN
- FEIN
- Paid Preparer Phone
- Paid preparer is also Third-Party Designee check box
- Another person other than paid preparer check box
- Another Person Name
- Another Person Phone

Test 2: Form 2

Brad and Jack Gage are homeowners and file a joint resident Montana return. Jack is 66, has wages, pension from the Railroad Retirement Board, received Tier I benefits and an IRA distribution larger than the exclusion amount. Brad received IRA distribution that is smaller than the exclusion amount. Both received social security, and Brad received wages that he earned on his enrolled reservation. They also have capital gains. They received two innovation educational program credits. Jack has a student loan repayment for a health care professional that is included in his gross income. Also contributed to each of their medical savings' account. This is not a new account and had a beginning balance as well as earnings. Brad made estimated payments and had an overpayment carry forward from the previous year that was the result of the 2EC. Brad qualifies for the 2EC Elderly Homeowner/ Renter Credit.

Forms: Form 2; W2 (2); 1099-R; RRB 1099; RRB 1099-R; 1099-DIV; 1099-B; Schedule D, 2EC

Attachments: form ETM

Taxpayer: Brad Gage
SSN: 400-00-6002
DOB: 02/11/1961

Spouse: Jack Gage
SSN: 400-00-6012
DOB: 12/18/1957

Address: 511 3rd St S
Stanford, MT 59479

Filing Status: Joint, full year resident

Deduction: Standard

Withholding: Wage and pension

Check-off contributions – Nongame Wildlife Program (fill in amount), Child Abuse Prevention Program \$10, MT Military Family Relief Fund \$10.

Direct deposit:
RTN, Acct#
Savings Account

Signature, Paid Preparer and Third-Party Designee: N/A

Form 2	Refund Sch	Elderly Homeowner/Renters Credit Sch
1	1	1
4a	4	
4b	Direct	3
	Deposit	4
5a	Savings	5
5b	Routing No.	10
		11
6a	Account No.	12
6b	MSA Sch	13
7	1	14
9	2	15
11	3	18
13	4	19
14	5	20
15	MT Sub Sch	21
16	8	22
17	12a	
18	15	Other Payments and Refundable Credits Sch
19	33	1
20	34	2
21	35	7
22	38	11
24	Tax Liability Sch	
25	1	
27	6	
	Nonrefund-able Credits Sch	
	1	
	8	
	Credit confirmation code	
	16	

Test 3: Form 2

Christopher and Carla Turk filed a part year resident return as married filing separate on the same form. They are both over 65 and Carla is blind, and they have no dependents. Christopher died on 12/24/2023 and Carla receives alimony from her previous marriage that was finalized January 5th, 2018. They moved from Montana to Illinois June 30th, 2023. After they moved, they both had received interest which included US and Illinois bond interest. Pensions, IRA distributions and social security benefits were received throughout the year. Christopher received a small amount of Tier I railroad benefits. They both had capital gains. When they moved, they each closed a Montana family education savings account and have recapture tax. Carla made estimated payments and she had a credit carry forward from the previous year. The amounts used will need to be small enough so that the social security fields will be used on Form 2, Line 5a & 5b as well as the Partial Pension, Annuity, and IRA Exemption worksheet both columns.

Forms: Form 2, 1099-R (4); 1099-INT (2); SSA-1099 (2); Schedule E; Schedule D

Taxpayer: Christopher Turk
SSN: 400-00-6003
DOB: 08/23/1943

Spouse: Carla Turk
SSN: 400-00-6013
DOB: 06/18/1948

Address: 510 E Miner St
 Arlington Heights, IL 60004

Filing Status: Married filing separately on same form, part year resident.

Optional: Depending on amounts used, there may be additions or subtractions to taxable social security benefits.

Deduction: Standard

Withholding: N/A

Check-off contributions: Nongame Wildlife Program \$10 for each prime and spouse, Child Abuse Prevention Program \$5 for each prime and spouse, Agriculture Literacy in Montana Schools \$20 for prime and \$10 for spouse, MT Military Family Relief Fund \$20 for prime and (fill in amount) for spouse.

Tax due: Column A underpayment & Column B overpayment

Signature, Paid Preparer and Third-Party Designee: N/A

Form 2	2a Payment Sch	Nonresident/Part-Year Resident Tax
2a P/S	1	Date of Change
2b P/S	2	State from
4a P/S	3	State to
4b P/S	Signature, Paid Preparer, Third-Party Designee	7 P/S
5a P/S	Primary Phone	9 P/S
5b P/S	Spouse Phone	12 P/S - opt
6a P/S	Sch 1	15 P/S
6b P/S	1S	16 P/S
7 P/S	2a S	17 P/S
8 P/S	2b	18 P/S
9 P/S	8x P/S	Tax Liability Sch
11 P/S	9 P/S	1 P/S
12 P/S	10 P/S	2 P/S
13 P/S	MT Add Sch	Code P/S
14 P/S	3 P/S	5 P/S
15 P/S	9 P/S	Nonrefundable Credits Sch
16 P/S	16 P/S	2 P/S
17 P/S	17 P/S - Opt	16 P/S
18 P/S	18 P/S	Other Payments and Refundable Credits Sch
19 P/S	MT Sub Sch	1 S
20 P/S - opt	1 S	2 S
21 P/S	2 P/S	11 S
22 S	3 P/S	
24 P/S	22 P/S	
25 P/S	34 P/S	
26 P	35 P/S	
27 S	38 P/S	

Test 4: Form 2

Tim A. and Jill R. Taylor are residents of Michigan and are filing a Montana nonresident joint return. They have 3 dependent children. Tim is a service member under USC Title 10 orders and stationed at the air force base in Great Falls, Montana. Jill works at a high school in Great Falls and has educator expense and she received loan assistance through the Quality Educator Loan Assistance Program. Tim has a small business in Great Falls and is taking the trades education and training credit. Non-refundable credit will not exceed the total tax liability.

Forms: Form 2, W2 (2), Schedule C, Form TETC

Taxpayer: Tim A. Taylor
SSN: 400-00-6004
DOB: 05/01/1982

Spouse: Jill R. Taylor
SSN: 400-00-6014
DOB: 5/22/1983

Address: 1107 Montana Ave
 Laurel, MT 59044

Filing Status: Joint, non-resident

Dependent: Mark Taylor Son 400-00-6104
 Randy Taylor Son 400-00-6105
 Bradley Taylor Son 400-00-6106

Deduction: Standard

Withholding: Wage

Check-off contributions: Nongame Wildlife Program \$10, Child Abuse Prevention \$10, Ag Literacy in MT Schools \$5, MT Military Family Relief Fund \$20.

Overpayment: Check

Signature, Paid Preparer and Third-Party Designee: N/A

Form 2	Schedule I
1 P	3 P
8 P	10 P
9 P	11 P
10 P	15 P
11 P	25 P
13 P	Montana Subtractions Sch
14 P	12b P
15 P	13 P
16 P	35 P
17 P	38 P
18 P	Nonresident/Part-Year Resident Tax
19 P	6P
20 P	16 P
21 P	17 P
24 P	18 P
25 P	Tax Liability Sch
27 P	1 P
Refund Sch	3a P
1 P	Nonrefundable Credits Sch
4 P	7 P
	16 P

Test 5: Form 2

Richard Solomon is a non-resident of Montana, but a U.S. citizen that files separately from his wife, married filing separately on separate forms, as a fiscal year filer. They currently live in Australia and have for the last 2 years. He has two dependent children. Richard is self-employed. Richard contributes to a SEP and has a federal self-employed health insurance deduction. He has other gains from Schedule 4797 and Schedule E partnership income. He received Montana additions to income through a partnership which withholds tax on his behalf. He also has a capital loss carryover of \$1,500. The income from the Montana partnership is his only Montana-sourced income. He also received a small amount of money while serving on a jury and has qualified for the foreign income exclusion.

Forms: Form 2, Schedule C, Schedule D, Schedule E, K-1; Form 4797, Form 2555

Taxpayer: Richard Solomon
SSN: 400-00-6005
DOB: 02/11/1978

Spouse: Mary Albright
SSN: 400-00-6015

Address: 9/16 Mount Carmel Pl
 Engadine NSW, Australia 2233

Filing Status: Married filing separately on separate forms, Non-resident

Filing period: March to February

Dependent: Tommy Solomon Son 400-00-6107
 Sally Solomon Daughter 400-00-6108

Deduction: Standard

Withholding: Pass-through

Overpayment: Applied to estimates

Signature, Paid Preparer and Third-Party Designee: N/A

Form 2	Sch I
7	3
8	4
9	5
10	10
11	15
12	16
14	17
15	23
16	25
17	Montana Additions Sch
18	12
20	16
22	18
25	Nonresident/Part-Year Resident Tax
27	10
Refund Sch	16
1	17
2	18
	Tax Liability Sch
	1
	3a
	Other Payments and Refundable Credits Sch
	3
	9
	11

Test 6: Form 2

Roz and Daphne Doyle-Moon are full-year residents who file married filing separate on the same form. They have 1 child, who qualifies for the disabled child exemption. They finalized adoption for their daughter in June of 2023. Roz is 62 years old and qualifies for the elderly homeowner/renter credit. Roz receives an IRA distribution, \$1,500 which is taxable. Daphne earned \$2,000 in wages. They claimed the standard deduction on their Federal 1040. They both have made a deposit to an ABL account. Daphne is taking a nonrefundable credit for the student scholarship organization credit. Both received interest from a municipal bond as well as other shared interest. Both received social security but \$3,000 went directly to Roz’s nursing home. Last year they received a small Elderly Homeowner/Renter credit. They have a small loss on Roz’s business. Roz and Daphne both have a refund and are applying part of their refunds to their personal 529 and 529A plans. Roz would like part of her refund applied to her 529 and Daphne to her 529A. Daphne wants the remainder of her refund to be split and applied as a credit carry forward to 2024.

Forms: Form 2, W2 (1), 1099-R (1), Schedule D, Elderly Homeowner/Renter Credit 2EC, Form ADPT

Taxpayer: Roz Doyle-Moon
SSN: 400-00-6006
DOB: 03/30/1961

Spouse: Daphne Doyle-Moon
SSN: 400-00-6016
DOB: 04/13/1967

Filing Status: Married, filing separately on same form, full-year resident

Dependent: Eedie Doyle-Moon Daughter 400-00-6109

Mailing address: P.O. Box 1568
 Shelby, MT 59474

2EC physical address: 656 Oilfield Ave
 Shelby, MT 59474

Deduction: Standard

Withholding: Wage and pension

Check-off contributions: Nongame Wildlife Program \$10 for prime and \$5 for spouse, Child Abuse Prevention (fill in amount) for spouse, Agriculture Literacy in Montana Schools \$20 for prime and \$10 for spouse & MT Military Family Relief Fund for (fill in amount) for spouse.

Overpayment: Check

Signature, Paid Preparer and Third-Party Designee:

Taxpayer Daytime Phone Number
 Third-Party Designee Check Box
 Third-Party Designee name
 Third-Party Designee phone number

Form 2	Refund Sch	MT Subtractions Sch	Elderly Homeowner/Renters Credit Schedule
1 P/S	1 P/S	18 P/S	1
2a P/S	2 S	34 P	2
2b P/S	3 P/S	35 P/S	3
4a P	4 P/S	38 P/S	5
4b P	MT-529 Sch	Tax Liability Sch	6
6a P/S	1	1S	7
6b P/S opt	Routing #	6S	8
7P S - opt	Account #	Nonrefundable Credits Sch	9
8	Amount 1	9 S	10
9 P/S	2	CCC - S	11
11 P/S	Routing #	16 P/S	12
13 P/S	Account #	Physical Address of Montana Residence	13
14 P/S	Amount 2	Different physical add of MT residence than reported on Form 2	14
15 P/S	3	Physical Address and City	16
16 P/S	Signature Paid Preparer Third-Party Designee		17
17 P/S	Other Person check box		18
18 P opt/S	Name		19
19 P opt/S	Phone		20
20 P/S opt	Sch 1		21
21 P/S	3		22
22 P/S	10		Other Payments and Refundable Credits Schedule
24 P/S			7
25 P/S			8 P/S
27 P/S			11 P/S

Test 7: Form 2

Seeley Booth is a resident of North Dakota. He files a nonresident Montana return married filing separate and spouse is not filing. He has no dependents. He has wage income & withholding from Montana.

Forms: Form 2, W2(1)

Taxpayer: Seeley Booth
SSN: 400-00-6007
DOB: 6/28/1981

Spouse: 400-00-6017

Address: 603 West St
Golva, ND 58632

Form 2
11
21
25
27
Refund Sch
1
4

Filing Status: Married filing separate and spouse is not filing, Non-Resident.

North Dakota reciprocal box is marked.

Withholding: Wage

Overpayment: Check

Signature, Paid Preparer and Third-Party Designee: N/A

Test 8: Form 2

Chandler and Monica Bing are full-year residents who are filing married filing separate on the same form. Chandler is the primary filer, and he is 66. They have five children, one which qualifies for the disabled exemption. They both earn a wage income, qualified dividends, and a small subtraction from their Montana K-1s, losses on schedules C, D, E and F as well as a loss on Form 4797 which is reported as other gains or losses. Schedule E income includes pass-through income and withholding for Monica, Chandler paid pass-through entity taxes. They both received a state refund that is taxable on the federal return. The Bing's have dividends from joint accounts. They both received a lump-sum distribution. Monica received unemployment benefits. Both made contributions to their medical care savings accounts and Family Education Savings Plan throughout the year, but Monica has made nonqualified as well as qualified withdrawals from her account. They also had qualified expenditures and qualified compensation for productions that were filmed in Bozeman from December 31st, 2022 to March 5th, 2023.

Forms: Form 2, W-2(2); 1099-INT; 1099-G, Schedule C; Schedule D; Schedule E; Schedule F; Form 4797; Form 4972; K-1(2); Form 2106.

Taxpayer: Chandler Bing 400-00-6008 DOB: 1/22/1957

Spouse: Monica Bing 400-00-6018 DOB: 6/17/1965

Address: 219 1st St W
Roundup, MT 59072

Filing Status: Married, filing separately on same form, full-year resident

Dependent: Rodney Bing – Son 400-00-6110
Rachelle Bing - Daughter 400-00-6111
Randall Bing - Son 400-00-6112
Roger Bing - Son 400-00-6113
Russell Bing – Son - Disabled 400-00-6114

Deduction: Itemized

Withholding: Wage, K-1

Direct Deposit
RTN, Acct #
Checking Account
IAT = YES

Check-off contributions: Monica contributed \$10 to Nongame Wildlife Program, \$20 to Child Abuse Prevention, (fill in amount) to Ag Literacy in MT Schools and (fill in amount) to MT Military Relief Fund.

Signature, Paid Preparer and Third-Party Designee: N/A

Form 2	Sch I	Itemized Deduction Sch
1 P/S	1 P/S	1a P/S
3a P/S	3 P/S	1b P/S
3b P/S	4 P/S	1c P/S
7 P/S	5 P/S	1 P/S
8 P/S	6 P/S	2 s
9 P/S	7 S	4a P/S
10 S	10 P/S	4b P/S
11 P/S	12 S	4 P/S
12 S	25 S	5c P/S
13 P/S	MSA Sch	5d P
14 P/S	1 p/S	5 P/S
15 P/S Itemize	2 p/S	9 P/S Payee
16 P/S	3 p/S	16 P/S
17 P/S	4 p/S	19 P/S
18 P/S	5 p/S	Tax Liability Sch
19 P/S		1 P/S
20 P/S	1 S	4 P/S
21 P/S	2 S	6 P/S
22 P/S	3 S	Nonrefundable Credits Sch
24 S	4 S	13 P/S
25 P/S	5 S	UCRN P/S
26 S	6 S	16 P/S
27 P	Montana Add Sch	Other Payments and Refundable Credits Sch
Status 2a Payment Sch	6 S	3 S
1	16 S	4 P
2	18 S	11 P/S
4	Montana Sub Sch	
Refund Sch	1 P/S	
1	7 S	
4	15 P/S	
Direct Deposit	17 P/S	
Checking	31 P/S	
Routing No.	35 P/S	
Acct. no.	38 P/S	
Outside USA		

Test 9: Form 2

Philip and Vivian Banks moved to Montana from Vermont. They are filing a part-year resident return and using married filing separate on the same form. They have no dependents, though Vivian has a son that qualifies for a federal tax credit but is taken as a deduction on another return, splitting. Vivian continued to earn wages in Vermont for about 4 months after they moved to Montana before she was able to get Montana based employment. Philip made an extension payment. Vivian filed for the Credit for taxes paid to another state schedule for her Vermont wage. Philip quit his Vermont based teaching job right before moving to Montana. They are both claiming a media credit. They both pay alimony to former spouses, Philip’s most recent divorce was finalized August 25th, 2020.

Forms: Form 2, W2 (4), Form 8917.

Taxpayer: Philip Banks
SSN: 400-00-6009
DOB: 9/1/1958

Spouse: Vivian Banks
SSN: 400-00-6019
DOB: 4/25/1957

Address: 309 Adams Park Loop
 Corvallis, MT 59828

Filing Status: Married, filing separately on same form; Part-Year Resident.

Other: 1040 federal tax credit, but not a dependent exemption – Carlton Banks – Son 400-00-6115.

Deduction: Standard

Withholding: Wage

Overpayment: Check

Check-off contributions: Philip Contributed \$5 to Nongame Wildlife Program, \$20 to Child Abuse Prevention, (fill in amount) to Agriculture Literacy in MT schools and \$20 to MT Military Family Relief.

Signature, Paid Preparer and Third-Party Designee: N/A

Form 2	Montana Additions Sch
1 P/S	9
8 P	16
9 P/S	18
10 P/S	Nonresident/ Part-Year Resident Tax
11 P/S	Date if Change
12 P	State from
14 P/S	State to
15 P/S	1 P/S
	6 P
16 P/S	16 P/S
17 P/S	17 P/S
18 S	18 P/S
19 S	Tax Liability Sch
20 P-Opt/S	1 S
21 P/S	5 S
22 P	Nonrefundable Credits Sch
23a	3 S
23b S	16 S
24 S	Credit for In- come Tax Paid to Another State
25 P/S	1 S
27 P/S	2 S State Ab- brev
Refund Sch	3 S
1 P/S	4 S
4 P/S	5 S
Sch 1	6 S
3 P	7 S
8p P	8 S
9 P	9 S
10 P	10 S
19a P/S	Other Payments and Refundable Credits Schedule
19b	9 P
19c	11 P
25 P/S	

Test 10, Form 2

Kitty R. Forman is a full-year resident and files as head-of-household. She maintains a home for her disabled father who is also her dependent. Kitty received her mother’s farm, is a wage earner and is also a member of the Montana Air National Guard and received wages under Title 10 and Title 32. She travels 125 miles to perform her duties as a Guard member. Kitty received income from the farm creating an underpayment of estimated taxes but qualifies for the 2/3rd gross farming exception.

Forms: Form 2, W2 (2).

Taxpayer: Kitty R. Forman
SSN: 400-00-6010
DOB: 11/23/1975

Address: 1 Front St
 Alder, MT 59710

Filing Status: Head of Household; full-year resident.

Dependent: Burt Sigurdson Father 400-00-6116
 Laurie Forman Daughter 400-00-6117

Deduction: Standard

Withholding: Wage

Tax due

Signature, Paid Preparer and Third-Party Designee: N/A

Form 2
1
8
9
11
13
14
15
16
17
18
20
21
25
26
Sch 1
6
10
Montana Subtractions Sch
13
35
38
Tax Liability Schedule
1
6

Test 11, Form 2 – Amended

Maya Gallo is a full-year resident. Maya is a wage earner, has a business that has created an NOL, and she received a refund with her original return and had made a payment with her first amended return. She has a refund on this return.

****This is her 2nd amended return:*

Forms: Form 2, W2 (2), Form 2106, Form 8889.

Taxpayer: Maya Gallo
SSN: 400-00-6011
DOB: 10/31/1953

Address: 702 E Lamme St
 Bozeman, MT 59715

Filing Status: Single; full-year resident

Deduction: Standard

Withholding: Wage

Overpayment: Check

Signature, Paid Preparer and Third-Party Designee: N/A

Form 2	Amended Return Information
1	a
8	b
9	c
10	d
11	e
14	Box 1 All
15	Box 2 All
16	Box 3 All
17	Sch I
18 - Opt	3
20 - Opt	10
21	20
22	25
24	Tax Liability Sch
25	1 - Opt
27	6 - Opt
Refund Sch	Other Payments and Refundable Credits Sch
1	10
4	11
	Contributions, Penalties and Interest Sch
	2
	6

Form 2

Change Log

v1.1

- Test 1: Change divorce year to 2018
- Test 2: Line 12 - remove
- Test 3: Change divorce year to 2018
- Test 5: Other Payments & Refundable Credits Sch - Add Line 11
- Test 9: Include Montana Additions Schedule

v1.2

- Update SSNs to 00 in 4th and 5th positions