



## 2018 Virginia Tax Software Provider Registration Form Due October 1, 2018

Complete this form to request approval from the **Virginia Department of Taxation (Virginia Tax)** to provide tax preparation software for electronic and paper forms submission. By completing this form, you initiate the process to partner with Virginia Tax to support electronic and paper form filing. Completion of this form, the National Software Provider Standards Letter of Intent (LOI), and the Virginia Software Provider LOI means you agree to comply with all national security summit standards and requirements and state specific requirements identified in these documents. Access to the Virginia LOI form will only be provided once the registration portion and vetting is complete.

Email the completed form to: [Vendors@tax.virginia.gov](mailto:Vendors@tax.virginia.gov). If your submitted form is not complete, we will deny your request.

**Note:** Complete a registration form for each unique product your company offers.

Name of Company	Primary Product Name	State Software ID
DBA Name	NACTP Member Number	State Account Number (if applicable)
Address	Website Address/URL	Company FEIN
City	State	Zip Code
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
Primary Leads Feedback Contact *	Phone	Email Address
Test EFIN(s)	Test ETIN(s)	
Production EFIN(s)	Production ETIN(s)	

\* Must match the FTA Master List

### Rebranded Software Products Section

**Software Companies:** Use this section only if this product is rebranded with the approval of the Software Publisher, who is the original creator of the software and signer of the LOI. It is the position of the STAR Working Group under the auspices of the IRS Security Summit that:

- *Rebranding where the software publisher makes all code changes to generate the rebranded software and ensures that the rebranded software meets the applicable requirements (Trusted Customer, Generation of Authentication Elements, Generate of LEADS reports, STAR Requirements, etc.) does not pose any additional risk to the tax ecosystem.*
- *Rebranding where the organization who rebrands the software has the capability to make cosmetic changes including but not limited to color or font, but cannot make changes to the applicable requirements (listed above) also does not pose additional risk to the ecosystem.*

\* If more than 5 software products have been rebranded under a different name, list and attach them to your Registration.

\*\* Please provide the Unique Identifier if available.

Rebranded Product Name	Contact Person	Phone	Email Address	Unique Identifier **
Rebranded Product Name	Contact Person	Phone	Email Address	Unique Identifier **
Rebranded Product Name	Contact Person	Phone	Email Address	Unique Identifier **
Rebranded Product Name	Contact Person	Phone	Email Address	Unique Identifier **
Rebranded Product Name	Contact Person	Phone	Email Address	Unique Identifier **

**For Rebranded Products, Virginia Tax will evaluate on a case-by-case basis as to the extent of testing required with the e-File ATS / paper form approval process for these products.**

### Substitute Forms Section

**NOTE:** Virginia Tax **requires** software companies to support **print versions** of any return or schedule that is **supported within e-File**.

\* If you have separate contacts for each tax type, attach a separate contact list with this Registration.

State Substitute Form Vendor 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
Primary Fiduciary (Estate/Trust) Forms Contact *	Phone	Email Address
Secondary Fiduciary (Estate/Trust) Forms Contact *	Phone	Email Address

## Software Product Details Section

The five questions on this page must be answered or Virginia Tax will consider your Registration to be incomplete. This will delay overall processing and delay potential access to Virginia software development documents.

### 1.) Type of Software Product(s)

DIY/Consumer (Web-Based)

DIY/Consumer (Desktop)

Professional/Paid Preparer (Web-Based)

Professional/Paid Preparer (Desktop)

### 2.) Calculation Engine(s) Supported

One software product with one calculation engine.

All software products use separate calculation engines.

These software products share the same calculation engine: \_\_\_\_\_

### 3.) Does your software support unlinked state returns? (e-File Software Only)

Yes

No

### 4.) Virginia Tax Types Supported (Check all that apply)

Print    e-File

Individual Income Tax

2D Barcodes supported?      Yes

No      

Fiduciary / Estate / Trust Tax

Corporate / Franchise Tax

Pass-Through Partnership / S-Corp

Insurance Premium Tax

Sales and Use Tax

Miscellaneous Tax

Withholding Tax

*NOTE --- Beginning with TY 2019, Virginia Tax will request that printed 760CG Individual Income tax returns support 2D Barcodes.*

### 5.) Method Used to Provide Paper Forms to Users

Product produces own software generated forms

Product re-uses Fillable PDFs from the Virginia Tax website (i.e. Web Forms)

Other Method: \_\_\_\_\_

## Forms and Schedules Supported Section

Place a checkmark in the box next to each form to indicate that your software product supports the Virginia return/schedule/feature within your software. The forms listed are forms that Virginia Tax requires to be submitted for review and approval.

Virginia Tax **requires** software companies to support **print versions** of any return or schedule that is **supported within e-File**.

If the software product only supports a basic version of tax return and does not support the more complex schedules, place an **"N/S"** in the e-File column to indicate the schedule is **"Not Supported"** within the product.

### INDIVIDUAL INCOME TAX

VA Forms & Schedules	Virginia Description	e-File	Print
760(CG)	Individual Resident Tax Return – Substitute Form		
Schedule INC/CG	Substitute Form for Reporting Withholding		
760C	Underpayment of Estimated Tax by Individuals, Estates, and Trusts		
760ADJ	Schedule ADJ		
760F	Underpayment of Estimated Tax by Farmers and Fisherman		
760PY	Part-Year Resident Income Tax Returns		
760PY ADJ	Schedule 760PY ADJ		
760PY Sch. of Income	Schedule of Income		
763	Non Resident Income Tax Return		
763ADJ	Schedule 763 ADJ		
763-S	Special Nonresident Claim For Individual Income Tax Withheld		
765	Unified Nonresident Individual Income Tax Return		
Schedule CR	Credit Computation Schedule		
Schedule FED	Schedule of Federal Information		
Schedule L	Schedule for List of Participants (per 765)		
Schedule OSC	Schedule OSC – Credit Paid to Another State		
Schedule VAC	Schedule of Contributions – 529 Savings Plans AND Contributions		
Schedule VACS	Supplemental Contributions Schedule for the Virginia 529 Savings Plans		
760ES	Individual Income Estimated Income Tax Payment Voucher		
760IP	Individual Automatic Extension Payment Coupon		
760-PMT	Individual Return Payment Coupon <i>(For Printing only)</i>		
760-PFF	Individual Return Payment Coupon – Farmer/Fisherman/Merchant Seamen <i>(For Printing only)</i>		
CU-7	Consumer's Use Tax Return For Individuals		

### INDIVIDUAL INCOME TAX – CHECKBOXES & FEATURES

<i>Binary / PDF Attachments Supported</i>		
<i>1099-G Retrieval Indicator</i>		
<i>Address Change Indicator</i>		
<i>Amended Return</i>		
<i>Authorization to Discuss with Preparers</i>		
<i>Deceased Return</i>		
<i>Dependent on Another's Return</i>		
<i>Form 1310</i>		
<i>Head of Household</i>		
<i>Name or Filing Status Change</i>		
<i>NOL</i>		
<i>Overseas When Due</i>		
<i>Paid Preparer's / Preparer's Information</i>		
<i>Payment by Bank Debit</i>		
<i>Payment by Credit / Debit Card (Official Payments option)</i>		
<i>Qualifying Farmer / Fisherman / Merchant Seaman</i>		

### WAGE STATEMENTS

Forms	Description	e-File	Print	Forms	Description	e-File	Print
W-2	Wage & Tax Statement			1099-G	Certain Government Payments		
W-2G	Certain Gambling Winnings			1099-INT	Interest Income		
1099-B	Income from Broker / Barter Exchange			1099MISC	Miscellaneous Income		
1099-DIV	Dividends & Distributions			1099-OID	Original Issue Discount		
1099-K	Payment Card & 3 <sup>rd</sup> Party Network Transactions			1099-R	Income from Retirement / Pensions / Annuities , etc.		
VK-1	(VA Form) Owner's Share of Income & Virginia Modifications & Credits						

**FIDUCIARY INCOME TAX**

VA Forms & Schedules	Virginia Description	e-File	Print
770	Estates, Trusts & Unified Nonresidents Tax Return		
770ES	Estimated Fiduciary Tax Payment Voucher (770)		
770IP	Automatic Extension Payment Voucher (770 & 765)		
770-PMT	Return Payment Coupon (770) <i>(For Printing only)</i>		

**FIDUCIARY INCOME TAX – CHECKBOXES & FEATURES**

<i>Binary / PDF Attachments Supported</i>		
<i>Amended Return</i>		
<i>Charitable Remainder Trust</i>		
<i>Grantor Trust</i>		

**CORPORATION INCOME TAX**

VA Forms & Schedules	Virginia Description	e-File	Print
500	Corporation Income Tax		
500A	Corporation Allocation and Apportionment of Income Schedule		
500AB	Schedule of Related Entity Backs and Exceptions		
500AC	Schedule of Affiliated Corporations Consolidated and Combined Filers		
500ADJ	Schedule of Adjustments		
500AP	Modified Apportionment Schedule (VEDP Companies)		
500C	Underpayment of Estimated Tax by Corporations		
500CP	Corporation Automatic Extension Payment Coupon		
500CR	Credit Computation Schedule		
500EC	Electric Cooperative Modified Net Income Tax Return		
500EL	Electric Suppliers Corporation Minimum Tax and Credit Schedule		
500ES	Corporation Estimated Income Tax Payment Voucher		
500FED	Schedule of Federal Line Items		
500HS	Home Service Contract Provider Tax Computation Schedule		
500MT	Electric Cooperatives Minimum Tax and Credit Schedule		
500NOLD	Corporation Application for Refund-Carryback of NOL		
500T	Telecommunications Companies Minimum Tax and Credit Schedule		
500V	Corporate Income Tax Payment Coupon		

**CORPORATION INCOME TAX – CHECKBOXES & FEATURES**

<i>Binary / PDF Attachments Supported</i>		
<i>Amended Return</i>		
<i>Certified Company Apportionment</i>		
<i>Combined Return</i>		
<i>Consolidated Return</i>		
<i>Home Service Contract Provider Tax Liability Computation</i>		

**PARTNERSHIP INCOME TAX**

VA Forms & Schedules	Virginia Description	e-File	Print
502	Pass-Through Entity Return of Income and Return of Nonresident Withholding Tax		
502A	Multistate Pass-Through Entity Allocation and Apportionment of Income		
502ADJ	Schedule of Adjustments		
502V	Pass-Through Entity Tax Payment Voucher		
502 VK-1	Owner's Share of Income and Virginia Modifications and Credits		
502W	Pass-Through Entity Withholding Tax Payment Voucher		

**PARTNERSHIP INCOME TAX – CHECKBOXES & FEATURES**

<i>Binary / PDF Attachments Supported</i>		
<i>Amended Return</i>		
<i>Certified Company Apportionment (with 500AP)</i>		
<i>Home Service Contract Provider Tax Liability Computation (with 500HS)</i>		

**WITHHOLDING TAX**

VA Forms & Schedules	Virginia Description	e-File	Print
VA-5 Monthly	Monthly Withholding Tax Return		
VA-5 Quarterly	Quarterly Withholding Tax Return		
VA-6	Annual / Final Withholding Tax Reconciliation		
VA-6H	Household Annual Withholding Tax Reconciliation		
VA-15	Semi-Weekly Withholding Tax Payment		
VA-16	Quarterly Withholding Reconciliation of VA-15 Payments		

INSURANCE PREMIUMS LICENSE TAX			
VA Forms & Schedules	Virginia Description	e-File	Print
800	Insurance Premiums License Tax Return		
Schedule 800ADJ	Insurance Premiums License Tax Schedule of Adjustments		
Schedule 800B	Guaranty Fund Assessment Credit Worksheet		
Schedule 800CR	Insurance Premiums License Tax Credit Schedule		
Schedule 800RET	Retaliatory Tax Report		
Schedule 844	Statement of Exemption		
800C	Underpayment of Estimated Insurance Premiums License Tax		
800V	Insurance Premiums License Tax Payment Voucher		
800IES (R-1A)	Insurance Premiums License Tax Declaration Insurance Premiums Estimated Payment Voucher		
800ES	Insurance Premiums License Tax Estimated Payment Vouchers		
801	Insurance Premiums License Tax Estimated Payment Vouchers		
802	Surplus Lines Brokers Annual Reconciliation Tax Return		
802V	Surplus Lines Brokers – Annual Reconciliation Tax Payment Voucher		

SALES AND USE TAX			
VA Forms & Schedules	Virginia Description	e-File	Print
AST-2	Dealer's Aircraft Sales and Use Tax Return		
AST-3	Aircraft Sales and Use Tax Return		
DM-1	Digital Media Fee Tax Return		
MVR-420	Motor Vehicle Rental Tax Return		
MVR-420B	Virginia Schedule of Local Motor Vehicle Rental Taxes		
MVR-420V	Vehicle Rental Tax Voucher		
ST-APC	Accelerated Sales and Use Tax Payment Voucher		
ST-6	Direct Pay Permit Sales Tax Return		
ST-6B	Schedule of Local Sales and Use Taxes (ST-6 & ST-7)		
ST-6R	Schedule of Regional State Sales and Use Tax (ST-6 & ST-7)		
ST-6V	Direct Pay Permit Sales Tax Payment Voucher		
ST-7	Business Consumer's Use Tax Return		
ST-7V	Business Consumer's Use Tax Payment Voucher		
ST-8	Out-of-State Dealer's Use Tax Return		
ST-8B	Schedule of Local Sales and Use Taxes		
ST-8R	Schedule of Regional State Sales and Use Tax		
ST-8V	Out-of-State Dealer's Use Tax Payment Voucher		
ST-9	Retail Sales and Use Tax Return		
ST-9B	Schedule of Local Sales and Use Taxes		
ST-9R	Schedule of Regional State Sales and Use Tax		
ST-9V	Retail Sales and Use Tax Payment Voucher		
T-1	Tire Recycling Fee Tax Return		
VM-2	Vending Machine Dealer's Sales Tax Return		
VM-2B	Schedule of Vending Machine Sales by Locality		
VM-2V	Vending Machine Dealer's Sales Tax Voucher		
WCT-2	Dealer's Monthly Return of Watercraft Sales and Use Tax		

MISCELLANEOUS			
VA Forms & Schedules	Virginia Description	e-File	Print
404	Soft Drink Excise Tax Return		
1034	Forest Products Tax Return		
1035	Forest Product Tax Return – Small Manufacturers		
CA-1	Cattle Assessment Tax Return		
CO-1	Corn Assessment Tax Return		
CT-75	Communication Taxes Return		
CT-75B	Cable Franchise Fee Schedule		
CT-75V	Communication Taxes Voucher		
CX-1	Cotton Assessment Tax Return		
EG-1	Egg Excise Tax Return		
Form 200	Litter Tax Return		
PN-1	Peanut Excise Tax Return		
SG-1	Small Grains Assessment Tax Return		
SH-1	Sheep Assessment Tax Return		
TT-8	Tobacco Products Tax Return		
TT-8V	Tobacco Products Tax Voucher		

**Vendor Software Limitations for e-File Products Section**

Specify any other software limitations related to the Virginia Forms and Schedules that exist beyond the Forms and Schedules Supported section (Pages 4 – 7).

If the software does not support all checkboxes, additions, subtractions, deductions, credits, contributions, etc. – list what is not supported for a particular form / schedule / feature.

#	Form / Schedule / Feature / Checkbox	Description of Limitation for e-File Product
1		
2		
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12		