



## Forms Approval Instructions

Each new software vendor wishing to create substitute Maryland income tax forms must provide their company name, address, contact person, voice and fax numbers, and e-mail address. Upon receipt the company will be issued a vendor ID number which must be visible at the bottom of all forms produced. The bottom left corner is preferred. The number is composed of the two-digit tax year, hyphen and two-digit vendor number (i.e. 07-25). Vendors that have previously registered should not re-submit.

Please read **Administrative Release 26 – Procedures for Computer-Printed Substitute Forms** for more comprehensive information, before submitting forms for approval. Administrative Release 26, 2D barcode specifications, draft forms and final version forms are all available on our Web site. Go to [www.marylandtaxes.com](http://www.marylandtaxes.com), select Tax Professionals on the title bar at the top, and then click on the Software Developers bulleted link located at the bottom of the Tax Professionals home page. To obtain specifications and sample forms with scan lines, such as sales and use and employer withholding vouchers, contact the substitute forms coordinator.

All bar-coded and scan line forms must be submitted for review and approval annually. After the forms have been reviewed and found to visually meet our processing criteria, they will go through our forms training process and a template will be created that will ensure correct processing of each particular form. For this reason we require **two sets of four different test scenarios and two blank forms** for each form submitted for approval. If you are supporting 2D barcodes, the test samples must have the test data included in the 2D barcode **exactly** as it appears on the form. If any problems should arise during the review and training process, additional forms may be requested for further review and testing. Hard copies of these forms are required for approval.

You may make up your own test scenarios. All taxpayer identification fields and each field preceded or followed by a pointer or bullet on the tax form must include test data in at least one of the four test samples. In addition, please use the following names, addresses, Social Security and federal employer identification numbers as we have blocked these to prevent accidental processing of the forms.

Personal returns should use John S Doe for primary and Jane A Doe for secondary names.  
Fiduciary and business returns can use any name of your choice.  
The address for all returns must be: 110 CARROLL ST, ANNAPOLIS, MD 21411

SSN 654321000 - Primary                      FEIN 601248739  
SSN 654321001 - Secondary                  FEIN 523019687

Instructions for generating 1D and 2D barcodes are found in Administrative Release 26.

**Important: for those vendors supporting 2D barcodes, the default must be set to generate the 2D barcode.**

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To ensure customers using your software do not experience any delays in processing, please use the following guidelines:

- ◆ The same forms that are being released with your software must match exactly the approved forms.
- ◆ Include the name and Social Security number/FEIN at the top of page 2 on any multiple page form.
- ◆ Leave blank any field that is blank or zero. Do not enter zero “0”, “N/A” or “NONE” in a numeric field.
- ◆ Draft and/or final forms on our Web site may show 049 in the first box of the code number area. Do not include this code on your forms.
- ◆ Your vendor number must be displayed on all pages generated.
- ◆ All alphabetic characters must be in upper case.

Please avoid the following:

- ◆ Slashes, parentheses, brackets, commas, periods or apostrophes in data fields.
- ◆ Entering names and addresses outside of the fields designated for them.
- ◆ Entering alpha characters in numeric fields.
- ◆ Use of foreign characters.
- ◆ Entering middle initial and last name together instead of placing them in the fields provided.
- ◆ Printing returns without the required barcode.
- ◆ Data touching or printing outside of the surrounding boxes.

All forms requesting approval must be submitted by December 15. Forms should be mailed to the following address when using a delivery service that requires a physical address:

Lewis Koenig  
Revenue Administration Division  
110 Carroll St.  
Annapolis, MD 21411

When using the U.S. Postal Service, mail to:

Lewis Koenig  
Revenue Administration Division  
PO Box 1829  
Annapolis, MD 21404-1829

Forms that do not contain barcodes or scan lines are not required to be submitted for approval. If approval is requested, only one blank form is required. Electronic versions of these forms are acceptable for approval.

For any questions concerning substitute forms, please call Lewis Koenig, Substitute Forms Coordinator, at 410-260-7442 or e-mail at [lkoenig@comp.state.md.us](mailto:lkoenig@comp.state.md.us)

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