

**Who needs to complete this registration form?**

This agreement must be completed by anyone developing substitute copies of official Iowa tax forms as stated in the Iowa Administrative Code 701-8.3, "Substitute forms." If more than one person is responsible for tax forms, each person must complete a registration form annually.

**Complete this registration form for tax year 2018.** To develop substitute forms and barcodes for prior years, send a request to [IDRSubForms@iowa.gov](mailto:IDRSubForms@iowa.gov). We will provide you with similar registration materials for prior years' forms.

**Your company agrees to:**

1. Register with the Department. Email your registration form to [IDRSubForms@iowa.gov](mailto:IDRSubForms@iowa.gov).
2. Request approval of substitute forms based on final published versions. Email forms to: [IDRSubForms@iowa.gov](mailto:IDRSubForms@iowa.gov). If sending zip files by e-mail, include a list of the forms in the email message.
3. Support 1D barcode technology for all forms as identified by the Department. Barcodes require the 4-digit NACTP vendor code.
4. Include a 3-digit alpha code that signifies your company on all Iowa forms.
5. Distribute only Department approved versions of official Iowa forms.
6. If the form contains a 1D barcode but is not listed on this registration, the Department must approve before use. Email form to [IDRSubForms@iowa.gov](mailto:IDRSubForms@iowa.gov).
7. Use as master copies only those official Iowa tax forms found on the Department's website.
8. Forms submitted for approval should be in PDF format.
9. Correct any errors when notified by the Department. Notify customers of corrections.
10. Allow the Department to include the name of your company in various public information materials designed to inform tax practitioners and the public about vendors who have agreed, complied, or failed to comply with the Department's policies, procedures, guidelines and specifications regarding substitute Iowa tax forms.

**Where can I find information on final versions of forms?**

It is your responsibility to recognize forms may change. Forms can be found on the public site or on the secured site. Only forms containing a barcode or forms listed on this registration require approval by the Department. **The recreated forms must match the Department's forms as closely as possible, including registration marks (black squares 0.25" x 0.25").**

The Department's website: <https://tax.iowa.gov>

**Questions?** Email [IDRSubForms@iowa.gov](mailto:IDRSubForms@iowa.gov)

Company Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, ZIP \_\_\_\_\_

Company Identification Codes      3-digit alpha \_\_\_\_\_      4-digit NACTP Code      \_\_\_\_\_

Contact Person \_\_\_\_\_      Phone \_\_\_\_\_

Email Address \_\_\_\_\_      Date \_\_\_\_\_

# **IOWA SUBSTITUTE FORMS CHECKLIST**

Vendor Code \_\_\_\_\_

\* All forms listed on this registration must contain a 1D barcode unless otherwise noted \*  
Check all forms for which you will be personally responsible.

## **FIDUCIARY TAX**

### **ALL FORMS BELOW**

- IA 1041 Iowa Fiduciary Return (63-001)
- IA 1041V Fiduciary Payment Voucher (63-007)

## **FORMS COMMON TO MULTIPLE TAXES**

### **ALL FORMS BELOW**

- IA 8801 Iowa Alternative Minimum Tax Credit (41-009)
- IA 4136 Iowa Fuel Tax Credit (41-036)
- IA 4562A/B Iowa Depreciation Adjustment Schedule (41-105)
- IA 128S Iowa Alternative Simplified Research Activities Credit (41-124)
- IA 128 Iowa Research Activities Tax Credit (41-128)
- IA 130 Iowa Out-of-State Tax Credit Schedule (41-130)
- IA 133 Iowa New Jobs Tax Credit (41-133)
- IA 134 Iowa S Corporation Appointment Credit (41-134)
- IA 140 Geothermal Tax Credit (41-169)
- IA 147 Iowa Franchise Tax Credit (41-147)
- IA 148 Iowa Tax Credits Schedule (41-148)
- IA 8864 Iowa Biodiesel Blended Fuel Tax Credit (41-149)
- IA 135 Iowa E85 Gasoline Promotion Tax Credit (41-150)
- IA 137 Iowa Ethanol Promotion Tax Credit (41-151)
- IA 138 Iowa E15 Plus Gasoline Promotion Tax Credit (41-152)
- IA 4506 Request for Copy of Tax Return (95-504)

## **FRANCHISE TAX - Financial Institutions**

### **ALL FORMS BELOW**

- IA 1120F Franchise Return for Financial Institutions (43-001)
- IA 1120F ES Franchise Estimated Tax Voucher (43-006)
- IA 1120F V Iowa Franchise Tax Payment Voucher (43-009)
- IA 4626 Alternative Minimum Tax (43-012): also used for Corporation tax
- IA 8827F Alternative Minimum Tax Credit (43-014)

## **INCOME TAX: CORPORATION**

### **ALL FORMS BELOW**

- IA 1120 Iowa Corporation Income Tax Return (42-001)
- IA 1120S Iowa Income Tax Return for S Corporations (42-004)
- IA 1120S Schedule K-1 (42-008)
- IA Corporation Schedule D Non Business Income (42-014)
- IA 8827 Alternative Minimum Tax Credit (42-015)
- IA 1120V Corporate Tax Payment Voucher (42-019)
- IA Corporation Schedules F and G (42-020)

# **IOWA SUBSTITUTE FORMS CHECKLIST**

Vendor Code \_\_\_\_\_

- IA Corporation Schedule H1, H2, H3 (42-021)
- IA Corporation Schedules I, J1 and J2 (42-022)
- IA 1120X Iowa Amended Corporation Income Tax Return (42-024)
- IA Corporation Schedule L Iowa Nexus Adjustment (42-025)
- IA 1139-CAP Application for Refund Due to Carryback of Capital Losses (42-028) - **no barcode**
- IA 1120ES Corporate Estimated Tax Payment Voucher (45-004)
- IA 2220 Underpayment of Estimated Tax by Corporations and Financial Institutions (45-006)

## **INCOME TAX: INDIVIDUAL**

### **ALL FORMS BELOW**

- Check this box if you are going to include 2D barcode on form IA 1040 (41-001)
  - IA 1040 Iowa Individual Income Tax Form (41-001) \*form contains 2D barcode\*
  - IA 1040 Schedule A, Iowa Itemized Deductions (41-004)
  - IA 1040C Composite Individual Income Tax Return for Nonresidents (41-006)
  - IA 1040 Schedule B, Interest and Dividend Income (41-029)
  - IA 1040XV Amended Payment Voucher (41-121)
  - IA 1040X Amended Individual Income Tax Return (41-122)
  - IA 123 Net Operating Loss (NOL) Schedule (41-123)
  - IA 126 Iowa Nonresident and Part-Year Resident Credit Schedule (41-126)
  - IA 2440 Disability Income Exclusion (41-127)
  - IA 6251 Iowa Alternative Minimum Tax Computation (41-131)
  - IA 6251B Balance Sheet/Statement of New Worth (41-135)
  - IA 1040V Iowa Individual Income Tax Payment Voucher (41-137)
  - IA 177 Iowa Adoption Tax Credit (41-154)
  - IA 100A Iowa Capital Gain Deduction – Cattle, Horses, or Breeding Livestock (41-155)
  - IA 100B Iowa Capital Gain Deduction – Real Property Used in a Farm Business (41-156)
  - IA 100C Iowa Capital Gain Deduction – Real Property Used in a Non-Farm Business (41-157)
  - IA 100D Iowa Capital Gain Deduction – Timber (41-158)
  - IA 100E Iowa Capital Gain Deduction – Business (41-159)
  - IA 100F Iowa Capital Gain Deduction – ESOP (41-160)
  - IA 1040ES Individual Income Estimate Tax Payment Voucher (45-002)
  - IA 2210 Underpayment of Estimated Tax by Individuals (45-007)
  - IA 2210F Underpayment of Estimated Tax by Farmers and Fishers (45-008)
  - IA 2210 AI Annualized Income Installment Method (45-011)
  - IA 2210S Short Method Underpayment of Estimated Tax by Individuals (45-012)

## **INCOME TAX: PARTNERSHIP**

- IA 1065 Iowa Partnership Return of Income (41-016)
- IA 1065 Schedule K-1 (41-018)

## **INHERITANCE TAX**

- IA 706 Iowa Inheritance Tax Return (60-008)

# **IOWA SUBSTITUTE FORMS CHECKLIST**

Vendor Code \_\_\_\_\_

## **PROPERTY TAX**

- Iowa Rent Reimbursement Claim (54-130)
- Statement of Rent Paid (54-132)
- Real Estate Transfer - Declaration of Value (57-006)

## **SALES/USE**

### **ALL FORMS BELOW**

- Iowa Consumer's Use Tax Worksheet (32-007)
- Iowa Sales/Retailer's Use Tax and Surcharge Return (32-022)
- Iowa Consumer's Use Tax Return (32-024)
- Iowa Streamlined Sales Tax Return (32-025)
- Sales/Use Tax Payment Voucher (32-026)
- Water Service Excise Tax Payment Voucher (32-096)

## **WITHHOLDING**

- Withholding Quarterly Tax Return (44-095)
- Withholding Tax Payment Voucher (44-105)

## **APPLICATIONS AND OTHER**

### **ALL FORMS BELOW**

- IA 2848 Power of Attorney (14-101)
- IA 8821 Release of Information (14-104)
- IA 2848-A Business Multiple Power of Attorney (14-106)
- First-Time Homebuyer Savings Account: Account Holder and Designated Beneficiary (41-162)
- First-Time Homebuyer Savings Account: Withdrawal Form (41-163)
- First-Time Homebuyer Savings Account: Annual Report (41-164)