



State of New Jersey

Division of Revenue and Enterprise Services E-File Letter of Intent

Tax Year 2022

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Director

This form must be completed and submitted to e-govservices@treas.nj.gov by 1/10/2023

2022 Tax Software Provider NJDORES Letter of Intent

Welcome to the Income Tax Letter of Intent (LOI). If your software company intends to submit electronic returns to the State of New Jersey Division of Revenue and Enterprise Services (NJDORES) you will need to complete this form and submit it to e-govservices@treas.nj.gov.

By submitting this Letter of Intent (LOI) to the NJDORES, you agree to meet our standards for software provider registration, tax preparation software, and substitute forms. If you do not meet the standards and requirements explained in this LOI or provide an incomplete form, we may deny your application or revoke your approved software provider status and reject all electronic returns submitted using your products.

You must complete a separate LOI for each unique product your company offers.

Note: If you are a new Software Provider who has not filed city/state income tax returns with any city or state agencies, you must have passed assurance testing with the IRS. Attach documentation from the IRS demonstrating you have successfully tested with the IRS.

Important dates

NJDORES has important key dates to ensure we are ready for the filing season and taxpayers can file an accurate and timely tax return. Please note the following key dates:

- Complete and submit this LOI by 1/10/2023.
- Assurance testing (ATS) begins on [date].
- We accept E-File tests all year, LOI must be complete before testing.

Amended Letter of Intent

Check this box if this is an amended Letter of Intent.

Reason for amendment:

Company information

List your company information.

Name of company	Product name	City/State issued software ID (if applicable)
DBA name	NACTP vendor ID	City/State tax account number (if applicable)
Address	Product address/URL	Company FEIN
City	State	Zip code
List your other product names using the same calculation engines here:		

IRS issued electronic identification numbers

List your IRS electronic identification numbers.

Test EFIN(s)	Test ETIN(s)
Production EFIN(s)	Production ETIN(s)

Contact information

List the contact information for each area identified.

Regulatory/compliance contact	Phone	Email address
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
Secondary leads reporting contact	Phone	Email address

Substitute forms registration

Complete this section only if your product will provide substitute forms.

Agency substitute forms software 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

Note: If you have separate contacts for each business tax type, please list them by tax type on a separate sheet and attach it to this submission.

Software products and tax types supported

Check all that apply.

Type of software product supported	
DIY/consumer (Web-Based)	<input type="checkbox"/>
DIY/consumer (Desktop)	<input type="checkbox"/>
Professional/paid preparer (Web-Based)	<input type="checkbox"/>
Professional/paid preparer (Desktop)	<input type="checkbox"/>

Tax types supported	
Individual income Tax	<input type="checkbox"/> E-file
Estate/trust/fiduciary Tax	<input type="checkbox"/> E-file
Partnership Tax	<input type="checkbox"/> E-file
Corporation Business Tax	<input type="checkbox"/> E-file
S-Corporation return	<input type="checkbox"/> E-file
Pass-Through Entity (PTE)	<input type="checkbox"/> E-file

Rebranded software products

Complete this section only if your product is rebranded.

For software to be considered rebranded, changes cannot be made to the software requirements and output(s). As the Software company selling and/or licensing your product to a third-party, it is your responsibility to make sure the rebranded product reflects the current software requirements and output(s). List each of your rebranded products below.

Use one of the following class codes for each product:

- **Class code 1:** Software products sold/licensed to a third-party user and the third-party user can add their own logos and/or splash screens, but they cannot modify calculations in the program.
- **Class code 2:** Software products sold/licensed to a third-party user and the third-party can modify calculations in the program.

Rebranded product name	Class code	ETIN (if applicable)	Contact person	Phone	Email address
Rebranded product name	Class code	ETIN (if applicable)	Contact person	Phone	Email address
Rebranded product name	Class code	ETIN (if applicable)	Contact person	Phone	Email address
Rebranded product name	Class code	ETIN (if applicable)	Contact person	Phone	Email address
Rebranded product name	Class code	ETIN (if applicable)	Contact person	Phone	Email address

Attach additional sheets if needed.

For Rebranded Products, NJDORES has the following requirements for e-file ATS approval.

- Rebranded Products with a class code 1 are required to complete an abbreviated e-file ATS approval process
- Rebranded Products with a class code 2 are required to complete a full e-file ATS approval process

E-file mandates or requirements

<https://www.state.nj.us/treasury/taxation/cbtefile.shtml>

<https://www.state.nj.us/treasury/taxation/efilemandate-faqs.shtml>

Forms and schedules supported by tax type (check all that apply)

Check the boxes of the forms and schedules your company supports

Forms and Schedules	E-file
Individual Income Tax	
NJ1040	<input type="checkbox"/>
NJ1040NR	<input type="checkbox"/>
NJ1040X	<input type="checkbox"/>
Schedule NJ – COJ	<input type="checkbox"/>
Schedule NJ – DOP	<input type="checkbox"/>
NJ2210	<input type="checkbox"/>
NJ2210NR	<input type="checkbox"/>
NJ2450	<input type="checkbox"/>
NJW2	<input type="checkbox"/>
NJ-NRA	<input type="checkbox"/>
Schedule BUS1	<input type="checkbox"/>
Schedule BUS2	<input type="checkbox"/>
Schedule BUS2 NR	<input type="checkbox"/>
Worksheet A	<input type="checkbox"/>
Worksheet B	<input type="checkbox"/>
Worksheet C	<input type="checkbox"/>
NJCBTK1	<input type="checkbox"/>
NJ1065 K1	<input type="checkbox"/>
NJ630	<input type="checkbox"/>
NJ1040ES	<input type="checkbox"/>
Schedule NJ WWC	<input type="checkbox"/>
Schedule NJ HCC	<input type="checkbox"/>
Forms and Schedules	E-file
Estate/Trust/Fiduciary Tax	
NJ1041	<input type="checkbox"/>
NJ1041SB	<input type="checkbox"/>

NJ2210	<input type="checkbox"/>
NJ-NRA	<input type="checkbox"/>
Schedule A	<input type="checkbox"/>
Schedule A – SB	<input type="checkbox"/>
Schedule B	<input type="checkbox"/>
Schedule B – SB	<input type="checkbox"/>
Schedule C	<input type="checkbox"/>
Schedule C – SB	<input type="checkbox"/>
Schedule D	<input type="checkbox"/>
Schedule E	<input type="checkbox"/>
Schedule E – SB	<input type="checkbox"/>
Schedule G	<input type="checkbox"/>
NJ1041ES	<input type="checkbox"/>
Schedule BUS1	<input type="checkbox"/>
Schedule BUS2	<input type="checkbox"/>
Worksheet B	<input type="checkbox"/>
Worksheet C	<input type="checkbox"/>
NJ630	<input type="checkbox"/>
NJ1040ES	<input type="checkbox"/>
Schedule NJ WWC	<input type="checkbox"/>
Schedule NJ HCC	<input type="checkbox"/>
Forms and Schedules	E-file
Corporate Business Tax	
CBT100	<input type="checkbox"/>
CBT100S	<input type="checkbox"/>
CBT100U	<input type="checkbox"/>
Members Schedule (CBT100U)	<input type="checkbox"/>
Schedule A	<input type="checkbox"/>
Schedule A-S	<input type="checkbox"/>
Schedule A-U	<input type="checkbox"/>
Schedule A-2	<input type="checkbox"/>
Schedule A-2-U	<input type="checkbox"/>
Schedule A-3	<input type="checkbox"/>
Schedule A-3-U	<input type="checkbox"/>
Schedule A-4	<input type="checkbox"/>
Schedule A-4-S	<input type="checkbox"/>
Schedule A-4-U	<input type="checkbox"/>
Schedule A-5-U	<input type="checkbox"/>
Schedule A-7-U	<input type="checkbox"/>
Schedule A-GR	<input type="checkbox"/>

Schedule CG-U	<input type="checkbox"/>
Schedule CBTK1	<input type="checkbox"/>
Schedule F	<input type="checkbox"/>
Schedule F-U	<input type="checkbox"/>
Schedule G	<input type="checkbox"/>
Schedule G-U	<input type="checkbox"/>
Schedule G-2	<input type="checkbox"/>
Schedule H	<input type="checkbox"/>
Schedule H-U	<input type="checkbox"/>
Schedule J	<input type="checkbox"/>
Schedule J-U	<input type="checkbox"/>
Schedule KL-S	<input type="checkbox"/>
Schedule K-S	<input type="checkbox"/>
Schedule L-U	<input type="checkbox"/>
Schedule N	<input type="checkbox"/>
Schedule O	<input type="checkbox"/>
Schedule P	<input type="checkbox"/>
Schedule P-1	<input type="checkbox"/>
Schedule P-1-U	<input type="checkbox"/>
Schedule PC	<input type="checkbox"/>
Schedule PC-U	<input type="checkbox"/>
Schedule PT	<input type="checkbox"/>
Schedule R	<input type="checkbox"/>
Schedule R-U	<input type="checkbox"/>
Schedule R-S	<input type="checkbox"/>
Schedule RT	<input type="checkbox"/>
Schedule S	<input type="checkbox"/>
Schedule S-U	<input type="checkbox"/>
Schedule X-U	<input type="checkbox"/>
Form 500	<input type="checkbox"/>
Form 500S	<input type="checkbox"/>
Form 500U	<input type="checkbox"/>
Form 500U-P	<input type="checkbox"/>
Form 500U-PA	<input type="checkbox"/>
Worksheet500P	<input type="checkbox"/>
CBT150	<input type="checkbox"/>
CBT200T	<input type="checkbox"/>
Annual Report	<input type="checkbox"/>
Forms and Schedules	E-file
Partnership Tax	

NJ1065	<input type="checkbox"/>
CBT1065	<input type="checkbox"/>
CBT160	<input type="checkbox"/>
PART 200T	<input type="checkbox"/>
NJ1065E	<input type="checkbox"/>
Schedule A	<input type="checkbox"/>
Schedule B	<input type="checkbox"/>
Schedule J	<input type="checkbox"/>
Schedule L	<input type="checkbox"/>
Schedule PD	<input type="checkbox"/>
Schedule T	<input type="checkbox"/>
NJ1065 K1	<input type="checkbox"/>
Schedule NJ-NRA	<input type="checkbox"/>
Worksheet GITEP	<input type="checkbox"/>
NJ1065ES	<input type="checkbox"/>
Forms and Schedules	E-file
Pass-Through Entity Tax	
PTE100	<input type="checkbox"/>
PTE150	<input type="checkbox"/>
PTE200T	<input type="checkbox"/>
Schedule PTEK1	<input type="checkbox"/>
Schedule MD	<input type="checkbox"/>
Schedule CMD	<input type="checkbox"/>

Electronic amended returns

NJDORES requests you support electronic amended returns for those available through MeF.

Software limitations

List any software limitations to forms or schedules you support.

Agency requirements

This section identifies agency requirements and expectations of new and existing Software Providers and the software product

Issue notification and resolution requirements

This section represents the NJDORES issue notification and issue resolution standards.

- If there is an issue with any of the above software packages, State of New Jersey Division of Revenue and Enterprise Services must be contacted about the issue. The issue must be corrected in a timely manner.

- If State of New Jersey Division of Revenue and Enterprise Services finds an issue with any of the above software, you will be contacted and the issue must be corrected in a timely manner.

Production return submission requirements

All returns generated from this software must be e-filed or printed from the approved software or a subsequent product update.

Product updates

Desktop product users who attempt to file 10 or more business days after a production release must be required to download and apply the product update.

Schemas

Your software must follow the schema requirements. Find NJDORES schema requirements

- State of New Jersey Web Portal
 - <https://my.state.nj.us/openam/UI/Login>

System security requirements

NJDORES does not prescribe the security requirements for your system. You are responsible for implementing appropriate security measures to protect taxpayers and their information in your system. You must apply security measures to protect taxpayer information in your system when it is on-line, off-line, at rest, and in transit.

Testing and submissions

All e-file ATS tests submitted during the approval process must be created in, and originate from, the actual software.

Validation of data elements

You must validate the following pre-populated data elements:

Customer Notices

This section identifies information NJDORES is requiring the software providers to communicate with customers.

Disclosure and use of information language expectations

You must include the following consent language with electronic filing software.

For Do-It-Yourself software:

By using a computer system and software to prepare and file my tax return(s) electronically, I consent to the transmission of my return(s) and to the disclosure of all information about my use of the system and software to New Jersey Division of Revenue and Enterprise Services.

For Tax Professional software:

By using a computer system and software to prepare and file my client's return(s), I consent to the transmission of my client's return(s) and to the disclosure of all information about my use of the system and software to the New Jersey Division of Revenue and Enterprise Services.

For Business software:

By using a computer system and software to prepare and file this business tax return(s), I consent to the transmission of the return(s) and to the disclosure of all information about the use of the system and software to the New Jersey Division of Revenue and Enterprise Services.

Driver's license/ID card expectations for individual income tax

NJDORES is providing the following expectations and information:

For e-file returns:

NJDORES requires the DL/ID card be included with the return but won't reject the return if it's not included.

Refund expectations

NJDORES is providing a URL for refund processing. All Do It Yourself (DIY) and Tax Professional software packages must include this information in your software. The message is expected to be displayed within the software in a way to maximize the likelihood the message is read.

URL: https://www20.state.nj.us/TYTR_TGI_INQ/jsp/prompt.jsp

Taxes due expectations

NJDORES is providing a URL about taxes due, such as due dates and payment methods. All Do It Yourself (DIY) and Tax Professional software packages must include this information in your software. The message is expected to be displayed within the software in a way to maximize the likelihood the message is read.

URL: <https://www.state.nj.us/treasury/taxation/payments-notices.shtml>

Agency questions

This section represents questions NJDORES has for the software provider about their product.

Specific Questions

1. Do you support unlinked jurisdictional returns?

- a. Yes
- b. No

2. What refund products or payment vehicles do you offer your customers? If you partner with an entity to provide refunds (e.g. Amazon.com or other pre-paid cards), please provide the names and bank routing numbers (RTNs) of each company. Attach a separate sheet if necessary.

Acknowledgments and signature

By signing this agreement, I agree to provide true, accurate, current, and complete information and my company agrees to all the requirements listed in this document.

NJDORES reserves the right to deny, suspend or terminate my company's ability to submit returns.

AUTHORIZED REPRESENTATIVE PRINTED NAME	AUTHORIZED REPRESENTATIVE EMAIL ADDRESS	
AUTHORIZED REPRESENTATIVE SIGNATURE	AUTHORIZED REPRESENTATIVE PHONE NUMBER	DATE

Authorized access to the State of New Jersey Secure Portal

Access to the State Exchange System should be limited to those with a business need.

Provide information for each employee who needs access to the New Jersey Secure Portal

NOTE: Include all authorized individuals, even if listed previously on this form.

First and last name	Phone number	Email address
	Authorized access <input type="checkbox"/> Substitute Forms <input type="checkbox"/> E-file	Tax types
First and last name	Phone number	Email address
	Authorized access <input type="checkbox"/> Substitute Forms <input type="checkbox"/> E-file	Tax types
First and last name	Phone number	Email address
	Authorized access <input type="checkbox"/> Substitute Forms <input type="checkbox"/> E-file	Tax types
First and last name	Phone number	Email address
	Authorized access <input type="checkbox"/> Substitute Forms <input type="checkbox"/> E-file	Tax types
First and last name	Phone number	Email address
	Authorized access <input type="checkbox"/> Substitute Forms <input type="checkbox"/> E-file	Tax types