D-407TC

2023 ESTATES AND TRUSTS TAX CREDIT SUMMARY (REVISION 8-17-23)

CHANGES FOR THE YEAR

- Barcode, revision date, tax year references, and verbiage updated.

Production Details:

Submission Approval Start Date:	November 17, 2023
Target Date for Initial Submission:	December 13, 2023
Required Approval Date:	January 3, 2024
Form Period Date Effective:	Calendar Year December 31, 2023; Fiscal Year November 30, 2024
For Filing Periods	December 2023 and later
Form Placed in Software:	After December 31, 2023
Unchanged/Updated:	Updated

9-12 TEST SAMPLES REQUIRED:

- 1 Blank
- 1 Full Field
- 7 by PDF or 10 by Mail

Note: This form is part of a set; all forms in the set require approval.

BARCODE:

The barcode must read 71203XX022. Replace (XX) with your two-digit Software Developer Identification Number

Align barcode between Row 17, Column 75-79 and Row 32, Column 75-79. Print the number above the barcode.

USE:

- 12 point Courier for scanband
- All capital letters for variable text
- Correct barcode length
- Correct matching line geometry
- Data placement from SD version
- High resolution bitmap for barcodes
- Matching alignment between the full field and test samples
- Various ID numbers using prefixes of 999, 900, 000 or 666 for FEINs/SSNs

BARCODE DIMENSIONS:

- MAKE SURE THE BARCODE READS AND IS PROPERLY PLACED BASED ON THE SPECIFICATIONS GIVEN
- SYMBOLOGY CODE 39
- DENSITY 4.18 CPI
- HEIGHT 0.500
- HIGH RESOLUTION BITMAP FOR BARCODES
- RATIO 3:1

TEST SAMPLES:

- CONFIRM DATA/TEXT PLACEMENT MATCHES THE SD VERSION
- PLEASE NOTE: BLANK AND FULL FIELD ARE REQUIRED BUT ARE NOT CONSIDERED TEST SAMPLES
- IF SENDING IN BY EXPRESS MAIL, PLEASE SEND ADDITIONAL TEST SAMPLES AS REQUIRED
- USE THE FIELD DESCRIPTION FORMATTING FOR PLACEMENT OF VARIABLE DATA
- INCLUDE ONE TEST SAMPLE EXCEEDING $999.00
- USE A DIFFERENT AMOUNT FOR EACH FIELD
- ENSURE EACH LINE IS POPULATED ACROSS REQUIRED TEST SAMPLES

Placement of Variable Data

Print Line Number	Identification	Begin Print Position	Maximum Field Length	End Print Position	Field Description
8	Legal Name	26	10	35	Alphanumeric
8	FEIN	54	9	62	Numeric
11	Line 01	8	2	9	01
11	Line 01	12	8	19	Numeric
11	Line 05	27	2	28	05
11	Line 05	31	8	38	Numeric
11	Line 12	46	2	47	12
11	Line 12	51	8	58	Numeric
11	Line 17	66	2	67	17
11	Line 17	70	9	78	Numeric
13	Line 02	8	2	9	02
13	Line 02	12	8	19	Numeric
13	Line 06	27	2	28	06
13	Line 06	31	8	38	Numeric
13	Line 13	46	2	47	14
13	Line 13	51	8	58	Numeric
13	Line 18	66	2	67	18
13	Line 18	70	9	78	Numeric
15	Line 03	8	2	9	03
15	Line 03	12	8	19	Numeric
15	Line 07	27	2	28	07
15	Line 07	31	8	38	Numeric
15	Line 15	46	2	47	15
15	Line 15	50	9	58	Numeric
17	Line 04	8	2	9	04
17	Line 04	12	8	19	Numeric
17	Line 08	27	2	28	08
17	Line 08	31	8	38	Numeric

| 17 | Line 16 | 46 | 2 | 47 | 16 |
| 17 | Line 16 | 50 | 9 | 58 | Numeric |