

NC-EDU

NC EDUCATION ENDOWMENT FUND CONTRIBUTION (INSTRUCTIONS 12-1-21 FORM REVISION 10-23-14)

CHANGES FOR THE YEAR

- Form Instructions were not updated for 2024.
- Form NC-EDU was not updated for 2024.
- If your company reproduced Form NC-EDU last year, your alignment and data placement for the form should match the approved trained version.
- If your company has not reproduced Form NC-EDU, then match the SD version.

Production Details:

Submission Approval Start Date:	September 20, 2024
Target Date for Initial Submission:	October 11, 2024
Required Approval Date:	November 1, 2024
Form Period Date Effective:	Calendar Year December 31, 2024; Fiscal Year November 30, 2025
For Filing Periods:	December 2024 and later
Form Placed in Software:	After December 31, 2024
Unchanged/Updated:	Unchanged

9-12 TEST SAMPLES REQUIRED:

- 1 Blank
- 1 Full Field
- 7 by PDF or 10 by Express Mail which must include the following:
 - 1 Foreign
 - 1 Fiscal Year

Note: If you do not support one of the required types, list as a limitation.

BARCODE:

The barcode must read 13201XX001. Replace (XX) with your two-digit Software Provider ID (SPID).

Align barcode between Row 61, Column 41-66 and Row 63, Column 41-66. Print the number above the barcode.

USE:

- 12-point Courier font in scanline
- 12-point Courier font for variable data
- All capital letters for variable data
- Amount due with 0.00 format
- Correct barcode length
- Correct Check Digits
- Correct matching line geometry
- Data placement from SD version
- Foreign zip code of 00000
- Function Code 19208 (Individual)
- Function Code 19224 (C/S Corporate)
- Function Code 19216 (Estates/Trusts)
- Function Code 19232 (Partnerships)
- High resolution bitmap for barcode
- Limitation if fiscal year not supported
- Matching alignment between the full field and test samples
- No punctuation or special characters in address field
- Period Ending Chart
- Various ID numbers using the prefixes of 999, 900, 000 or 666 for SSNs

BARCODE DIMENSIONS:

- BARCODE LENGTH MUST MEASURE MORE THAN 2 5/8" BUT LESS THAN 2 3/4" FOR NEW SOFTWARE PROVIDERS
- IF YOUR COMPANY SUPPORTED THIS FORM FOR 2023, DO NOT UPDATE THE ALIGNMENT, PLACEMENT OR BARCODE DIMENSIONS ON YOUR 2024 UNCHANGED FORM
- SYMBOLOGY CODE 39
- DENSITY 4.18 CPI
- HEIGHT 0.500
- HIGH RESOLUTION BITMAP FOR BARCODES
- RATIO 3:1

TEST SAMPLES:

- IF YOUR COMPANY SUPPORTED THIS FORM FOR 2023, DO NOT SHIFT VERBIAGE AND LINE NUMBERS ON YOUR 2024 UNCHANGED FORM TEST SAMPLES
- PLEASE NOTE: BLANK AND FULL FIELD ARE REQUIRED BUT ARE NOT CONSIDERED TEST SAMPLES
- INCLUDE ONE TEST SAMPLE EXCEEDING \$999.00
- INCLUDE ONE FOREIGN TEST SAMPLE
- INCLUDE ONE TEST SAMPLE FOR EACH OF THE (5) CORRESPONDING FUNCTION CODES
- INCLUDE ONE TEST SAMPLE SHOWING PRIMARY TAXPAYER AND SPOUSE WITH SSNs
- IF SENDING IN BY EXPRESS MAIL, PLEASE SEND ADDITIONAL TEST SAMPLES AS REQUIRED
- USE THE FIELD DESCRIPTION FORMATTING FOR PLACEMENT OF VARIABLE DATA
- USE A DIFFERENT AMOUNT FOR EACH FIELD
- ENSURE EACH LINE IS POPULATED ACROSS REQUIRED TEST SAMPLES

Required Variety of NC-EDU Test Samples			
Period Beginning	Period Ending	Type of Filer: Calendar, Fiscal or Short Year	Scan Line with Check Digit
01/01/24	12/31/24	Calendar	12246
02/01/24	01/31/25	Fiscal	01252
03/01/24	02/28/25	Fiscal	02259
04/01/24	03/31/25	Fiscal	03255
05/01/24	04/30/25	Fiscal	04251
06/01/24	05/31/25	Fiscal	05258
07/01/24	06/30/25	Fiscal	06254
08/01/24	07/31/25	Fiscal	07251
09/01/24	08/31/25	Fiscal	08257
10/01/24	09/30/25	Fiscal	09253
11/01/24	10/31/25	Fiscal	10251
12/01/24	11/30/25	Fiscal	11258
05/01/24	12/31/24	Short	12246

Placement of Variable Data

Print Line Number	Identification	Begin Print Position	Maximum Field Length	End Print Position	Field Description
50	Entity Legal Name	8	36	43	Alphanumeric
50	FEIN	47	9	55	Numeric: No Dashes
50	Calendar Year	75	4	78	Numeric "2024" or blank
51	Other Tax Year Beg.	71	8	78	Numeric: Starting Date 02 01 24 No Punctuation
52	T/P First Name	8	14	21	Alpha
52	T/P Middle Initial	23	1	23	Alpha
52	T/P Last Name	25	19	43	Alpha
52	T/P SSN	47	9	55	Numeric: No Dashes
52	And Ending	71	8	78	Numeric: Ending Date 01 31 25 No Punctuation
54	Spouse First Name	8	14	21	Alpha
54	Spouse Middle Initial	23	1	23	Alpha
54	Spouse Last Name	25	19	43	Alpha
54	Spouse SSN	47	9	55	Numeric: No Dashes
56	Address	8	35	42	Alphanumeric
56	Foreign Country	45	10	54	Alpha: if applicable
57	City	8	20	27	Alpha
57	State	30	2	31	Alpha
57	Zip Code	34	5	38	Numeric: 5-digit zip code If Foreign address, enter 5 zeroes.
57	Total Contribution	65	11	75	Numeric: with 0.00