

**STATE OF HAWAII
DEPARTMENT OF TAXATION**



**General Information
and Scannable Specifications
for
Schedule CR (Rev. 2020)**

Contact Information for General Questions

Hawaii Department of Taxation
Technical Section
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**Contact Information for Mailing
Test Packages and Testing Inquiries**

Hawaii Department of Taxation
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Assurance Test Team
830 Punchbowl Street, Rm 126
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Note: Reproduced forms must meet the requirements as established in this document and our current Forms Reproduction Policy.

Schedule CR (Rev. 2020)

General Information and Scannable Specifications

This document provides software vendors with the requirements for reproducing Schedule CR. Schedule CR is designed for electronic scanning that permits faster processing with fewer errors. Software developers who reproduce, develop, or distribute Schedule CR must create the form so the variable data (specified fields containing

taxpayer information) are printed in a fixed format that can be read by the Department's IBML scanners.

Substitute scannable forms **MUST** meet the requirements as established in this document and our current Forms Reproduction Policy, and be approved prior to release or distribution.

GENERAL INFORMATION**1. Substitute Form**

- We highly recommend you use the Department's official Form Schedule CR PDF.
- If you do not use the Department's official PDF, the substitute form must match the Department's form in layout and appearance including **bold** and/or *italics* fonts as they appear on the official form.
- Lines of text in a paragraph must break at the same location as the official form.
- All forms and variable data must have a high standard of legibility for printing.
- Photocopies of the scannable form must not be submitted to the Department for processing.
- Substitute scannable forms must be proofread prior to submission.

2. Paper and Ink

- The paper size is 8.5 inches by 11 inches, the same size as the Department's original form. The paper weight must be at least 20 pound white bond and the page orientation is portrait.
- Black ink should be used in printing the text on the form and the variable data.

3. Fonts

- The form was designed using the following font:
 1. Helvetica
- The following fonts and sizes should be used for the form number and revision year located at the top left corner of the form:
 1. SCHEDULE CR: 10 pt Helvetica bold
 2. REV. 2020: 10 pt Helvetica
- The following font and size should be used for the form number located at the bottom right corner of the form:
 1. SCHEDULE CR (REV. 2020): 10 pt Helvetica bold

4. Variable Data

- All variable data fields must utilize 12 pt Courier font.
- All variable data fields require exact placement.
- Print all alpha characters uppercase.
- Use a bold X (**X**) as a checkbox indicator. See exhibit for exact placement. The use of a checkmark is not acceptable.

5. Variable Data Delimiters

- Tax Year Beginning and Tax Year Ending must be printed with spaces between the dash (-) delimiter. For example:
MM - DD - YYYY
(2 digits for month, followed by a space, followed by a dash (-), followed by a space, followed by 2 digits for day, followed by a space, followed by a dash (-), followed by a space, followed by 4 digits for the tax year ending).

6. Dollar Amounts

123456789

- Do not use commas as thousand separators.
- Do not use leading dollar signs.
- Amounts are right justified.
- Amounts must be rounded. Dollar and cent signs should not be used when the field is rounded to whole dollars.

7. Testing and Approval of the Scannable Form

- A minimum of 5 hardcopy test samples must be provided to ensure proper testing including 1 hardcopy test sample that contains all maximized fields (one alpha "X" or numeric "9" character space with no leading or trailing spaces).
- Test samples must be originals. Photocopies, fax submissions, etc. will not be accepted.
- Test samples must be populated with unique sample variable data showing different scenarios.

- It will require 1 to 2 weeks, upon receipt by the Department, to verify the accuracy of the submitted samples.
- Approval of the facsimile must be obtained from the Department **prior** to filing.
- Schedule CR (Rev. 2020) cannot be filed until 2021.

SCANNABLE SPECIFICATIONS

1. Layout

- The form was designed on a 6x10 grid. See exhibits.
- Open space around variable data fields should be adhered to as much as possible except for the areas that do not require optical character recognition. Do not place any additional information in these areas.

2. Hawaii Vendor I.D. Number

- Print your 2-digit Hawaii Vendor I.D. Number following the "ID NO" label at the following positions:
 1. Pages 1-2: The 2-digit Hawaii Vendor I.D. Number should begin at column 27, row 64.

3. QR Code

- A QR code is specific to the form. The property of the 2D symbology QR code is measured in CM.
- Placement of the QR code is as follows (see exhibit for exact placement):
 1. Pages 1-2: The left bottom corner of the QR code is at the beginning of column 6 and at the bottom of row 9.
- Height of the QR code is 0.5 inch.
- Length of the QR code is 0.5 inch.
- Narrow Module Size is set to 0.18.
- Margin is set to 0.18.
- Open space surrounding the QR code should be adhered to as much as possible.
- DO NOT stretch the QR code image.
- The required QR code for page 1 is SCHCR_T 2020A 01 VIDXX

The required QR code for page 2 is
SCHCR_T 2020A 02 VIDXX

The QR code includes the form number (SCHCR), an underscore, type of form (T), space, 4-digit form year (2020), 1-letter revision indicator (A), space, 2-digit page number (01) or (02), space, vendor I.D. label (VID), and your 2-digit Hawaii Vendor I.D. Number (XX). There are no hyphens.

- The human readable text for the QR code MUST be printed at the bottom of each page at column 6, row 64, utilizing 6 pt Helvetica font.
- Please do not print the outline around the human readable text and QR code. These were only used to show the placement of the human readable text and QR code.
- DO NOT use Windows Metafile Format (wmf). This format causes a very low read rate by the Department's IBML scanners.

4. Acetate overlays

- Acetate overlays will assist in the exact data field placement. Verify your form samples with the overlays prior to submitting them for testing. If the samples do not match the overlays within 1/16 inch, do not submit them for approval as they will be rejected.
- Acetate overlays will be mailed to vendors who submitted a Letter of Intent to participate in the Forms Reproduction Program and who will be reproducing Schedule CR. If you did not receive the acetate overlays, please contact the Forms Coordinator.

SCHEDULE OF TAX CREDITS

Place QR Code Here

or other tax year beginning 12 - 12 - 1212 and ending 12 - 12 - 1212

Attach this schedule directly behind Form N-11, N-15, N-30, N-40 or N-70NP

Name(s) as shown on return SSN(s) or Federal Employer I.D. No. NAME (S) AS SHOWN ON RETURN XXXXXXXXXXXXXXXXXXXXXXXXXXXX 123-45-6789 123-45-6789

PART I Refundable Tax Credits

- 1 Capital Goods Excise Tax Credit (attach Form N-312) 123456789 1
2 Fuel Tax Credit for Commercial Fishers (attach Form N-163) 123456789 2
3 Motion Picture, Digital Media, and Film Production Income Tax Credit (attach Form N-340) 123456789 3
4 Place an X in the appropriate box for the type of energy system installed and placed in service: Solar X Wind X
Renewable Energy Technologies Income Tax Credit (For Systems Installed and Placed in Service on or After July 1, 2009) (attach Form N-342) 123456789 4
5 Important Agricultural Land Qualified Agricultural Cost Tax Credit (attach Form N-344) 123456789 5
6 Tax Credit for Research Activities (attach Form N-346) 123456789 6
7 Other refundable credits
a. Pro rata share of taxes withheld and paid by a partnership, estate, trust, or S corporation on the sale of Hawaii real property interests 7a 123456789
b. Credit From a Regulated Investment Company 7b 123456789
c. Add lines 7a and 7b 123456789 7c
8 Total Refundable Credits. Add lines 1 through 6 and line 7c. Enter here and on Form N-11, line 32; N-15, line 49; N-30, line 12; N-40, Schedule G, line 2; or N-70NP, line 17. Attach this schedule directly behind your Form N-11, N-15, N-30, N-40 or N-70NP. 123456789 8

PART II Nonrefundable Tax Credits

- 9 Income tax paid to another state or foreign country (N-11, N-15, N-40, and N-70NP filers) (Attach copy of tax return(s) from other state(s) or federal Form(s) 1116. See tax return instruction booklet for more information.) 123456789 9
10 Enterprise Zone Tax Credit (attach Form N-756) 123456789 10
11 Carryover of the Credit for Energy Conservation (attach Form N-323) 123456789 11
12 Carryover of the High Technology Business Investment Tax Credit (attach Form N-323) 123456789 12
13 Carryover of the Individual Development Account Contribution Tax Credit (attach Form N-323) 123456789 13
14 Carryover of the Technology Infrastructure Renovation Tax Credit (attach Form N-323) 123456789 14
15 Carryover of the Hotel Construction and Remodeling Tax Credit (attach Form N-323) 123456789 15
16 Carryover of the Residential Construction and Remodeling Tax Credit (attach Form N-323) 123456789 16

Column (b) Total Credit Applied to this Tax Year

Column (c) Unused Credit Carryover to Next Tax Year

(Part II continued on Page 2)

SCHEDULE CR (REV. 2020)

Place QR Code Here Name(s) as shown on return NAME(S) AS SHOWN ON RETURN XXXXXXXXXXXXXXXXXXXXXXXX SSN(s) or Federal Employer I.D. No. 123-45-6789 123-45-6789

Column (a) Total New Credit Claimed for this Tax Year

Column (b) Total Credit Applied to this Tax Year

Column (c) Unused Credit to Carryover to Next Tax Year

Table with 3 main columns: Description, Column (a), Column (b), and Column (c). Rows include items 17-29 such as 'Carryover of the Renewable Energy Technologies Income', 'Attach Form N-586', 'Attach Form N-884', 'Attach Form N-330', 'Attach Form N-342', 'Attach Form N-348', 'Attach Form N-350', 'Attach Form N-352', 'Attach Form N-354', 'Attach Form N-356', 'Attach Form N-358', 'Attach Form N-325', and 'Total Nonrefundable Credits'.

SCHEDULE OF TAX CREDITS

Place
QR Code
Here

or other tax year beginning 12 - 12 - 1212 and ending 12 - 12 - 1212

Attach this schedule directly behind Form N-11, N-15, N-30, N-40 or N-70NP

Name(s) as shown on return NAME (S) AS SHOWN ON RETURN XXXXXXXXXXXXXXXXXXXXXXXXXXXX	SSN(s) or Federal Employer I.D. No. 123-45-6789 123-45-6789
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PART I Refundable Tax Credits

1 Capital Goods Excise Tax Credit (attach Form N-312).....	123456789	1●
2 Fuel Tax Credit for Commercial Fishers (attach Form N-163).....	123456789	2●
3 Motion Picture, Digital Media, and Film Production Income Tax Credit (attach Form N-340).....	123456789	3●
4 Place an X in the appropriate box for the type of energy system installed and placed in service: Renewable Energy Technologies Income Tax Credit (For Systems Installed and Placed in Service on or After July 1, 2009) (attach Form N-342).....	● X Solar ● X Wind 123456789	4●
5 Important Agricultural Land Qualified Agricultural Cost Tax Credit (attach Form N-344).....	123456789	5●
6 Tax Credit for Research Activities (attach Form N-346).....	123456789	6●
7 Other refundable credits		
a. Pro rata share of taxes withheld and paid by a partnership, estate, trust, or S corporation on the sale of Hawaii real property interests.....	7a● 123456789	
b. Credit From a Regulated Investment Company.....	7b● 123456789	
c. Add lines 7a and 7b.....	123456789	7c
8 Total Refundable Credits. Add lines 1 through 6 and line 7c. Enter here and on Form N-11, line 32; N-15, line 49; N-30, line 12; N-40, Schedule G, line 2; or N-70NP, line 17. <i>Attach this schedule directly behind your Form N-11, N-15, N-30, N-40 or N-70NP.</i>	123456789	8●

PART II Nonrefundable Tax Credits

9 Income tax paid to another state or foreign country (N-11, N-15, N-40, and N-70NP filers) (Attach copy of tax return(s) from other state(s) or federal Form(s) 1116. See tax return instruction booklet for more information.).....	123456789	9●
10 Enterprise Zone Tax Credit (attach Form N-756).....	123456789	10●
	Column (b) Total Credit Applied to this Tax Year	Column (c) Unused Credit Carryover to Next Tax Year
11 Carryover of the Credit for Energy Conservation (attach Form N-323).....	123456789	123456789 11●
12 Carryover of the High Technology Business Investment Tax Credit (attach Form N-323).....	123456789	123456789 12●
13 Carryover of the Individual Development Account Contribution Tax Credit (attach Form N-323).....	123456789	123456789 13●
14 Carryover of the Technology Infrastructure Renovation Tax Credit (attach Form N-323).....	123456789	123456789 14●
15 Carryover of the Hotel Construction and Remodeling Tax Credit (attach Form N-323).....	123456789	123456789 15●
16 Carryover of the Residential Construction and Remodeling Tax Credit (attach Form N-323).....	123456789	123456789 16●

(Part II continued on Page 2)

Place
QR Code
Here

Name(s) as shown on return
NAME (S) AS SHOWN ON RETURN
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

SSN(s) or Federal Employer I.D. No.
123-45-6789
123-45-6789

	Column (a) Total New Credit Claimed for this Tax Year	Column (b) Total Credit Applied to this Tax Year	Column (c) Unused Credit to Carryover to Next Tax Year	
17 Carryover of the Renewable Energy Technologies Income Tax Credit (For Systems Installed and Placed in Service Before July 1, 2009) (attach Form N-323)	123456789	123456789	123456789	17●
18 Attach Form N-586	123456789	123456789	123456789	18●
19 Attach Form N-884	123456789	123456789	123456789	19●
20 Attach Form N-330	123456789	123456789	123456789	20●
21 Place an X in the appropriate box for the type of energy system installed and placed in service:			<input checked="" type="checkbox"/> Solar <input checked="" type="checkbox"/> Wind	
Attach all Form(s) N-342	123456789	123456789	123456789	21●
22 Attach Form N-348	123456789	123456789	123456789	22●
23 Attach Form N-350	123456789	123456789	123456789	23●
24 Attach Form N-352	123456789	123456789	123456789	24●
25 Attach Form N-354	123456789	123456789	123456789	25●
26 Attach Form N-356 (N-11 and N-15 filers only) ...	123456789	123456789	123456789	26●
27 Attach Form N-358 (N-11 and N-15 filers only) ...	123456789	123456789	123456789	27●
28 Attach Form N-325	123456789	123456789	123456789	28●
29 Total Nonrefundable Credits. Add lines 9, 10 and Column (b) of lines 11 through 28. Enter here and on Form N-11, line 35; N-15, line 52; N-30, line 14; N-40, Schedule G, line 4; or N-70NP, line 19. <i>Attach this schedule directly behind your Form N-11, N-15, N-30, N-40 or N-70NP.</i>		123456789		29●