

D-407

2019 ESTATES AND TRUSTS INCOME TAX RETURN (REVISION 8-28-19)

CHANGES FOR THE YEAR

- Revision date updated to 8-28-19.
- Barcode, line geometry and tax year references updated.
- "DOR Use Only" box added.
- New indicator for Federal Extension is a required field.
 - Y/N selection required in the demographic section.
 - Y/N response flows into the scan band.
- Signature area and other verbiage 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 71201XX021. Replace (XX) with your two-digit Software Developer Identification Number.

Align barcode between Row 30, Column 75-79 and Row 45, Column 75-79. Print the number above the barcode.

USE:

- All capital letters for variable text
- Correct barcode length
- Correct matching line geometry
- Data placement from SD version
- Hard coded year "19" for the tax year - including blank copy
- High resolution bitmap for barcodes
- Matching alignment between the full field and test samples
- No punctuation or special characters in address field
- Proper format when data of paid preparer ID and telephone number flows into scan band
- Various ID numbers using the prefixes of 999, 900, 000 or 666 for SSNs

Placement of Variable Data

Print Line Number	Identification	Begin Print Position	Maximum Field Length	End Print Position	Field Description
9	Fiscal Year Beginning	45	8	52	Numeric; No Punctuation Starting Date. Ex. 03 01 19 19 must be hard coded
9	And Ending	65	8	72	Numeric; No Punctuation Ending Date. Ex. 02 29 20
29	Legal Name	6	4	9	Alphanumeric 1 st four characters of legal name
29	Address	13	4	16	Alphanumeric; 1 st four characters of address
29	Zip Code	20	5	24	Numeric; 5-digit zip code
29	Initial Return	28	2	29	IR
29	Initial Return	32	1	32	Alpha; Y or N Y: Yes N: No
29	Amended Return	36	2	37	AR
29	Amended Return	40	1	40	Alpha; Y or N Y: Yes N: No
29	Final Return	44	2	45	FR
29	Final Return	48	1	48	Alpha; Y or N Y: Yes N: No
29	NR Beneficiaries	52	3	54	NRB
29	NR Beneficiaries	57	1	57	Alpha; Y or N Y: Yes N: No
29	Qualified Funeral Trust	61	3	63	QFT
29	Qualified Funeral Trust	66	1	66	Alpha; Y or N Y: Yes N: No
31	Name of Estate or Trust	6	40	45	Alphanumeric
31	FEIN	49	9	57	Numeric; No dashes Print number consecutively
31	Final Distribution of Assets	61	3	63	FDA
31	Final Distribution Assets	68	1	68	Alpha; Y or N Y: Yes N: No

33	Name of Estate or Trust	6	40	45	Alphanumeric
33	Federal Extension	61	5	65	Alpha
33	FDEXT	68	1	68	Alpha: Y or N Y: Yes N: No
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35	Address	6	31	36	Alphanumeric
35	Apartment Number	39	5	43	Alphanumeric
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37	City	6	18	23	Alpha
37	State	26	2	27	Alpha
37	Zip Code	30	10	39	Numeric; Print 9-digit zip code Add (-) before 4 digit zip code
37	Line 15A	52	3	54	15A
37	Line 15A	62	6	67	Numeric
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39	Line 01	6	2	7	01
39	Line 01	11	11	21	Numeric; "-"
39	Line 09	29	2	30	09
39	Line 09	35	10	44	Numeric
39	Line 15B	52	3	54	15B
39	Line 15B	62	6	67	Numeric
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41	Line 02	6	2	7	02
41	Line 02	12	10	21	Numeric
41	Line 10	29	2	30	10
41	Line 10	35	10	44	Numeric
41	Line 16	52	2	53	16
41	Line 16	58	10	67	Numeric
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43	Line 04	6	2	7	04
43	Line 04	12	10	21	Numeric
43	Line 11	29	2	30	11
43	Line 11	35	10	44	Numeric
43	Line 18	52	2	53	18
43	Line 18	58	10	67	Numeric

45	Line 06	6	2	7	06
45	Line 06	11	11	21	Numeric; "-"
45	Line 12	29	2	30	12
45	Line 12	35	10	44	Numeric
45	Line 19	52	2	53	19
45	Line 19	60	8	67	Numeric
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47	Line 08	6	2	7	08
47	Line 08	12	10	21	Numeric
47	Line 14	29	2	30	14
47	Line 14	35	10	44	Numeric
47	Line 21	52	2	53	21
47	Line 21	58	10	67	Numeric