SP Checklist

08/30/21

Use the SP Checklist to ensure the accuracy of forms submitted.

Barcode:

☐ (A) Make sure the barcode is generated as a high resolution bitmap.

☐ (B) Make sure the barcode reads as and is the correct barcode *number* for your company.

☐ (C) Make sure the barcode *number* is properly placed based on specifications given.

☐ (D) Make sure the barcode is properly placed based on specifications given.

☐ (E) Make sure the barcode is the correct size based on specifications given.

☐ (F) Regenerate an unchanged form's barcode to ensure the barcode will scan.

Line Geometry:

☐ (G) Ensure the line geometry matches the required SD or approved trained version.

☐ (H) Make sure lines are solid, not too thin or too bold. Lines should be consistent throughout.

☐ (I) Use 1 point thickness for line geometry.

Scan Band/Lines:

☐ (J) Make sure the variable scanband data is in 12 point "Courier".

☐ (K) Make sure the variable scanline data is in 12 point "Courier".

☐ (L) Ensure all required data flows into scanband/line to the correct line with correct amount.

☐ (M) Use the correct *period* end date and check digit from the period ending chart provided.

☐ (N) Calculate the correct check digit for account identification or SSN/FEIN in the scanline.

☐ (O) Use the correct *function code* and check digit from the period ending chart provided.

☐ (P) Update all fields with an amount or "0" or a "Y/N" for yes/no indicators in the scanband.

☐ (Q) Update the field(s) to show the correct number of characters in scanband.

Data and Placement:

☐ (R) Confirm all data captured fields are included, populated and correctly placed.

☐ (S) Confirm money is formatted to two decimals as "0.00" with no commas, right justified.

☐ (T) Make sure all data fields match length and variable letters shown on the SD Version.

☐ (U) Make sure all data fields are formatted for the proper alpha/numeric field(s).

☐ (V) Verify all variable text is correct and in capital letters.

Form's Alignment:

☐ (W) Confirm data/text placement matches the required SD or approved trained version.

☐ (X) Verify the unchanged form matches the line alignment of the approved trained version.

Test Samples:

- [ ] (Y) Send the correct number and variety of test samples as requested on the form's spec.
- [ ] (Z) Verify test samples data match and align with the full field data.
- [ ] (AA) Confirm form and/or instructions have the correct revision date.
- [ ] (BB) Make sure the current year is hardcoded on applicable forms.
- [ ] (CC) List any limitations on the e-mail/header sheet.
- [ ] (CC) Format addresses without any punctuation as required.
- [ ] (DD) Use the correct postal abbreviations.
- [ ] (EE) Make sure print is not too light or too dark and that printing is not skewed.
- [ ] (FF) Reproduce bullets, and/or special characters as required for the form.
- [ ] (GG) Use the correct prefixes of 999, 900, 666 or 000 for FEINs/SSNs.
- [ ] (HH) Include foreign zip code test samples for forms D-400V, D-400V Amended, D-410, D-410P, NC-40 or NC-EDU.
- [ ] (II) Include test samples with taxpayer middle initials or negative line values as required.
- [ ] (JJ) Verify the form does not have NCDOR logo or invalid symbols when submitting.
- [ ] (KK) Verify the form has no invalid symbols when submitting.

Forms are expected to be submitted and approved within (30) days of the posted date.

The final version of the form must be submitted at least (5) business days prior to the approval dates noted in instructions.

All forms should be approved in three (3) or fewer attempts.

E-mail PDF submissions to SDFormsUpdate@ncdor.gov

Use the naming scheme and instructions for PDF submissions on the NCDOR public website at:
https://files.nc.gov/ncdor/documents/files/howto_provide_forms.pdf

Use the address below to send submissions in by Courier Mail:
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