

# NC-EDU

## NC EDUCATION ENDOWMENT FUND CONTRIBUTION

### (REVISION 10-23-14/ INSTRUCTIONS 12-1-21)

#### CHANGES FOR THE YEAR

- Form NC-EDU added new designation/function code to include contributions from Partnerships in 2022.
- Form NC-EDU added new designation to include contributions from S Corporations in 2022; use Function Code 19224 for contributions from S Corporations.
- If your company reproduced Form NC-EDU last year, your 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:

<b>Approved By Date:</b>	December 2, 2022
<b>Form Period Date Effective:</b>	Calendar Year December 31, 2022; Fiscal Year November 30, 2023
<b>For Filing Periods</b>	December 2022 and later
<b>Form Placed in Software:</b>	After December 31, 2022
<b>Unchanged/Updated:</b>	Unchanged

### 9-12 TEST SAMPLES REQUIRED:

- 1 Blank
- 1 Full Field
- 7 by PDF or 10 by 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 Developer Identification Number.

Align barcode between Row 61, Column 41-46 and Row 63, Column 41-46. Print the number above the barcode.

### USE:

- 12 point Courier font in scanline
- 12 point Courier font for variable fields
- All capital letters for variable text
- 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 2021, DO NOT UPDATE THE ALIGNMENT, PLACEMENT OR BARCODE DIMENSIONS ON YOUR 2022 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 2021, DO NOT SHIFT VERBIAGE AND LINE NUMBERS ON YOUR 2022 UNCHANGED FORM TEST SAMPLES
- PLEASE NOTE: BLANK AND FULL FIELD ARE REQUIRED BUT ARE NOT CONSIDERED TEST SAMPLES
- ENTER 5 ZEROES IN FOREIGN ZIP CODE FIELD(S)
- INCLUDE ONE TEST SAMPLE EXCEEDING \$999.00
- 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
01/01/22	12/31/22	Calendar	12220
02/01/22	01/31/23	Fiscal	01236
03/01/22	02/28/23	Fiscal	02232
04/01/22	03/31/23	Fiscal	03239
05/01/22	04/30/23	Fiscal	04235
06/01/22	05/31/23	Fiscal	05231
07/01/22	06/30/23	Fiscal	06238
08/01/22	07/31/23	Fiscal	07234
09/01/22	08/31/23	Fiscal	08231
10/01/22	09/30/23	Fiscal	09237
11/01/22	10/31/23	Fiscal	10235
12/01/22	11/30/23	Fiscal	11231
05/01/22	12/31/22	Short	12220

**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 Print number consecutively
50	Calendar Year	75	4	78	Numeric "2022" or blank
51	Other Tax Year Beg.	71	8	78	Numeric; No Punctuation Starting Date. Ex. 02 01 22
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 Print number consecutively
52	And Ending	71	8	78	Numeric; No Punctuation Ending Date Ex. 01 31 23
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 Print number consecutively
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 <b>If Foreign address, enter 5 zeroes.</b>
57	Total Contribution	65	11	75	Numeric; with 0.00