

NC-EDU

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

CHANGES FOR THE YEAR

- Form NC-EDU was not updated for 2023.
- 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 1, 2023 |
| Target Date for Initial Submission: | September 25, 2023 |
| Required Approval Date: | October 16, 2023 |
| Form Period Date Effective: | Calendar Year December 31, 2023; Fiscal Year November 30, 2024 |
| For Filing Periods: | December 2023 and later |
| Form Placed in Software: | After December 31, 2023 |
| Unchanged/Updated: | 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 2022, DO NOT UPDATE THE ALIGNMENT, PLACEMENT OR BARCODE DIMENSIONS ON YOUR 2023 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 2022, DO NOT SHIFT VERBIAGE AND LINE NUMBERS ON YOUR 2023 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 |
| 01/01/23 | 12/31/23 | Calendar | 12238 |
| 02/01/23 | 01/31/24 | Fiscal | 01244 |
| 03/01/23 | 02/29/24 | Fiscal | 02241 |
| 04/01/23 | 03/31/24 | Fiscal | 03247 |
| 05/01/23 | 04/30/24 | Fiscal | 04243 |
| 06/01/23 | 05/31/24 | Fiscal | 05240 |
| 07/01/23 | 06/30/24 | Fiscal | 06246 |
| 08/01/23 | 07/31/24 | Fiscal | 07242 |
| 09/01/23 | 08/31/24 | Fiscal | 08249 |
| 10/01/23 | 09/30/24 | Fiscal | 09245 |
| 11/01/23 | 10/31/24 | Fiscal | 10243 |
| 12/01/23 | 11/30/24 | Fiscal | 11240 |
| 05/01/23 | 12/31/23 | Short | 12238 |

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 "2023" or blank |
| 51 | Other Tax Year Beg. | 71 | 8 | 78 | Numeric; No Punctuation Starting Date. Ex. 02 01 23 |
| 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 24 |
| 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 | Print number consecutively 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 |