

D-407TC

2024 ESTATES AND TRUSTS TAX CREDIT SUMMARY (REVISION 8-19-24)

CHANGES FOR THE YEAR

- Barcode, line geometry, line numbering, revision date, tax year references, and verbiage updated.

Production Details:

Submission Approval Start Date:	November 01, 2024
Target Date for Initial Submission:	November 25, 2024
Required Approval Date:	December 18, 2024
Form Period Date Effective:	Calendar Year December 31, 2024 Fiscal Year November 30, 2025
For Filing Periods:	December 2024 and later
Form Placed in Software:	After December 31, 2024
Unchanged/Updated:	Updated

9-12 TEST SAMPLES REQUIRED:

- 1 Blank
- 1 Full Field
- 7 by PDF or 10 by Express Mail

Note: This form is part of a set; all forms in the set require approval.

BARCODE:

The barcode must read 71203XX023. Replace (XX) with your two-digit Software Provider ID (SPID).

Align barcode between Row 17, Column 75-79 and Row 32, Column 75-79. Print the number above the barcode.

USE:

- 12-point Courier font for variable data
- 12-point Courier font for scanband
- All capital letters for variable data
- Correct barcode length
- Correct matching line geometry
- Data placement from SD version
- High resolution bitmap for barcodes
- Matching alignment between the full field and test samples
- Various ID numbers using prefixes of 999, 900, 000 or 666 for FEINs/SSNs

BARCODE DIMENSIONS:

- MAKE SURE THE BARCODE READS AND IS PROPERLY PLACED BASED ON THE SPECIFICATIONS GIVEN
- SYMBOLOGY CODE 39
- DENSITY 4.18 CPI
- HEIGHT 0.500
- HIGH RESOLUTION BITMAP FOR BARCODES
- RATIO 3:1

TEST SAMPLES:

- CONFIRM DATA/TEXT PLACEMENT MATCHES THE SD VERSION
- PLEASE NOTE: BLANK AND FULL FIELD ARE REQUIRED BUT ARE NOT CONSIDERED TEST SAMPLES
- IF SENDING IN BY EXPRESS MAIL, PLEASE SEND ADDITIONAL TEST SAMPLES AS REQUIRED
- USE THE FIELD DESCRIPTION FORMATTING FOR PLACEMENT OF VARIABLE DATA
- INCLUDE ONE TEST SAMPLE EXCEEDING \$999.00
- USE A DIFFERENT AMOUNT FOR EACH FIELD
- ENSURE EACH LINE IS POPULATED ACROSS REQUIRED TEST SAMPLES

Placement of Variable Data

Print Line Number	Identification	Begin Print Position	Maximum Field Length	End Print Position	Field Description
8	Legal Name	26	10	35	Alphanumeric; 1 st 10 characters
8	FEIN	54	9	62	Numeric
11	Line 01	8	2	9	01
11	Line 01	12	8	19	Numeric
11	Line 05	27	2	28	05
11	Line 05	31	8	38	Numeric
11	Line 12	46	2	47	12
11	Line 12	51	8	58	Numeric
13	Line 02	8	2	9	02
13	Line 02	12	8	19	Numeric
13	Line 06	27	2	28	06
13	Line 06	31	8	38	Numeric
13	Line 13	46	2	47	13
13	Line 13	51	8	58	Numeric
15	Line 03	8	2	9	03
15	Line 03	12	8	19	Numeric
15	Line 07	27	2	28	07
15	Line 07	31	8	38	Numeric
15	Line 15	46	2	47	15
15	Line 15	51	8	58	Numeric
17	Line 04	8	2	9	04
17	Line 04	12	8	19	Numeric
17	Line 08	27	2	28	08
17	Line 08	31	8	38	Numeric
17	Line 16	46	2	47	16
17	Line 16	51	8	58	Numeric