

Oklahoma Tax Commission

1-D and 2-D Guidelines and Specifications

November 1, 2007

Version 0

As of November 7, 2007
Posted on OTC website @ www.tax.ok.gov

Guidelines for Oklahoma 1-D Barcode

New for 2007: The 1-D barcode has been **added to each page of all income tax forms. The 1-D barcode has also been reformatted.** The barcode is a 3 of 9 or code 39. The barcode contains 12 digits all numerical. The barcode carries the year, form type, page number and **creator**. For example, 511 page 1 barcode will read: **20070051101D**. (2007) year, (00511) form type, (01) page 1, (D) Developer (creator). **The schedules will carry the same barcode format with the page number replacing the previous Schedule identification:** Example: last year's 511 Schedule A 1-D barcode read 2006511SCHA. (2006) year, (511) form type (SCH A) first schedule of the page, for 2007 it will read 20070051103D. **Barcodes for non tax year specific forms will carry a 9999 in the year field.**

Placement of 1-D on all pages:

The 1-D barcode is to be placed $\frac{1}{4}$ " from the top of the form and $\frac{1}{2}$ " from the right edge Barcode size is 0.3" height X 13 mils width.

Specifications for the 1-D barcode are available on the website under the developer/preparer link.

Guidelines for Oklahoma 2-D Barcode

The following guidelines are to be upheld for all tax years and all form types which utilize 2-D barcode. Those forms types for 2007 tax year are OK 511, OK 511NR and OK 512.

Field Standards for the 2-D barcode

1. For blank fields use a carriage return
2. Unless otherwise stated in specifications all numerical fields are 9 characters.

Negative values should be formatted with the "-" value placed before the numerical characters. Example: -100

2. Date format should be MMDDYYYY unless the date is the Julian date or otherwise specified.

3. Check boxes should be as printed. If blank use a carriage return, if filled use an X
4. Do not zero fill fields.
5. Truncate any characters over the specified field limit, (example: name or address longer than field length)
6. Do not use any punctuation such as commas, apostrophes, dashes, or other non-essential data. All delimiters should be stripped.
7. All fields should be right justified.
8. Use whole dollars only
9. Percentages should be carried no more than 9 digits to the left of the decimal point. Preferred method is 4 digits to the left.
10. Addresses which contain a rural route number: The rural route number must be indicated as a numerical value, not alpha. In other words if the address is RR2, do not use alpha spelling (two) use the numeric 2.

Guidelines specific to OK 511

1. The 538-S return dependent SSN information **is** included in the 2-D barcode. The 538-S form should be attached to the 511 return when mailed to the Oklahoma Tax Commission
2. If there are more than 5 dependents on the 538-S (not including taxpayer and spouse) the return will **not** be processed by the Oklahoma Tax Commission as a 2-D return. It will be manually data entered.
3. 538-H information is not included in the barcode. The 538-H should be mailed in with the return to the Oklahoma Tax Commission.

Guidelines specific to both 511 and 511NR

1. There must be an entry in the Filing Status and in the Exemptions area. If either of these fields are left blank, the return will not process correctly.

Guidelines specific to 512

1. The 2D barcode for the OK 512 will not hold every schedule that may be required. Only the data from one schedule A, one Schedule B and one Balance Sheet can be accommodated.

Placement of the 2-D barcode

The 2-D barcode must be placed in the white space in the upper right portion of the return. The barcode must be placed no higher than ½” from the bottom of the printed form number or 1-D barcode which ever is closest. The 2-D barcode must be sized to fit the space provided. A minimum ¼” of white space must be present on all sides of the 2-D barcode.

Mailing Address for 2-D returns

Taxpayers are to mail 2-D returns to:

Oklahoma Tax Commission
Income Tax 2-D Return
PO Box 269045
Oklahoma City OK 73126-9045

Testing Process

Those software developers who are supporting Oklahoma 2-D returns must test with the Oklahoma Tax Commission prior to releasing their software to clients or the general public.

511 and 511NR

Test returns for form 511 are to be based off the PATS tests created by the NACTP which are posted on our website. Test returns for form 511NR should be done using the same PATS tests with developer discretion to use whatever residency status and federal data but ensure the federal column of line 19 is populated.

To obtain the NACTP PATS test criteria please email ghulsey@tax.ok.gov, or visit our website www.tax.ok.gov and look under the Developer/Preparer link from the home page.

512

Test returns for the 512 are to be created by the developer ensuring at least 75% of all fields are populated.

Submission of 2-D Barcode Tests

PDF's of the test returns are acceptable and preferable. Test returns should be directed to:

Ginger Hulsey ghulsey@tax.ok.gov

If you choose to send your test returns in by paper please address to:

Ginger Hulsey
Oklahoma Tax Commission
Imaging Department
511 NE 31st
Oklahoma City OK 73105

2-D returns will be reviewed for both form format and integrity of the barcode. Approvals or request for changes will be forwarded to the developer via email within 10 business days from receipt whenever possible.

Contact Information:

If you have any questions regarding the guidelines, testing or approval process please contact:

Ginger Hulsey
Barcode Coordinator
405-522-2981 or email at ghulsey@tax.ok.gov

or

Steve Mixon
IT Manager
405-521-2054 or email at smixon@tax.ok.gov

Thank you for supporting Oklahoma 2-D processing.

These 2-D specifications follow the 2-D Standards document prescribed by FTA and the guidelines prescribed by the NACTP to the best of our ability