STATE OF HAWAII
DEPARTMENT OF TAXATION

General Information and Scannable Specifications for Schedule CR (Rev. 2015)

Contact Information

Hawaii Department of Taxation
Technical Section
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tax.hawaii.gov/vendor/

Note: Reproductions must meet requirements as established in our current Forms Reproduction Policy and within this document.

Schedule CR (Rev. 2015)

General Information and Scannable Specifications

This document provides software vendors with the requirements for reproducing Schedule CR. Schedule CR is designed for electronic scanning that permits faster processing with fewer errors. Software developers who reproduce, develop, or distribute Schedule CR must create the form so the variable data (specified fields containing taxpayer information) are printed in a fixed format that can be read by the Department's IBML scanners.

Substitute scannable forms MUST meet requirements as established in this document and our Forms Reproduction Policy and be approved prior to release or distribution.

GENERAL INFORMATION

1. Substitute Form

- Substitute scannable forms must be created according to Department specifications and be approved prior to release or distribution.
- All forms and variable data must have a high standard of legibility for printing.
- Photocopies of the scannable form must not be submitted to the Department for processing.

2. Paper and Ink

- The paper size is 8.5 inches by 11 inches, the same size as the Department's original form. The paper weight must be at least 20 pound white bond and the page orientation is portrait.
- Black ink should be used in printing the text on the form and the variable data.

3. Variable Data

- All variable data fields must utilize 12 pt Courier font, and all variable text data must be in uppercase letters. Text labels must not touch variable data.
- All variable data fields require exact placement.
- Use a bold X (**X**) as a checkbox indicator. See exhibit for exact placement. The use of a checkmark is not acceptable.

4. Variable Data Delimiters

- Tax Year Beginning and Tax Year Ending must be printed with spaces between the dash (-) delimiter. For example:
  MM - DD - YYYY
  (2 digits for month, followed by a space, followed by a dash (-), followed by a space, followed by 2 digits for day, followed by a space, followed by a dash (-), followed by a space, followed by 4 digits for the tax year ending).

5. Dollar Amounts 123456789

- Do not use commas as thousand separators.
- Amounts are right justified.
- Amounts must be rounded. Dollar and cent signs should not be used when the field is rounded to whole dollars.
- A horizontal line must be present below the dollar amounts and must be 1 point thick. The placement of the horizontal line must not touch the dollar amounts.

6. Testing and Approval of the Scannable Form

- The printed 6x10 grid of the form on acetate overlays will be mailed to software vendors listed on our Hawaii software vendor website at **tax.hawaii.gov/vendor/**
  If you have not received the overlays, please contact the Forms Coordinator. This should assist in the exact data field placement. Verify your test data filled facsimile samples with the overlays prior to submitting them for testing. If the samples do not match the overlays within 1/16", do not submit them for approval as they will be rejected.
- A minimum of 5 hardcopy test samples must be provided to ensure proper testing including 1 hardcopy test sample that contains all maximized fields (one alpha "X" or numeric "9" character space with no leading or tailing spaces).
- Test samples must be originals. Photocopies, fax submissions, etc. will not be accepted.
- Test samples must be populated with unique sample variable data showing different scenarios.
- It will require 1 to 2 weeks, upon receipt by the Department, to verify the accuracy of the submitted samples.
- Approval of the facsimile must be obtained from the Department **prior** to filing.
- Schedule CR (Rev. 2015) cannot be filed until 2016.

SCANNABLE SPECIFICATIONS

1. Layout

- The form was designed on a 6x10 grid. See exhibits.
- Open space around variable data fields should be adhered to as much as possible except for the areas that do not require optical character recognition. Do not place any additional information in these areas.

2. Hawaii Vendor I.D. Number

- Print your 2-digit Hawaii Vendor I.D. Number following the "ID NO" label at the following positions:
  Pages 1 and 2, on row 63 at columns 53 and 54.
- See our Hawaii software vendor website for your Hawaii Vendor I.D. Number. If your company is not listed, please contact the Forms Coordinator.

3. Registration Marks

- Registration marks are required on every page. The scanning equipment looks for "L's", or registration marks, printed on the form. Exact placement of the registration marks are required.
- The vertical and horizontal edges of the registration marks must be the same length of .5 inch long and .0278 inch thick.
- There are **two** registration marks on each page.
  1. The top right registration mark should extend from the beginning of column 76 to the end of column 80 and should rest at:
     Page 1, the top of row 16;
     Page 2, the top of row 11.

  2. The bottom left registration mark should start at the beginning of column 6 and extend through the end of column 10 and rest on the top of row 64 for Pages 1 and 2.

- The tolerance is 1mm (¼ of a grid).
- No data or other stray marks are allowed to encroach within the white space in a .5 inch square of the registration mark.

4. Barcode

- A 1D barcode is specific to the form. The property of the 1D symbology barcode uses 3 of 9 (Code 39).
- Placement of the barcode is as follows:
  Pages 1 and 2, approximately at the top of row 4 and at the beginning of column 6;
- Height of the barcode is .5 inch.
- Length of the barcode is approximately 2 inches.
- Density of narrow bar width is set to 20 mils with resolution set to 300 dpi.
- Narrow to Wide Ratio is set to 2.
- A ¼ inch minimum clearance (blank space) must surround the barcode with the exception of the text required to be printed underneath the barcode.
- DO NOT stretch the barcode image.
- The required barcode is YBT151 for page 1:

YBT151

- The required barcode is YBT152 for page 2:

YBT152

  The barcode includes the form number code (YB), type of form (T), form year (15), and page number (1) or (2). There are no hyphens.
- Use of the Department of Taxation's JPEG file of the barcode is preferable. The JPEG files can be found at our software vendor website.
- DO NOT use Windows Metafile Format (wmf). This format causes a very low read rate by the Department's IBML scanners.

5. Acetate overlays

- Acetate overlays will be mailed to vendors listed on our Hawaii software vendor website who previously reproduced Schedule CR. If you are now reproducing Schedule CR, contact the Forms Coordinator for the acetate overlays. If your company is not listed and you are reproducing Schedule CR, please contact the Forms Coordinator.

YBT151

Schedule CR
(Rev. 2015)

STATE OF HAWAII—DEPARTMENT OF TAXATION

SCHEDULE OF TAX CREDITS

TAX YEAR 2015

or other tax year beginning 12 - 12 - 1212 and ending 12 - 12 - 1212

Name(s) as shown on return: NAME(S) AS SHOWN ON RETURNXXXXXXXXXXXXXXXXXXXXXXXX

SSN(s) or Federal Employer I.D. No.: 123-45-6789 123-45-6789

Attach this schedule directly behind Form N-11, N-15, N-30, or N-70NP

PART I Nonrefundable Tax Credits

1	Income tax paid to another state or foreign country (N-11, N-15, & N-70NP filers) (Attach copy of tax return(s) from other state(s) or federal Form(s) 1116. See tax return instruction booklet for more information.)	1	123456789
2	Carryover of the Energy Conservation Tax Credit (attach Form N-323)	2	123456789
3	Enterprise Zone Tax Credit (attach Form N-756)	3	123456798
4	Low-Income Housing Tax Credit (attach Form N-586)	4	123456789
5	Credit for Employment of Vocational Rehabilitation Referrals (attach Form N-884)	5	123456789
6	High Technology Business Investment Tax Credit (attach Form N-318)	6	123456789
7	Carryover of the Individual Development Account Contribution Tax Credit (attach Form N-323)	7	123456789
8	Carryover of the Technology Infrastructure Renovation Tax Credit (attach Form N-323)	8	123456789
9	Credit for School Repair and Maintenance (attach Form N-330)	9	123456789
10	Carryover of the Hotel Construction and Remodeling Tax Credit (attach Form N-323)	10	123456789
11	Carryover of the Residential Construction and Remodeling Tax Credit (attach Form N-323)	11	123456789
12	Carryover of the Renewable Energy Technologies Income Tax Credit (For Systems Installed and Placed in Service Before July 1, 2009) (attach Form N-323)	12	123456789
13	Renewable Energy Technologies Income Tax Credit (For Systems Installed and Placed in Service on or After July 1, 2009) (attach Form N-342) Place an X in the appropriate box to indicate the type of energy system installed and placed in service: • X Solar • X Wind	13	123456789
14	Capital Infrastructure Tax Credit (attach Form N-348)	14	123456789
15	**Total Nonrefundable Credits.** Add lines 1 through 14. Enter here and on Form N-11, line 35; N-15, line 52; N-30, line 14; or N-70NP, line 20. *Attach this schedule directly behind your Form N-11, N-15, N-30, or N-70NP.*	15	123456789

ID NO 12

YBT152

Name(s) as shown on return: NAME(S) AS SHOWN ON RETURNXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX

SSN(s) or Federal Employer I.D. No.: 123-45-6789 123-45-6789

PART II Refundable Tax Credits

16 Capital Goods Excise Tax Credit (attach Form N-312) **16** 123456789

17 Fuel Tax Credit for Commercial Fishers (attach Form N-163) **17** 123456789

18 Ethanol Facility Tax Credit (attach Form N-324) **18** 123456789

19 Motion Picture, Digital Media, and Film Production Income Tax Credit (attach Form N-340) **19** 123456789

20 Renewable Energy Technologies Income Tax Credit (For Systems Installed and Placed in Service on or After July 1, 2009) (attach Form N-342)
Place an X in the appropriate box to indicate the type of energy system installed and placed in service:
• X Solar • X Wind **20** 123456789

21 Important Agricultural Land Qualified Agricultural Cost Tax Credit (attach Form N-344) **21** 123456789

22 Tax Credit for Research Activities (attach Form N-346) **22** 123456789

23 Other refundable credits

a. Pro rata share of taxes withheld and paid by a partnership, estate, trust, or S corporation on the sale of Hawaii real property interests **23a** 123456789

b. Credit From a Regulated Investment Company **23b** 123456789

c. Add lines 23a and 23b **23c** 123456789

24 **Total Refundable Credits**. Add lines 16 through 22 and line 23c. Enter here and on Form N-11, line 32; N-15, line 49; N-30, line 12; or N-70NP, line 18. *Attach this schedule directly behind your Form N-11, N-15, N-30, or N-70NP.* **24** 123456789

ID NO 12

YBT151

Schedule CR
(Rev. 2015)

STATE OF HAWAII—DEPARTMENT OF TAXATION

SCHEDULE OF TAX CREDITS

TAX YEAR 2015

or other tax year beginning 12 - 12 - 1212 **and ending** 12 - 12 - 1212

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