

Specifications and Approval Procedures for the Reproduction of the New Mexico Fuel Reports (RPD-41306 and RPD-41308)

Before you begin reproducing New Mexico tax forms, please read the *General Specifications and Approval Procedures for the Reproduction of New Mexico State Tax Forms*. The document can be found on our web site at www.tax.newmexico.gov, click on “Forms and Publications”, then “Forms” and select “Software Developers”.

Form vendors and software developers who propose to reproduce, develop, distribute and/or use New Mexico tax forms must receive approval to generate any *substitute*¹ New Mexico state tax form. A substitute form must meet the requirements of the New Mexico Taxation and Revenue Department (TRD) and must be approved prior to release or distribution. TRD reserves the right to reject substitute forms with poor legibility or forms that do not meet the Department’s requirements.

Once approved, additional approvals are not needed until a new version of the form is released. Software developers and form vendors are responsible for ensuring that they are using the most current version of the form, instructions and specifications.

This, the *Combined Fuel Report* (RPD-41306) and the *Fuel Retailer Report* (RPD-41308) *Form Specifications and Approval Procedures* document describes the layout and form design features and the approval and testing procedures. There are separate *Form Design Images* for each form, and they are provided under separate covers to show how the RPD-41306 and RPD-41308 forms should look when printed by your software or product. You will need this *Form Specifications and Approval Procedures* document and each of the *Form Design Images* to develop the *Combined Fuel Tax Report* (RPD-41306) and the *Fuel Retailer Report* (RPD-41308).

The *Form Design Images* identify the placement of the vendor code, 3 of 9 barcode, the form text and the variable data. Variable data must be placed within the area specified on the *Form Design Images*. Red boxes and red text may be displayed on the images to indicate where to place certain design features. Do not print the grid, red boxes or red text on your report forms.

The 3 of 9 barcode, variable data, and form text must be within the area specified on the *Form Design Images*. In addition to the placement of the variable data, the *Form Design Images* also define the type of characters allowed within a field; any special characters required or excluded within a field; how a field should appear on paper, and the maximum field length.

You will be provided *Form Design Images* with and without a grid. The grid is used to help guide placement of the information on the page. The non-grid form is available to show you what the final forms should look like.

¹ A substitute report is any form produced and made available by any entity other than TRD.

Reminder: Do not print the grid, red boxes or red text on software vendor report forms.

DESIGN FEATURES

VENDOR CODE

The vendor code is a four-digit code identifying the Software Developer whose application produced the report. The National Association of Computerized Tax Processors (NACTP) assigns vendor codes. If you do not have a NACTP Vendor Code, contact Rose Romero at (505) 827-2481 for more information. Your code must be placed within the area specified on the design image. Should a second company be responsible for creating the variable data, their four-digit vendor code may be placed immediately to the right of the first vendor code. The vendor responsible for the creation of the 3 of 9 barcode will place its vendor code within the barcode data.

3 OF 9 BARCODE

The 3 of 9 barcodes are placed in the upper right-hand corners of Forms RPD-41306 and RPD-41308 within the area depicted on the *Form Design Images*. There are no 3 of 9 barcodes on the second pages or the associated schedules.

The following requirements for barcodes must be followed exactly:

Placement: Rows 4, 5, 6, 7 and 8, columns 50-76.

Recommended height is 2/3-inch.

Height-to-Length Ratio 1:4

Narrow-Element Width

The minimum narrow-element width is 0.5mm.

The maximum narrow-element width is 1.25mm.

Wide-Element Width

The minimum wide-element width is 1 mm.

The maximum wide-element width is 2.5 mm.

Wide-to-Narrow Ratio

The minimum wide-to-narrow ratio is 2.25:1.

The maximum wide-to-narrow ratio is 3:1.

Inter-character Gap must be greater than the size of the narrow element, but no greater than 2.5 times the size of the narrow element. A quarter-inch "quiet zone" in which there is no printing at all must be preserved to the left and right. The 3 of 9 barcode is a 9 digit number that identifies the report and your vendor code. If a second company is responsible for creating the variable data, DO NOT include their four-digit vendor code in the 3 of 9 barcode. This table identifies the barcode report number with 9999 representing your vendor code.

Table 1

Report #	Form #	Display ²	Value
RPD-41306	9654		96549999
RPD-41308	9657		96579999

FORM TEXT

The text on your form must be printed verbatim and placement must be exactly positioned within the area specified on the *Form Design Images*. The font type and font size must be similar to the font used on the *Form Design Images*. Abbreviations may be used, provided they follow the Tax Form Design Standards and Guidelines set by the NACTP. The guidelines and standards document can be found on the NACTP web page at www.nactp.org.

VARIABLE DATA³

The field descriptions include the following descriptors to describe what type of characters may be included (or excluded) and the layout of the data required within a field. **Variable data requires exact placement.**

Variable “9” – Represents a numeric character (0 through 9) within a field.

Monetary fields – When the character “9” is found within a **monetary field**, you must right adjust the numbers; do not pre-fill with zeros; do not include special characters, other than a decimal and a comma before every third left-most digit within the monetary amount. For example, the field definition for a monetary field typically appears as “999,999,999”. If the amount to be entered in the field is \$89,500.00, enter the number as “89,500”. If no entry is required, leave the field blank.

Date fields – Each field will indicate the format of the date to be placed in the field. The format will contain the following indicators M = Month, D = Day, C = Century, Y = Year. If no entry is required, leave the field blank.

Variable “X” – Represents an alpha/numeric field. Characters may be A through Z (upper case only), 0 through 9 and the special characters ampersand (&), space (), comma (,), hyphen (-), period (.). No other character is allowed within the field. Generally, the field is left justified.

Maximum field length – The maximum number of characters within a field is identified on the Form Design Images. You may not exceed the number of characters shown on the image for any specific field. The total characters include any required characters, such as commas and a decimal point within a monetary sum.

² Size ratios of barcodes in this table are not to specifications.

³ “Variable Data” is taxpayer specific information.

APPROVAL/TESTING PROCEDURES FOR RPD-41306 AND RPD-41308

Software developers and form vendors who create any of the Fuel Report Forms **cannot** choose to create an electronically completed substitute report form without a 3 of 9 barcode (non-scannable) when required.

Once approved, these continuous use scannable forms require Department approval only upon revision. Scannable substitute forms cannot be submitted after January 25th or before May 28th. The Department cannot test the scannable features of the forms during this time.

To obtain approval of scannable forms, submit a cover letter that includes contact information, an e-mail address, your vendor code, and a list of the submitted report forms. Each test packet should include, one set of blank forms, one set with "full-field filled"⁴ variable data, and one set of report forms completed with sample⁵ variable data printed on the report forms.

3 OF 9 BARCODE TESTING

Complete testing will include the readability of the barcode. Refer to Table 1 for the data required within the 3 of 9 barcode for testing.

Scannable test packets must be mailed to:

New Mexico Taxation and Revenue Department
Revenue Processing Division
Attention: Rose Romero
Manuel Lujan Sr. Building
1200 S. St. Francis Drive
Santa Fe, NM 87505

For more information contact Rose Romero by phone (505) 827-2481, fax (505) 827-2505, or e-mail address rose.romero@state.nm.us, or Gale Kessler by phone (505) 827-1746, fax (505) 827-2505, or e-mail address gale.kessler@state.nm.us.

FORMS WILL BE APPROVED ONLY WHEN:

- The form is legible and scannable;
- the appearance of the form conforms **exactly** to the specifications;
- all form text and variable fields are within the areas specified on the design image; and
- the vendor code is included when required on the form.

Allow ten days upon receipt by the Department for a response to the first submission of a form.

⁴ "Full-field filled" is a form with a character filling all possible locations and positions for variable data, i.e., "9" for numeric and "X" for alpha/numeric values.

⁵ TRD publishes test scenarios for personal income tax only. You must create your own test scenarios.

The Department does not review or approve the logic of specific software programs, nor does the Department confirm the calculations on the forms produced by these programs. The accuracy of the program remains the responsibility of the software developer, distributor or user. However, if the form is approved but a scannable feature on the form fails to follow the published specifications for the scannable feature, then the Department may rescind the approval of the software developer's forms. An example would be if a 3 of 9 barcode on the form contains an incorrect form identification number. Willful noncompliance with the Department's requirements could result in the rescinding of a software developer's forms approval.

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