Instructions for the 2026 Electronic Data Interchange (EDI) Response Form for North Carolina Department of Revenue

The target date to begin Software Developer (SWD) testing is August 3, 2026* with a defined ending date of December 31, 2026. This form must be completed annually prior to your participation in the North Carolina Sales and Use tax EDI return electronic file program. After the Response Form has been received and the test cases and the technical specifications have been posted to NCDOR's website, you may begin testing. Once your software has passed our testing process, you will receive an acceptance letter via email. You will be asked to include the verbiage that you would like to have posted to our website at that time.

NOTE: (*) Indicates that the date is estimated and is subject to change at any time.

The deadline for the Response Form is December 1, 2026. If you have any questions, please send an email to **EDI_SAU@ncdor.gov** or you may call us at 919-814-1500.

1. Complete the **Response Form** in its entirety. This response form is ***for eSPVS only.***
2. A separate response form must be submitted for each software product.

Electronic Data Interchange (EDI) Filing
Sales and Use Tax
Guidelines and Instructions

The North Carolina Department of Revenue (NCDOR) test software products annually for the remittance of Sales and Use Tax returns that use the Electronic Data Interchange (EDI) file format. Prior to submitting any returns to the Department, the software product files must be tested to ensure the file layouts adhere to the Department's EDI file layout that is outlined in the EDI Technical Specifications document.

Testing Guidelines

All test submissions will be reviewed and evaluated during the months of August through December. Any software product seeking approval outside of this testing window will have to wait until the next filing season updates.

The eSPVS Unit will notify all software developers that tested previously with NCDOR that the Response Form is available. The forms should be completed and sent back to the eSPVS Unit via email or fax.

Once the eSPVS Unit receives the response form, the lead tester will notify the EDI Testing Contact when they can begin to submit their test cases. If you have never completed EDI testing with the Department, you must submit the EDI Response form prior to submitting any test cases.

Please ensure the Response Form is completed in its entirety and the deadline to submit the form is **December 1, 2026**. Please email the completed form to **EDI_SAU@ncdor.gov**.

Contact Information

If you need assistance during the testing process, please contact the eSPVS Unit via email at **EDI_SAU@ncdor.gov** or you may call us at (919) 814-1500.

Electronic Data Interchange (EDI) Filing
Sales and Use Tax
2026 Tax Year Response Form

Deadline to Submit Form: December 1, 2026

Date: _____

This form must be completed annually prior to your participation in the North Carolina Sales and Use tax EDI return electronic filing program.

It is very important that you provide the requested information below about your company to ensure you receive all future communications regarding EDI and/or testing.

After successfully completing your testing with the Department, please provide the verbiage you would like to be included in our published list of approved North Carolina EDI software developers no later than thirty (30) days from the date on your approval letter.

Part One

A. *Software Developer General and Contact Information*

Company Name: _____

Mailing Address: _____

City: _____State: _____ Zip Code: _____

CEO/President Name: _____

CEO/President Email: _____Telephone: _____

EDI Contact Name: _____Telephone: _____
EDI Contact Email: _____Fax: _____

Testing Contact Email: _____Telephone: _____

B. Software Product Information

EDI Sales Tax Preparation Product Name: _____

Do you develop an online filing product?
Yes_____ No_____ If yes, product name: _____

Do you develop an online filing product only? (No tax preparation software)
Yes_____ No_____

Does another developer transmit through your company and/or do you develop software for another company?
Yes_____ No_____ If yes, specify: _____

Part Two

As an authorized representative of _____, I agree on behalf of our company that we will comply with NCDOR's standards and requirements listed below.

- Notify the Department, customers, and clients immediately if computation errors or other variable data errors are found. Indicate to the Department how and when the errors will be corrected within 3 business days of discovery. Contact the eSPVS Unit via email at **EDI_SAU@ncdor.gov** for any EDI related errors and/or issues.

- Correct errors and provide the Department with satisfactory evidence, within seven (7) business days of discovery, that the company has corrected the errors and has notified customers and clients of the corrections.

- Software developers who do not comply with this requirement are subject to having their approval revoked and product removed from the Department's website for public viewing for a reasonable period of time. This period of time will be at the discretion of the Department of Revenue. Once revoked, the Department will no longer accept any returns filed electronically using the software product until the developer becomes compliant.

- The Department has the discretion to request a copy of your company's software, if deemed necessary. If requested, a copy of the software or the URL must be submitted within five (5) business days from the date of request. The software or URL will be used for researching computation errors or other variable data errors based on taxpayers inquiries. Under no circumstances will the software or URL be used by the Department to prepare or submit tax returns for processing. The Department has put reasonable security measures in place in an effort to prohibit unauthorized access and improper or illegal usage of your software product or URL by Departmental employees.

Part Three

Signature

☐ I acknowledge that all test data submitted during the approval process are created in and originate from the actual software.

☐ I acknowledge that all electronic returns received by North Carolina Department of Revenue generated from this software will be filed from the initially approved product version, or a subsequent product update.

As the representative of the above named organization, I agree, on behalf of the organization, to comply with all requirements listed above. Furthermore, by signing this agreement, my organization is agreeing to all of the requirements listed above. The North Carolina Department of Revenue reserves the right to revoke and remove software product listings from our website and thereby refuse to accept any additional returns or forms from a company that does not adhere to the above stated requirements.

As an approved North Carolina Department of Revenue provider, I agree to provide true, accurate, current, and complete information about my company. I understand that if I provide any information that is untrue, inaccurate, obsolete, or incomplete, the North Carolina Department of Revenue has the right to deny or suspend the acceptance of the returns.

(Authorized Representative) Printed Name	Email Address	
(Authorized Representative) Signature	Date	Phone Number