Automated Tax Credit Applications

Instructions for Applicant

Preliminary application can be accessed here:

https://partnerportal.commerce.nd.gov/PublicForms/Form.aspx?id=1013fad3-6b3c-ea11-8101-0050568adb94

Please complete all fields and eSign at the bottom.
Taxpayer Information

Applicant (Company) Name *
Test Company

Federal Identification Number/SSN *
12-3456789

Primary Contact First Name *
John

Primary Contact Last Name *
Doe

Telephone Number *
701-555-55

Physical Location (Street Address) of ND Facility *
123 Main Street

Physical City *
Bismarck

Physical State
ND

Physical Zip Code
58501

Is the Mailing Address the Same as the Physical Address?
- Yes
- No
Mailing Address

Mailing City

Mailing State

Mailing Zip Code

Website

www.test.com

Email Address *

doe@gmail.com

Business Information

Primary Sector Certification

Is this Business Primary Sector Certified?

☐ Yes

☐ No
Applicant will receive an email confirmation of receipt of application.

Applicant will then receive an email with a link and access code to the Partner Portal to create a login to continue and complete the application – including all tax credit purchases with invoice line items and documentation/receipts.
Select Automated Tax Credit icon to complete the application.

Click on the Automate Tax Credit Record to complete the application by adding Tax Credit Purchases and Invoice Line Items.
Scroll down to the Supplement A section to enter the Tax Credit Purchases. Click Add to enter the Tax Credit Purchase information.

Complete the fields as required.

Once saved, the screen will refresh and you will be returned to the main application page. Continue adding Tax Credit Purchase records OR add any Component Invoice Line Items that relate to the Tax Credit Purchase.

To add an Invoice Line Item, open the Tax Credit Purchase record by clicking on the red name of the record:

You will notice the Tax Credit Purchase screen has added an Invoice Line Items section.
Add Invoice Line Item records as needed to complete the Tax Credit Purchase.
You will need to save the record before you can attach notes. **MAKE SURE YOU SAVE THE INVOICE LINE ITEM RECORD OR THE RECORD WILL NOT BE CREATED!**

Once the record is saved, you will have the opportunity to upload receipts and documentation for the Invoice Line Item.

To attach receipts/documentation, click the Add Note button in the newly formed Notes section. At the bottom of the open window will be an Attach File: Choose Files button. Click the Choose Files button to select your files, upload your receipt images here and press Add Note to save the attachment. You can then Save the Invoice Line Item and continue or you can add additional attachments to the Line Item.
Continue this process until all Tax Credit Purchases, Invoice Line Items and supporting documentation is complete.

Check the box that states:

I have included all documentation and this is my final submission.

☐ Final Submission

Save the application for the review process to begin.

Applicant can keep updated as to the status of the application on the portal.