**PA** **pennsylvania**
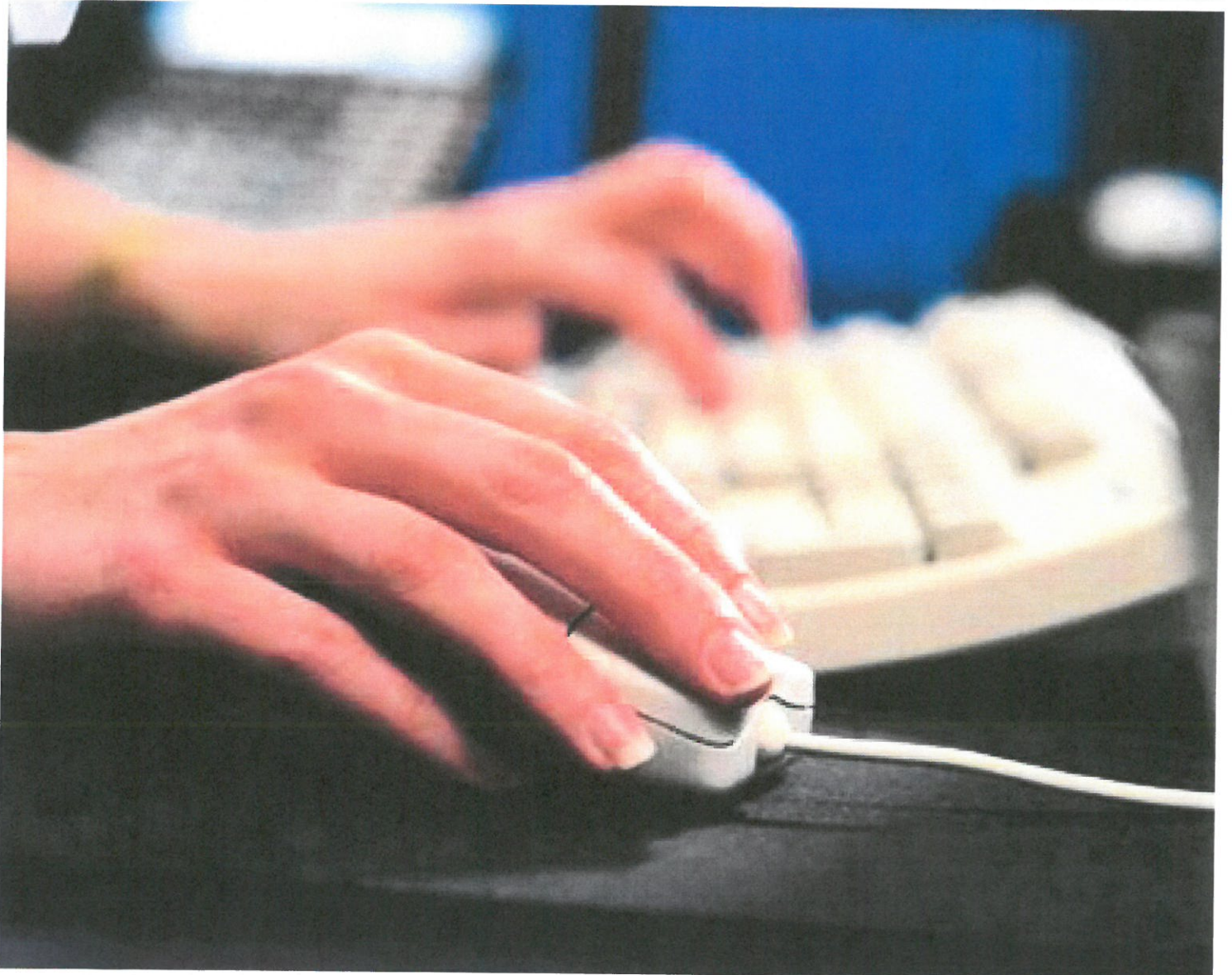DEPARTMENT OF COMMUNITY
& ECONOMIC DEVELOPMENT

# Educational Improvement Tax Credit (EITC) and Opportunity Scholarship Tax Credit (OSTC) Programs

## *Desktop Guide*

*How to Apply Using DCED'S Electronic Single Application*

# Table of Contents

DCED Customer Service Desk 1-800-379-7448

# Introduction

Applicants can access the electronic single application several ways from DCED's website **www.newPA.com**. The fastest way to access the application is by clicking the Single Application link located in the top right corner of the home page. However, applicants can also access the application by clicking on the Funding & Programs link or from the Educational Improvement Tax Credit or the Opportunity Scholarship Tax Credit pages.

If you have a problem at any time during the application process, please contact DCED Customer Service at 1-800-379-7448.



This link will take you directly to the Single Application Web page.

Information on all DCED Programs and How to Apply can be found by clicking this button.

The Single Application page provides general information about the application.

## Single Application

**Eligible applicants must apply for funding through DCED's Single Application for Assistance**

**What is the Single Application?**

The Single Application for Assistance allows the applicant to apply for various programs using one form while capturing specific program information needed to evaluate the project for possible funding. The application is designed to help applicants comprehend the program requirements up front and expedite the review process.

**How To Apply**

After downloading and reading a program's guidelines, you can apply through the Single Application.

Apply.

Navigation: Business | Community | Local Government | Funding & Programs

Inside This Section:
- Search for Programs & Funding
- Apply for Programs & Funding
- Program Funding Types
- Investment Tracker
- Archived Programs
- View Your Organizations

Information about the Single Application is available on the Single Application page. Click on the **Single Application for Assistance** link or the **Apply** link in the How to Apply box to go to the login page.

The **Apply** link can also be found on the Funding & Programs page and the EITC and OSTC program pages in the How to Apply box.

# One-time Registration & Login

All applicants **must** complete a two-step, **one-time** registration process. If you already have a user name and password, you can use this information to log in to the application. However, if you are a first-time user, you must complete the one-time registration process.

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## Login

**What's New?**
For an overview of the changes in the new Single Application  please read Help

User Name

Password

LOGIN

Important Note: If you registered in the old Single Application, you should not Register again. Please login with your current User Name and Password to update your Account Information.

REGISTER
(First Time User? Click the button above)

FORGOT PASSWORD
(Forgot Your Password? Click the button above)

**Enter User Name and Password.**

**If you are a first-time user, you must complete the two-step, one-time registration which includes setting up the user name and password, and your Single Application information. See the following pages for details.**

*Reminder: Always keep your user name and password in a safe place.*

# PA Login Information

Creating a user name and password is the first step in completing the DCED Electronic Single Application. This information is connected to the PA Power Port registration system, which allows you to have one user name and password for any applications across commonwealth agencies that use the PA Power Port login. While DCED captures this information in its application, you must log in to the PA Power Port website at www.login.state.pa.us/login if you need to make changes to the information or forget the password.



**USER NAME** – must be a unique user name. If the user name you are trying to use already exists, please select another.

**PASSWORD** – it is case sensitive and requires a minimum of 8 characters that must include one of each of the following: uppercase letter, lowercase letter, number and symbol.

**SECURITY QUESTIONS/ANSWER** protects the identity of the account. The security answer is case sensitive.

**PLEASE SELECT FOR PROFIT** – This information will be used to accurately determine programs in which you would be an eligible applicant. See following page for details.

*All fields marked with a red diamond are required.*

# Single Application Information

The second step of the registration process is your Single Application Account Information. To accurately determine what DCED programs you will be eligible for, you need to tell us if you are applying on behalf of a for-profit, non-profit or government entity. This information becomes your "User Settings" and should only be changed if necessary. An option to automatically populate the Applicant Information section with this information is available. Any required changes to this information can be done in the application by clicking "User Settings" in the red menu bar.

The next screen will differ depending on which type of entity you've selected. In this case, we will use a "For Profit" business. Remember—only fields marked with a red diamond are required.

> **Apply as a For Profit business to display EITC and OSTC program buttons.**

**Singly Application Information**

| | |
|---|---|
| | ☐ Reset |
| Are You Applying As? | ⦿ For Profit  ☐ Non Profit  ☐ Government  ☐ Other |
| Company/Entity Type | ☐ Limited Liability Partnership    ☐ Partnership ◆ |
| | ☐ Sole Proprietorship    ☐ Limited Liability Corporation |
| | ☐ S Corporation    ☐ C Corporation |
| Federal Employers Identification Number (FEIN) Or SSN | [          ] ◆ |
| | Vendor Registration To apply for a SAP Vendor Number please click the link |
| SAP Vendor # | [          ] |
| | (xxxxxx or xxxxxx-xxx) |
| | Department of State For information on how to register your business click the link |
| Incorporated in PA? | ☐ Yes |
| Registered to do business in PA? | ☐ Yes |
| Company/Entity Name | [          ] ◆ |
| CEO | [          ] ◆ |
| CEO Title | [          ] ◆ |
| Application Contact Name | [          ] |
| Title of the Contact person | [          ] |
| Phone | [          ] Ext [    ] |
| | (xxx-xxx-xxxx) |
| E-mail | [          ] |
| | (if different from above) |

**SUBMIT**

> **Application contact information is not a required field; however, if this information is added, it will populate into the application if you select that option on the applicant tab.**

# Create or Edit Application

Once you have successfully registered your user name and password, this page will appear each time you log on to the application. You have a choice to create a new application, edit an incomplete application, or delete an incomplete application. Once you create an application, you can exit and return to the application as many times as necessary to complete.

## Begin a New Application

**USER SETTINGS** – This is the information you entered into your Single Application Account Information. You can update this information as necessary by clicking on **User Settings**.

To apply for **EITC** or **OSTC** programs, click the appropriate program button. The buttons will only appear if you have your **User Settings** set up as a "For-Profit" business. To change the **User Settings**, click on **User Settings** in the red menu bar.

## Edit or Delete Incomplete Application

If you decide to exit the application prior to completion, it will be saved and displayed under **Incomplete Applications** on this page. You have the option to **Edit** the application or **Withdraw** the application.

Click **EDIT** to enter the incomplete application

Click **WITHDRAW** to delete an incomplete application

> Note: If you select Withdraw, the application is deleted.

# Application Menu Bars

Options to Save or Print the application appear on the blue menu bar. The application is saved as you move through the application. However, if you are stepping away from your computer for a period of time, please click on the **Save** button. You can print the application after selecting a program.
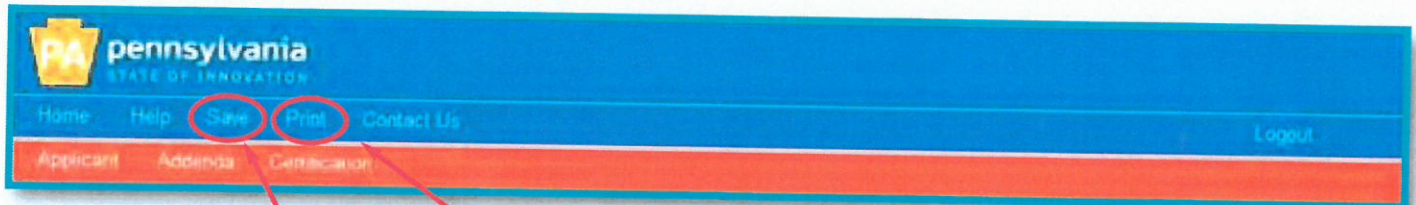


The option to Print the application is available after selecting a program.

The application saves information as you click from tab to tab; however, if you step away from your computer for a period of time, click **Save**.

# Applicant Tab

You can choose to populate the application by selecting the **Use Account Information** button. When selecting the button, the fields will fill with the information stored in **User Settings**. Two additional fields are required, **NAICS Code** and **Enterprise Type**. A dropdown box will be available to select the NAICS Code. The Enterprise Type requires a check box to be selected (see page 9.)



**Optional – To populate the application with the information you entered into your User Settings, click the USE ACCOUNT INFORMATION button.**

**NAICS Code – This field does not populate from User Settings. A dropdown box will help you to select the NAICS Code; continue to make selections until a 4-digit number appears in the box.**

# Enterprise Type

This field does **not** populate from User Settings. Please check all that apply.

## Enterprise Type

Indicate the types of enterprises that describe the organization listed above. You may select more than one type. *

- ☐ Advanced Technology
- ☐ Agri Processor
- ☐ Agri Producer
- ☐ Authority
- ☐ Biotechnology / Life Sciences
- ☐ Business Financial Services
- ☐ Call Center
- ☐ Child Care Center
- ☐ Commercial
- ☐ Community Dev. Provider
- ☐ Computer & Clerical Operations
- ☐ Defense Related
- ☐ Economic Dev. Provider
- ☐ Educational Facility
- ☐ Emergency Responder
- ☐ Exempt Facility
- ☐ Export Manufacturing
- ☐ Export Service
- ☐ Food Processing
- ☐ Government
- ☐ Healthcare
- ☐ Hospitality
- ☐ Industrial
- ☐ Manufacturing
- ☐ Mining
- ☐ Other
- ☐ Professional Services
- ☐ Recycling
- ☐ Regional & National Headquarters
- ☐ Research & Development
- ☐ Retail
- ☐ Social Services Provider
- ☐ Tourism Promotion
- ☐ Warehouse & Terminals

**Continue** – This will move you through the application page by page.

Continue

# Addenda Tab

The Addenda Tab is program-specific information required by the program office in accordance with the program guidelines. All items are required.



Select the County and Municipality based on where the business is located. Out-of-state companies should select statewide project.

The County and Municipality selections determine the Legislators that appear. If more than one selection is possible, you will need to select the Legislator.

The dropdown box for Question 4 will differ based upon the program selection. The program commitment selected and dollar amount donated (Question 5) will be used to calculate the tax credit amount.

## EITC Program Commitment Selections

## OSTC Program Commitment Selections

The calculated tax credit amount is displayed. This amount will be entered in the budget on the printed copy of the submitted application.

Enter whole dollar amount of donation.

Click **Calculate Tax Credit** – the calculated tax credit will display. If the program commitment or the donated amount is changed, click **Calculate Tax Credit** to recalculate the tax credit amount.

# Certification Tab

If all the fields marked with a red diamond are not satisfied, the application will provide the required sections and fields that are missing information. You will <u>not</u> be able to submit the application until all required information is completed.

# Submit Application

Once you have completed all required information, you are ready to submit the application. You <u>must</u> click the **"Submit Application"** button to send the application to DCED.

After clicking the **Submit Application** button, you will receive a confirmation page that includes the 12-digit Single Application number for tracking purposes. The option to print a copy of the completed application and signature page are available. You are required to mail the signed signature page to DCED.



Click the **Submit Application** button to electronically submit the application to DCED

# Successfully Submitted Application

The Application Certification page displays the 12-digit Single Application number, which is your confirmation that the application has been submitted to DCED. You have the option to print the signature page or the entire application.

The applicant cannot make changes to the application once it has been submitted to DCED. If changes are required, please contact DCED at 1-800-379-7448.
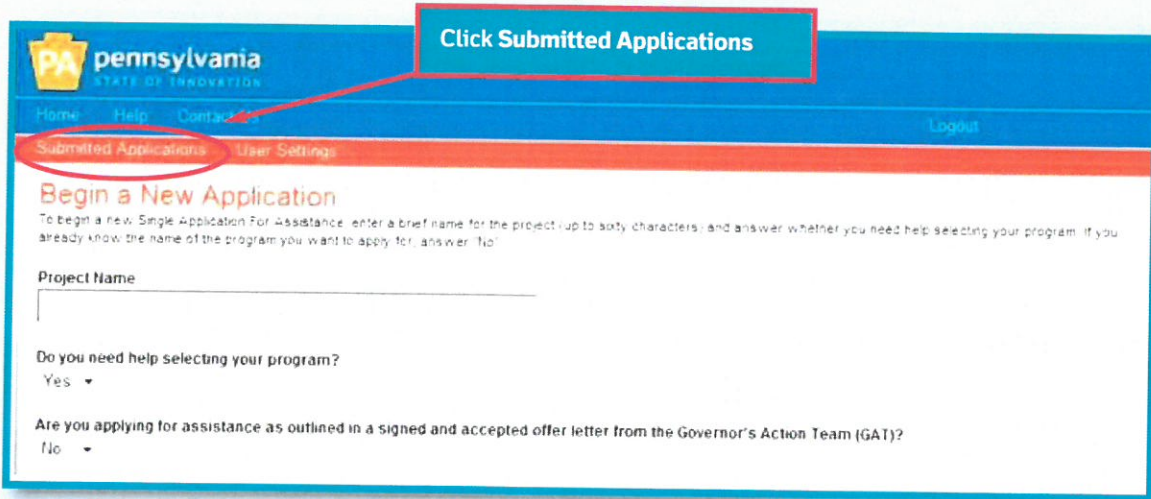


**Web ID # is displayed.**

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Certification

Applicant: EITC and OSTC Test Company                              Web Application #: 8030429
Program: Educational Improvement Tax Credit    Program Fact Sheet   Program Guidelines

## Application Certification

Single Application ID #: 201303189498

**The 12-digit Single Application number will be displayed.**

The web application has been successfully submitted to DCED for processing. It is necessary that you sign a copy of the signature page and mail it to DCED along with any paper supporting documents.

The signature page may also be printed now. You may also print submitted applications from the Home page. Click the link labeled "Submitted Applications" in the top toolbar.

Print Signature Page only

Print Entire Application with Signature Page

**Applicant has options to print the entire application or the signature page only. NOTE: The printed copy of the application for EITC and OSTC programs will contain additional information supplied by the program office.**

The signature page along with any paper supporting documents can be mailed to the following address:

Pennsylvania Department of Community and Economic Development
Commonwealth Keystone Building
Attn: Customer Service Center
400 North Street, 4th Floor
Harrisburg, PA 17120-0225

**Mail the signed signature page to the address shown.**

# View / Print Submitted Application

To view your submitted application, simply go to the home page and click on Submitted Applications in the red menu bar.



**Click Submitted Applications**

All successfully submitted applications will appear under **Submitted Applications.** You can search for the application by entering the web ID in the search field or by scrolling through the applications shown. To view the application, click on the **VIEW** button.



**Enter the web ID number or 12-digit Single Application Number into the search field and click SEARCH**

**Click VIEW button**

**The ID number is the web application number.**
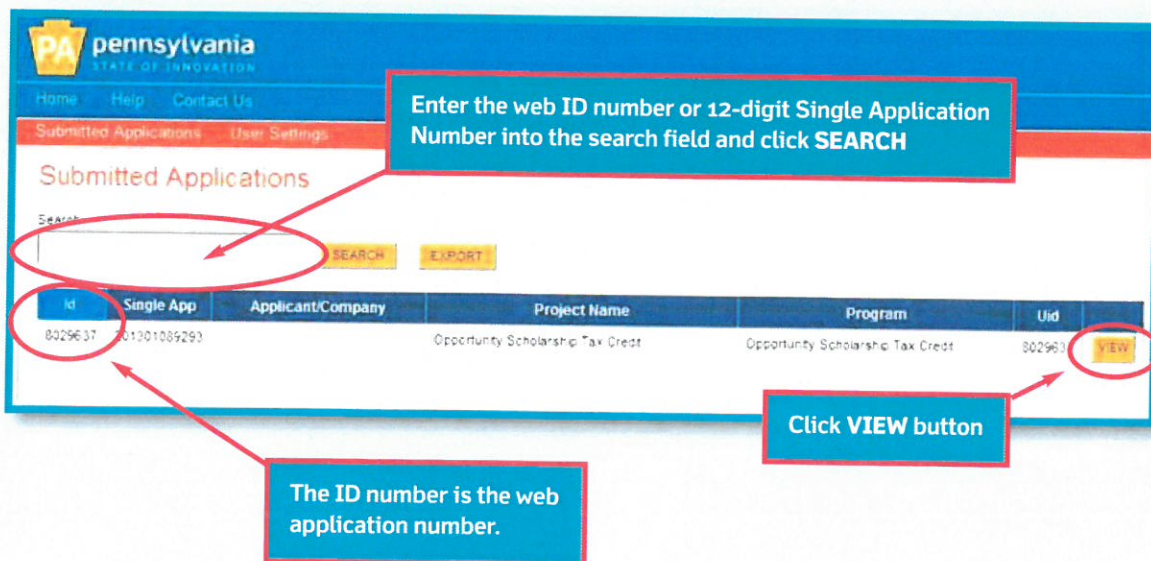
The submitted application will open to the **Application Certification**. Options to print the application and signature page are available.



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Certification

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*3/19/2013*