

HCTC Taxpayer Salesforce User Guide

Colorado Department of Local Affairs

Division of Housing

Homeless Contribution Tax Credit (HCTC) Portal



COLORADO
Department of Local Affairs
Division of Housing

Updated 07.06.2023

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Purpose

Salesforce is the software database that will be used to track contributions, tax credits, and certificates as well as manage eligibility verification forms for potentially qualifying organizations and projects.

Nonprofit organization's that are participating in the Homeless Contribution Tax Credit have the option to allow donors to submit their own contributions via Salesforce for a tax credit. This option may not be for every donor and information is distributed at the nonprofit staff's discretion.

If you have any questions regarding your donation, the organization, or formatting (if you are a previous HCTC recipient), please contact your nonprofit's point of contact for additional guidance before or during the contribution submission process.

Formatting and Style Guide

Anyone who will be using Salesforce to submit contributions must follow the [HCTC Formatting and Style Guide](#).

To ensure that the HCTC Program has accurate data within Salesforce, all of the entries for names, address, and related information must be standardized. Having accurate data helps to eliminate the possibility of duplicates for the individual donors within the database.

If you have received an HCTC certificate in the past, please reach out to the organization you received the certificate through to gather information on how your name, address, and contact information may already be formatted in the database.

How To's

How to Submit Contributions

All donations need to be made to the participating HCTC organization prior to submitting the information for a tax credit certificate in Salesforce. Nonprofit staff will review all donor-submitted contributions prior to distributing a tax credit certificate.

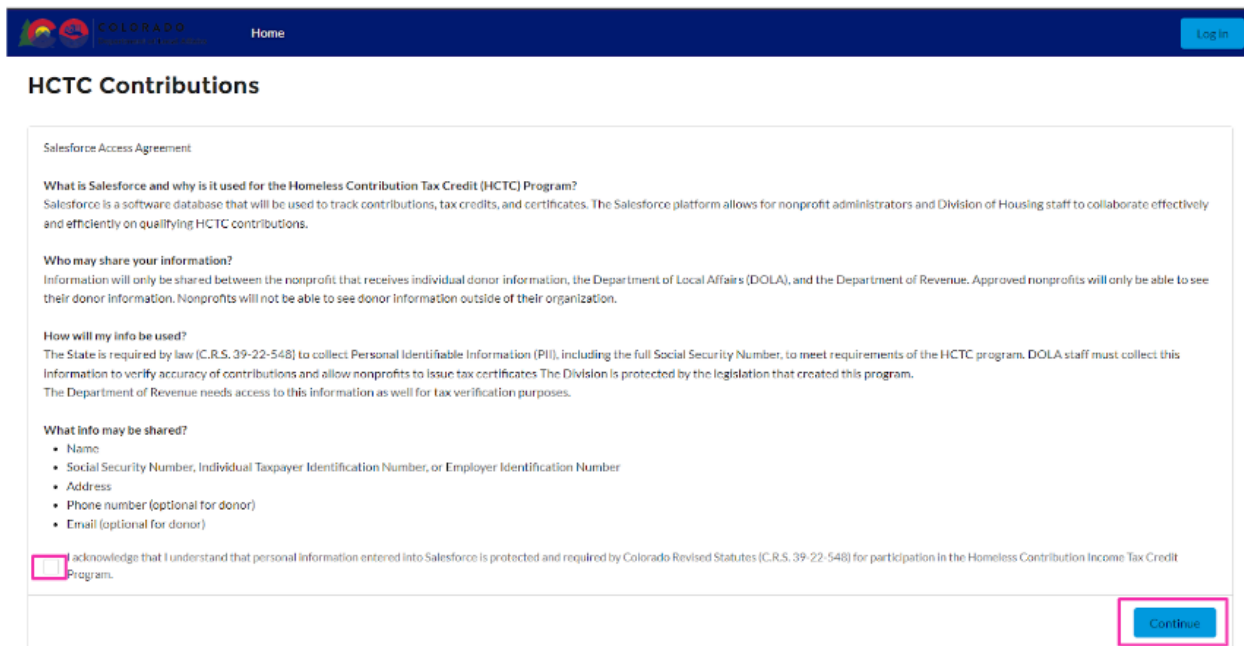


Screen 1: Salesforce Access Agreement

Review security information before entering the Salesforce platform. This information explains why the Division of Housing uses Salesforce for the Homeless Contribution Tax Credit Program and the measures that are in place to protect data privacy.

Once you have reviewed this page, select the acknowledgement **checkbox**.

Then, click **Next** to continue.



The screenshot shows the 'HCTC Contributions' page in the Salesforce interface. At the top, there is a navigation bar with the Colorado Department of Local Affairs logo, a 'Home' link, and a 'Log In' button. The main heading is 'HCTC Contributions'. Below this, the page is titled 'Salesforce Access Agreement'. It contains several sections of text explaining the use of Salesforce for the Homeless Contribution Tax Credit (HCTC) Program, including information on data privacy and the types of information shared. At the bottom, there is a checkbox for acknowledging the terms and a 'Continue' button.

What is Salesforce and why is it used for the Homeless Contribution Tax Credit (HCTC) Program?
Salesforce is a software database that will be used to track contributions, tax credits, and certificates. The Salesforce platform allows for nonprofit administrators and Division of Housing staff to collaborate effectively and efficiently on qualifying HCTC contributions.

Who may share your information?
Information will only be shared between the nonprofit that receives individual donor information, the Department of Local Affairs (DOLA), and the Department of Revenue. Approved nonprofits will only be able to see their donor information. Nonprofits will not be able to see donor information outside of their organization.

How will my info be used?
The State is required by law (C.R.S. 39-22-548) to collect Personal Identifiable Information (PII), including the full Social Security Number, to meet requirements of the HCTC program. DOLA staff must collect this information to verify accuracy of contributions and allow nonprofits to issue tax certificates. The Division is protected by the legislation that created this program. The Department of Revenue needs access to this information as well for tax verification purposes.

What info may be shared?

- Name
- Social Security Number, Individual Taxpayer Identification Number, or Employer Identification Number
- Address
- Phone number (optional for donor)
- Email (optional for donor)

☐ I acknowledge that I understand that personal information entered into Salesforce is protected and required by Colorado Revised Statutes (C.R.S. 39-22-548) for participation in the Homeless Contribution Income Tax Credit Program.

[Continue](#)

Screen 2: Formatting and Style Guide Training and Document

This screen provides links to a **Formatting and Style Guide Training Video**. This training provides further detail on the **Formatting and Style Guide Document**.

The Division of Housing provides this information prior to beginning to enter information into the Salesforce system so that donor's are as prepared as possible to enter complete and accurate information. If your information is entered incorrectly and printed on your tax credit certificate, your tax credit certificate may be rejected by the Colorado Department of Revenue if the tax credit certificate information submitted with your tax return cannot be verified.

Once you have reviewed the Formatting and Style Guide information, click **Next** to begin the contribution submission process.

HCTC Contributions

HCTC - Screen Flow - Contribution Form for Donors

Before entering your contribution, review these materials to help ensure that your entry is accurate:

Formatting & Style Guide Training Video: https://youtu.be/ZHu_SRGJwrl

Formatting and Style Guide Document: <https://docs.google.com/document/d/18Ck0E4DYpS43xX0Dw-gMHZaXDSNcVgB-l0IQHXDNfrY/edit?usp=sharing>

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Screen 3: Nonprofit Selection

Search for the **Nonprofit Organization Name** you have submitted your donation to. You will be able to search through the list of approved HCTC nonprofit’s as you type. Select the **Nonprofit**. Click **Next** to continue.

HCTC Contributions

Non-Profit Selection

Select the Non-Profit you have contributed to

* Search Non-Profit By Name

Complete this field.

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Screen 4: Project Selection

Each organization has approved Project Activities that qualify for HCTC. These may be the nonprofit’s Services OR a Capital Campaign. Only approved HCTC qualifying projects will appear on this screen.

Select the Project your donation is going towards on this screen. Then, click Next.

Please note: If you do not know which Project to select, please contact your nonprofit point of contact before proceeding. Nonprofit’s must keep accounting records of where the donations are attributed within their organization and for continued HCTC eligibility.

HCTC Contributions

Project Selection

Below you can find all projects associated with TestDOLA

Available Projects

Showing 3 of 3 items • 1 item selected

Project	Project Name
☐ Project-00018	Test Capital Campaign - Rural
☒ Project-00016	Test Outreach Program
☐ Project-00017	Test Shelter Capital Campaign

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Screen 5: Contributor Type

Select if you are making the donation as an **Individual, Business, or Foreign Business entity**.

Click **Next**.

HCTC Contributions

Individual or Business Contributor

* Available options

☒ Individual Household
 ☐ Business Entity
 ☐ Foreign Business Entity

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Screen 6a-1: Individual Household Entries - Name

For Individual Household entries, the **Taxpayer ID must be the taxpayer’s full Social Security Number or Individual Taxpayer Identification Number**.

The Social Security Number, address, and phone number must match the identity of the taxpayer who made the donation.

Select whether you will be entering your **ITIN** or **SSN**.

Enter the **full** ITIN or SSN under **Taxpayer ID#**. You do not need to include any dashes.

Enter your full **First and Last Name**.

- Please do not use any nicknames or aliases. The name that is entered must match the name on your tax records.

Optional: Select an applicable **Suffix**.

Enter your **Full Name** as it appears on your Tax Return.

- You may choose to use a Middle Initial here.

Click **Next** to continue.

HCTC Contributions

Individual Household

Tax Payer Identification

* Taxpayer ID Type

☐ ITIN
 ☒ SSN

* Taxpayer ID #

781256911

Household Information

* First Name

Thomas

* Last Name

Smith

Suffix

--None--

* Full Name as It appears on Tax Return

Thomas Smith

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Screen 6a-2: Individual Household Entries - Address and Contact Information

Enter your **Street Address, City, and Zip Code**.

Select your **Country** and **State**.

Optional: Enter your **Email Address**.

- Please note that if you would like to receive your tax credit certificate via email, you must supply this information at this time. The Salesforce platform will send a link to the certificate via email after the nonprofit has reviewed and approved the contribution. This link follows data privacy requirements and can only be accessed with a login code provided via email.

Optional: Enter your **Phone Number**.

Click **Next**.



HCTC Contributions

Address

* Street

1313 Sherman St.

* City

Denver

* Country

United States

* State

Colorado

* Zip/Postal Code

80203

Email

dola_hctc@state.co.us

Phone

7206824972

A value is required.

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Screen 6b-1: Business or Foreign Business Entity Entries - Name

For Business/Foreign Business entries, the **Taxpayer ID that is associated with the business account that made the donation must be provided.** A Social Security Number is only an option if you have a single-member LLC that is registered as having a Social Security Number as the official tax ID.

Enter the **Business Name** as it appears on your **Tax Return**.

Select whether you will be entering your **FEIN** or **SSN**.

Enter the **full** FEIN or SSN under **Taxpayer ID#**. You do not need to include any dashes.

Enter the business's Main Point of Contact's full **First** and **Last Name**.

Optional: Select an applicable **Suffix**.

Click **Next** to continue.



HCTC Contributions

Business Entity

* Business Name as it Appears on Your Tax Return

Nonprofit ABC

* Taxpayer Type

☒ FEIN

☐ SSN

* Taxpayer ID #

841234567

Point of Contact

* First Name

Tonya

* Last Name

Smith

Suffix

--None--

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Screen 6b-2: Business or Foreign Business Entity Entries - Address and Contact Information

Enter the business's Street **Address**, **City**, and **Zip Code**.

Select the **Country** and **State**.

Optional: Enter the main Point of Contact's **Email Address**.

- Please note that if you would like to receive your tax credit certificate via email, you must supply this information at this time. The Salesforce platform will send a link to the certificate via email after the nonprofit has reviewed and approved the contribution. This link follows data privacy requirements and can only be accessed with a login code provided via email.

Optional: Enter the main Point of Contact's **Phone Number**.

Click **Next**.



HCTC Contributions

Address

* Street

1313 Sherman St.

* City

Denver

* Country

United States

* State

Colorado

* Zip/Postal Code

80203

Email

dola_hctc@state.co.us

Phone

7206824972

A value is required.

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Screen 7: Contribution Details

Enter your contribution details.

Select if you made a **Cash** or **In-Kind** Donation.

Enter the **Contribution Amount**.

- Please review the [Taxpayer Handbook](#) sections on [Contribution Types](#) and [Eligible & Ineligible Contributions](#) to ensure you are entering your donation accurately.

Enter the **Contribution Date**.

- This should be the date you made the donation, not the day you are completing this form.

An **Attachment** is required for gifts over \$5,000 for proof of cash contribution or third-party valuation of an in-kind contribution.

- If your donation requires documentation, please see the list of acceptable documents in the [Documentation](#) section of the Taxpayer Handbook.

Enter your name in the **Submitted by Name** textbox.

Click **Next** to continue.



HCTC Contributions

Contribution Details

* Contribution Type

☐ Cash
☒ In-Kind

* Contribution Amount ⓘ

\$5,001

* Contribution Date ⓘ

Jun 6, 2023

File Attachment
Receipt, Invoice, Check Copy, Credit Card Statement In-kind documentation must include independent third-party valuation of the item on the date of donation.

Documentation is required for donations over \$5,000.
In-kind documentation must include independent third-party valuation of the item on the date of donation.

Upload attachment

Upload Files

Or drop files

Submission Details
* Submitted By Name
Thomas Smith

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Screen 8: Review Contribution Details

After you complete the previous steps, you will be able to review your contribution's summary page before officially submitting to the nonprofit.

Once you have reviewed your contribution and confirmed that all information is accurate and correct, click Next to submit.

HCTC Contributions

Individual Household Summary
Prime Donor

First Name: Thomas
Suffix:

Last Name: Smith

Taxpayer Type: SSN
Email: dola_hctc@state.co.us

Taxpayer ID #: 781256911
Phone: 7206824972

Tax Return Full Name
Thomas Smith

Address
1313 Sherman St.
Denver, CO
80203
US

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Screen 9: Contribution Submission Complete

Once you have submitted your contribution, the final screen in Salesforce will appear confirming that your submission was successful.



Success

Your information has been submitted successfully

How To Access your Tax Credit Certificate

Tax Credit Decision Notice

Once you have successfully submitted your contribution via Salesforce, the nonprofit that you donated to will review the contribution. This includes confirming that the contribution was made to the organization, the information is accurate, and all documentation is in order (if applicable). Each nonprofit may have varying timelines for this review process. If you have questions regarding this timeline, please reach out to your point of contact at the organization.

Once the nonprofit has reviewed your contribution, you will receive an email with the decision regarding your tax credit approval or denial.

Approval

If your tax credit is approved, you will receive your tax credit certificate via email or postal mail (depending upon if you entered your email into the Salesforce system at the time of submission). If you will be receiving the certificate via email, review the How to Access the Tax Credit Certificate section below. If you will be receiving the certificate via mail, that will be coming from your organization at a later date.

Denial

If your certificate has been denied, you will receive the reason for this decision via email. Please reach out to your organization's point of contact if you have any questions regarding this decision.

How to Access the Tax Credit Certificate

Certificates will be distributed based on the certificate frequency that the nonprofit has chosen for their organization. Certificate frequency descriptions are below. Please contact the main point of contact at your organization for information regarding the timeline for receiving your tax credit certificate.



- Immediate frequency: The certificate will be produced in Salesforce immediately upon approval.
- Quarterly frequency: The certificate will not be produced in Salesforce immediately. The certificate will be produced on the last day of the month following the end of each quarter (April 30th, July 31st, October 31st, and January 31st).
- Annual frequency: The certificate will not be produced in Salesforce immediately. The certificate will be produced no later than February 15th of the following tax year by the nonprofit.

Via Email

For taxpayers with email addresses provided, the Salesforce platform will send a link to the certificate via email after the nonprofit has reviewed and approved the contribution. This link follows data privacy requirements and can only be accessed with a login code provided via email. This is to provide as much security of the taxpayer's information as possible. Any taxpayer expecting a tax credit certificate via email should regularly check their spam folder, as the link from Salesforce may go there.

The email will have the name of the organization's staff member who has approved the contribution as the "Sender". The subject line of the email will say "Contribution Approved for Homeless Contribution Tax Credit | Certificate Available".

 Contribution Approved for Homeless Contribution Tax Credit | Certificate Available External Inbox x

The body of the message will include a link and a secure code to access the certificate. Click on the link to access a secure Salesforce page that will allow you to access your tax credit certificate.



Dear Andrew Bernard,

One or more contributions have been approved, and the corresponding tax credit **certificate(s)** are ready to view or download. Please use the link and key below to access your Homeless Contribution Income Tax Credit **certificate**.

Certificate Key: 1685646731-HC-0000089

URL: <https://dolagrants2022--dev2.sandbox.my.site.com/dolahctc/s/tax-credit-certificate?certKey=1685646731-HC-0000089>

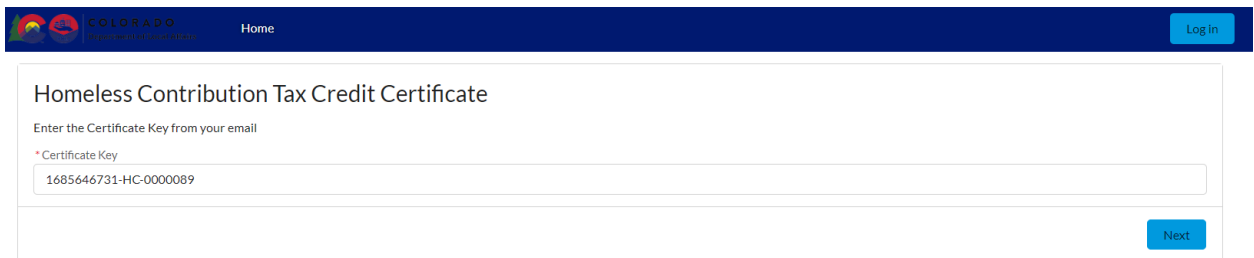
Best regards,

Division of Housing

State of Colorado Department of Local Affairs

Screen 1: Enter Certificate Key

Once the site is opened, enter the secure code that is provided in the email and click **Next**.



Screen 2: Donor Type

Select the **Donor Type** for the contribution.

Note: If you need guidance on whether your contribution was submitted for an Individual Household, Business, or Foreign Business Entity, please reach out to the point of contact at the organization you donated to.

Click **Next**.

Screen 3: Enter Certificate ID Information

Enter your **First Name**, **Last Name**, and last **Four Digits** of your **Taxpayer ID**.

Click **Next**.

Screen 4: Secure Link to Certificate

This screen confirms that your tax credit has been approved to receive a certificate.

Select **“Click here to download and print your certificate”**.

This will then take you to a PDF version of your tax credit certificate! You can then save the PDF to be stored on your computer and/or print at this time. It is best practice to save the certificate immediately so that you have it available in your records come tax season.

The link within the email does not expire for 5 years (this is the carryforward limit on tax credits anyways) after it has been issued. Certificates will have full name, Social Security Number, contribution amount, and all information that you entered upon submission.

Please check your spam folder, as your certificate may be there.

If you need the email to be resent at any time, please reach out to your organization's main point of contact for assistance.

Via Mail

If you or your organization have opted to distribute/receive certificates via mail, you will receive your certificate via mail after receiving approval. Your certificate will be printed from Salesforce, then mailed by the organization you donated to. Timeline's may vary based on organization capacity. If you have any questions, please contact your organization's main point of contact.

Helpful Tools and Resources

[HCTC Taxpayer Handbook](#)

[HCTC Formatting and Style Guide](#)

