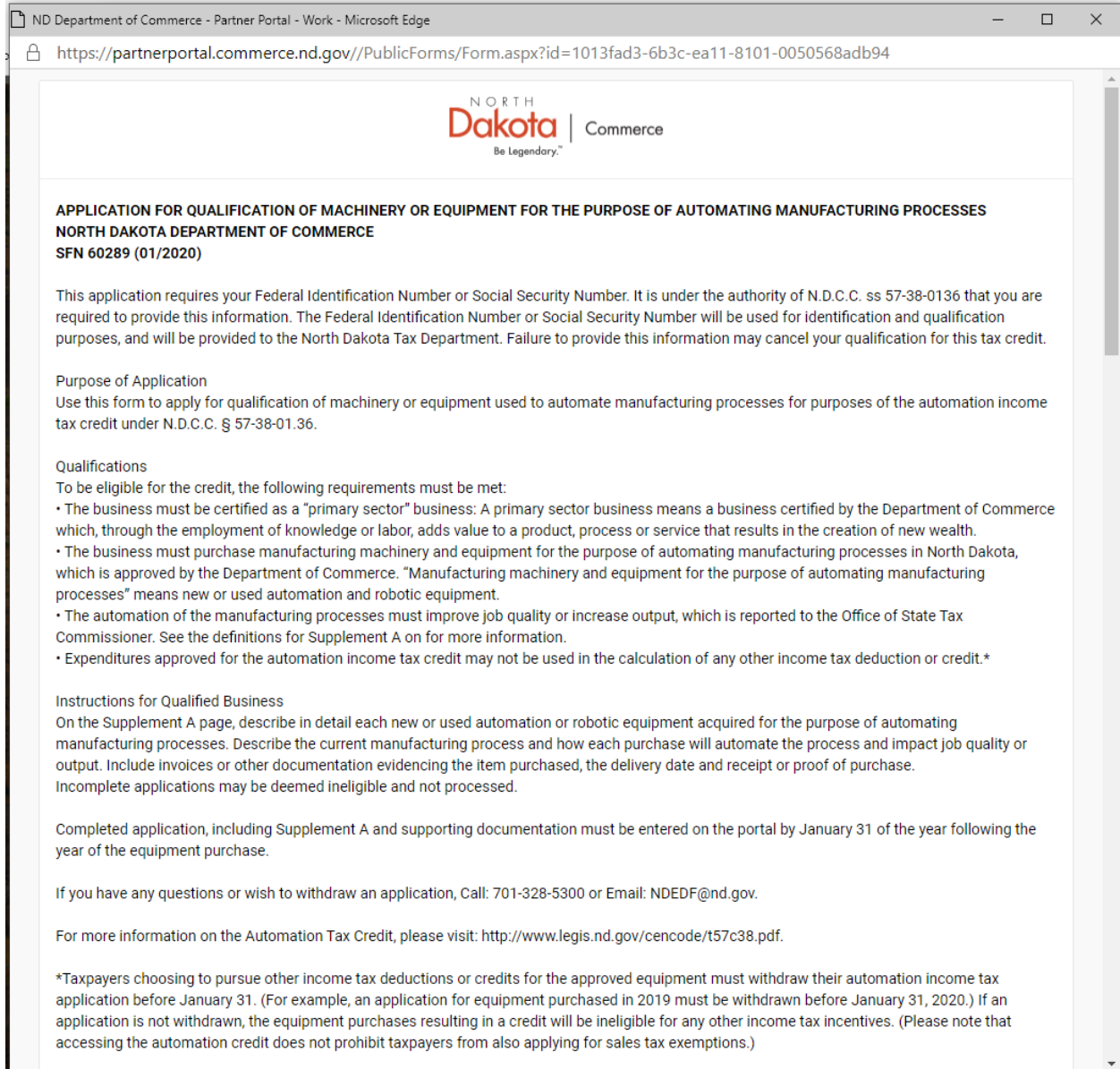


Automated Tax Credit Applications

Instructions for Applicant

Preliminary application can be accessed here:

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



ND Department of Commerce - Partner Portal - Work - Microsoft Edge

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

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APPLICATION FOR QUALIFICATION OF MACHINERY OR EQUIPMENT FOR THE PURPOSE OF AUTOMATING MANUFACTURING PROCESSES
NORTH DAKOTA DEPARTMENT OF COMMERCE
SFN 60289 (01/2020)

This application requires your Federal Identification Number or Social Security Number. It is under the authority of N.D.C.C. ss 57-38-0136 that you are required to provide this information. The Federal Identification Number or Social Security Number will be used for identification and qualification purposes, and will be provided to the North Dakota Tax Department. Failure to provide this information may cancel your qualification for this tax credit.

Purpose of Application
Use this form to apply for qualification of machinery or equipment used to automate manufacturing processes for purposes of the automation income tax credit under N.D.C.C. § 57-38-01.36.

Qualifications
To be eligible for the credit, the following requirements must be met:

- The business must be certified as a "primary sector" business: A primary sector business means a business certified by the Department of Commerce which, through the employment of knowledge or labor, adds value to a product, process or service that results in the creation of new wealth.
- The business must purchase manufacturing machinery and equipment for the purpose of automating manufacturing processes in North Dakota, which is approved by the Department of Commerce. "Manufacturing machinery and equipment for the purpose of automating manufacturing processes" means new or used automation and robotic equipment.
- The automation of the manufacturing processes must improve job quality or increase output, which is reported to the Office of State Tax Commissioner. See the definitions for Supplement A on for more information.
- Expenditures approved for the automation income tax credit may not be used in the calculation of any other income tax deduction or credit.*

Instructions for Qualified Business
On the Supplement A page, describe in detail each new or used automation or robotic equipment acquired for the purpose of automating manufacturing processes. Describe the current manufacturing process and how each purchase will automate the process and impact job quality or output. Include invoices or other documentation evidencing the item purchased, the delivery date and receipt or proof of purchase. Incomplete applications may be deemed ineligible and not processed.

Completed application, including Supplement A and supporting documentation must be entered on the portal by January 31 of the year following the year of the equipment purchase.

If you have any questions or wish to withdraw an application, Call: 701-328-5300 or Email: NDEDF@nd.gov.

For more information on the Automation Tax Credit, please visit: <http://www.legis.nd.gov/cencode/t57c38.pdf>.

*Taxpayers choosing to pursue other income tax deductions or credits for the approved equipment must withdraw their automation income tax application before January 31. (For example, an application for equipment purchased in 2019 must be withdrawn before January 31, 2020.) If an application is not withdrawn, the equipment purchases resulting in a credit will be ineligible for any other income tax incentives. (Please note that accessing the automation credit does not prohibit taxpayers from also applying for sales tax exemptions.)

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

Email Address *

Business Information

Primary Sector Certification

Is this Business Primary Sector Certified?

Yes

No

Business Information

Primary Sector Certification

Is this Business Primary Sector Certified?

Yes

No

Business Type

Partnership

Subchapter S Corporation

Corporation

Sole Proprietorship

Limited Partnership

Limited Liability Company

Other

Other

The undersigned certifies that the information provided in this document and its attachments is true and accurate.

Applicant Signature *

Title *

Application Date *



Save

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.

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Sign In

Partner Portal

Username

Password

[Forgot password?](#)

Sign In

3.5.0.0

Select Automated Tax Credit icon to complete the application.

North Dakota Work... PERSLINK Web Self... Power Apps State Surplus Prope... Oracle PeopleSoft S... D365 Commerce - Home Adobe Sign, an Ad... Billing ERG LIVE PORTAL ERG DEV CRM ERG TEST CRM ERG PROD CRM State of ND - ITD M...

Dakota | Commerce Peggy Weiss Test Company PW

Automated Tax Credit

News & Events
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Dakota | Commerce
701-328-5300

Click on the Automate Tax Credit Record to complete the application by adding Tax Credit Purchases and Invoice Line Items.

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Keyword Search

Add Automated Tax Credit Application

VIEWS

Applicant (Company) Name	Application Date	Application Status	Email Address	Physical Location (Street Address) of ND Facility	Physical City	Primary Sector Certified	Telephone Number
<input type="checkbox"/> Test Company	11/9/2020	In Process	peggyweiss@nd.gov	1600 E Century Ave	Bismarck	No	7013285326

Scroll down to the Supplement A section to enter the Tax Credit Purchases. Click Add to enter the Tax Credit Purchase information.

Other

Other

Supplement A

Tax Credit Purchases

Name or Description of Machinery or Equipment	Description	Created On
No records are available in this view		

Add

Add

Supplement A

Name or Description of Machinery or Equipment *

Test Equipment

Description

This equipment has many components to ensure the functionality and efficiency of the product. Each component and costs will be listed on the appropriate Invoice Line Item record.

Is this your final Tax Credit Purchase entry for the application?

Yes

No

Cancel Save

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:

Supplement A

Tax Credit Purchases

Name or Description of Machinery or Equipment	Description	Created On
Test Equipment	This equipment has many components to ensure the functionality and efficiency of the product. Each component and costs will be listed on the appropriate Invoice Line Item record.	1/11/2021 1:58 PM

Add

You will notice the Tax Credit Purchase screen has added an Invoice Line Items section.

Test Equipment

Test Equipment

Description

This equipment has many components to ensure the functionality and efficiency of the product. Each component and costs will be listed on the appropriate Invoice Line Item record.

Invoice Line Items Add

Tax Credit Purchase	Vendor(s)	Component	Delivery Date	Invoice Amount	Amount Paid	Non-Qualifying Cost	Qualifying Purchase Cost	Non-Qualifying Cost Adjustment	Net Adjusted Purchase Cost	Company	Created On
No records are available in this view											

Cancel Save

Add Invoice Line Item records as needed to complete the Tax Credit Purchase.

Test Equipment

Add

General

Tax Credit Purchase *

Vendor(s)

Component *

Delivery Date

Is this your final T

The screenshot shows a web application interface for managing 'Test Equipment'. A modal window is open, allowing for the editing of an invoice line item. The modal contains the following fields:

- Delivery Date:** 12/30/2020
- Invoice Amount:** \$ 50.00
- Amount Paid:** \$ 50.00
- Non-Qualifying Cost:** \$ 0.00

At the bottom of the modal, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red circle. Below the modal, at the bottom of the main window, there are also 'Cancel' and 'Save' buttons.

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 to 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.

Test Equipment

Notes

Add a note:

Attach File:

Choose Files No file chosen

Add Note Cancel

Cancel Save

Cancel Save

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

Save the application for the review process to begin.

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