



## community development partnership

*Creating opportunities for people to live, work, & thrive on the Lower Cape*

### Processing your Community Investment Tax Credit

#### How It Works

Thank you for investing in the Community Development Partnership (CDP). We want to ensure the tax credit process is as smooth as possible for you, so we've included a step-by-step explanation of what you can expect. Please don't hesitate to be in touch if you have questions.

- I) **DONATION** - Donor makes a contribution of \$1,000 or more to the CDP.
  
- II) **FORM CITC** – This is the Form that is completed to process your tax credit donation. Below are some instructions for the new system.
  1. Because you have made a Community Investment Tax Credit donation in the past, you already have an account set-up.
  2. Follow this link - <http://hed-citc.azurewebsites.net> – to create a new FORM CITC for this year. You'll need your Username and password from last year. Check the email this document came with for the Username we have on file. If you can't remember your password, you can request a new one.
  3. After logging in, you will be brought to your **Taxpayer Information Screen**. Here you have the following options:
    - Change Your Password
    - Initiate a **New** Form CITC
    - Revise Form CITC (once it has been created)
    - Track the Status of Form CITC (once it has been submitted)
  4. Click on “**New**” to create a FORM CITC for this year (see pink arrow on far left in the screenshot below).

Profile Update Notification Sent

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT  
COMMUNITY INVESTMENT TAX CREDIT PROGRAM

TAXPAYER INFORMATION SCREEN

Edit Profile Change Password Sign Out

New	INVESTMENT DATE	INVESTMENT AMOUNT	TAXPAYER SIGNED	PARTNER NAME	PARTNER ADDRESS	PARTNER PRIMARY	PARTNER SIGNED
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- Complete the remaining required fields (same fields as prior years).

To Note: Where it asks for “Name of Recipient Community Partner or Community Partnership Fund (UWMB)” there is a drop down menu. We are listed as **Lower Cape Cod Community Development Corporation d/b/a Community Development Partnership**.

- If a Certificate of Compliance is required, you will upload it here.

**To Note:** All donors identifying as an employer must submit a Certificate of Compliance from the Department of Unemployment Assistance with their Form CITC in order to receive a tax credit. Forms can be obtained via the employer’s account at—

<http://www.mass.gov/lwd/unemployment-insur/employers/>.

5. Once the form is complete, click **Submit**. At that time, we’ll receive notification that Form CITC is ready for us to complete our portion.
6. When our section is complete, we’ll submit it to the MA Department of Housing and Community Development and email you to let you know it’s done.

III) Your **CITC Certificate Number** will be issued by DHCD upon receipt of the Form CITC. Instructions on how to access your certificate will be sent via email. It is anticipated this will take 3-4 weeks from submission of FORM CITC.

You will use the CITC Certificate Number to claim the credit when filing your taxes. If you have no tax liability (e.g. donor is an out of state donor, a nonprofit foundation or a donor advised fund) or your tax liability is less than the credit amount, you will receive a refund check for the amount of the tax credit.

Call Laura Cannata at (508) 290-0126 or email [laura@capecdp.org](mailto:laura@capecdp.org) with any questions.

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