

## How to Claim your Community Investment Tax Credit (CITC)

Thank you for your generous donation! The following steps will walk you through the process of claiming your tax credit. The process should take no longer than a few minutes. If you have any questions, please contact us at [citc@asiancdc.org](mailto:citc@asiancdc.org).

### CITC Credentials Enclosed



You will receive an email from [CITC@mass.gov](mailto:CITC@mass.gov) with the subject line "CITC Credentials Enclosed" containing the login url, username and temporary password that you can change upon logging in for the first time.

The CITC Applications website can be found at <http://hed-citc.azurewebsites.net>. Please use the following username and one-time password to log in to the system.

UserName: **your username**

Password: **your password**

When you first sign in to the system you will be required to create a user profile before doing anything else. Once you have completed the profile you will be able to change your password.

Upon logging in, you will fill out the profile with all applicable information as it will appear on your tax return.

### DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT COMMUNITY INVESTMENT TAX CREDIT PROGRAM

#### TAXPAYER INFORMATION SCREEN

You must complete and save your user profile before going proceeding any further.

**Taxpayer** \*(Taxpayer information should be entered **exactly** as it appears on the tax return.)

Type

Address Line 1

Address Line 2

City, St, ZIP

Telephone  Extension

E-Mail

Business Type  Type of Reporting Year

Save Cancel

### DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT COMMUNITY INVESTMENT TAX CREDIT PROGRAM

#### TAXPAYER INFORMATION SCREEN

Edit Profile

Change Password

Sign Out

The next screen will allow you to:

- Change your password
- Edit your profile
- Create a CITC submission form
- Check the status of your claim after submitting your application

New	INVESTMENT DATE	INVESTMENT AMOUNT	TAXPAYER SIGNED	PARTNER NAME	PARTNER ADDRESS	PARTNER PRIMARY	PARTNER SIGNED
Select							

Individuals, corporations and other entities that make a cash contribution resulting in a qualified investment in an awarded Community Development Corporation (CDC) or Community Support Organization (CSO), referred to as a Community Partner, or to a Community Partnership Fund, administered by the United Way of Massachusetts Bay (UWMB), will earn tax credits equal to fifty percent (50%) of the total qualified investment made by the taxpayer, subject to the limits prescribed in M.G.L. c. 62, § 6M and c. 63, § 30 E. Upon certification of the qualified investment, the Massachusetts Department of Housing and Community Development (DHCD) will issue a CITC Certificate to the below named taxpayer and will include a unique Massachusetts Department of Revenue (DOR) certification number, which is required to claim credits.

## Part I - Section A - Taxpayer & Investment Information

### Taxpayer Information

This section is to be completed by ALL investor taxpayers

#### Type of Taxpayer\*

- Individual
- Joint
  - Business (Non Pass-Through Entity)
  - Trust (Pass-Through Entity)
  - Partnership (Pass-Through Entity)
  - Corporation (Pass-Through Entity)
  - S-Corporation (Pass-Through Entity)
- Other

Fill out all fields as listed on your tax return.

The date of investment can be found on the donation acknowledgement letter that was mailed/mailed to you.

Under "Name of Recipient Community Partner...", look for "Asian CDC" on the dropdown menu (3rd name down).

For goods and services provided, please refer to the donation acknowledgement letter with that information listed.

#### Date of Investment\*

Today Clear  
 Year Month Day

Amount of Investment to Community Partner or Community Partnership Fund (UWMB)\*  
(not to be less than \$1,000)

Name of Recipient Community Partner or Community Partnership Fund (UWMB)\*

Were any goods or services received in exchange for the contribution?\*

- Yes  No

If goods and/or services were provided to the Community Partner, please describe the goods and/or services provided below.

Have we received and/or expect to receive payment from this Community Partner, in this year or the preceding year, in excess of \$1,000 for goods and/or services provided to the Community Partner.\*

- Yes  No

Taxpayer's Relationship to Community Partner

## Part I - Section B - Employee-Investor and Pass-Through Entity Information

Employer Investors: Employer taxpayers, taxpayers identifying as an employer pursuant to M.G.L. c. 151A §1 and provisions of §§ 8 and 8A, must submit a certificate of compliance from the Department of Unemployment Assistance (DUA) with this application. The certificate must be dated no more than 90 days prior to the submission of this application to DHCD and may be obtained online through the employer's UI account at: <http://www.mass.gov/uid/unemployment-insur/employers/>

#### DUA Certificate of Compliance Information\*

- Yes - This investment is made by an employer taxpayer. [Certificate of Compliance must be uploaded as part of this application process.](#)
- No - This investment is not made by an employer taxpayer. No Certificate is required.

Upload Certificate of Compliance

Is the taxpayer name in Section A a pass-through entity?\*

- Yes  No

If you are filing as a business and are an employer, select "Yes" and follow the link on the page to obtain a Certificate of Compliance and upload it to the portal. We cannot process your claim (if filing as a business) without this document.

Sign the waiver at the bottom, click Submit, and then you're done! You will receive an email in 2-3 weeks when your certificate is available to download as a PDF.