

HCTC Taxpayer Salesforce User Guide

Colorado Department of Local Affairs

Division of Housing

Homeless Contribution Tax Credit (HCTC) Portal

Table of Contents

Purpose.....	3
Accessing the Taxpayer Salesforce Portal.....	3
Schedule and Deadlines.....	4
Formatting and Style Guide.....	4
How To's.....	5
How to Submit Contributions.....	5
Screen 1: Salesforce Access Agreement.....	5
Screen 2: Formatting and Style Guide Training and Document.....	6
Screen 3: Nonprofit Selection.....	6
Screen 4: Project Selection.....	7
Screen 5: Contributor Type.....	8
Screen 6a-1: Individual Household Entries - Name.....	8
Screen 6a-2: Individual Household Entries - Address and Contact Information...	9
Screen 6b-1: Business or Foreign Business Entity Entries - Name.....	10
Screen 6b-2: Business or Foreign Business Entity Entries - Address and Contact Information.....	11
Screen 7: Contribution Details.....	12
Screen 8: Review Contribution Details.....	13
Screen 9: Contribution Submission Complete.....	14
How To Access your Tax Credit Certificate.....	14
Tax Credit Decision Notice.....	15
Approval.....	15
Denial.....	15
Via Email.....	16
Screen 1: Enter Certificate Key.....	17



Screen 2: Donor Type.....	18
Screen 3: Enter Certificate ID Information.....	18
Screen 4: Secure Link to Certificate.....	19
Screen 4 (Alternative): Access Error Screen.....	20
Tips for Accessing a Tax Credit Certificate via Email.....	20
Tips for Accessing a Tax Credit Certificate via Mail.....	21
Helpful Tools and Resources.....	21



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 organizations 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.

It is recommended to use Google Chrome, as it is the preferred browser for accessing Salesforce.

Accessing the Taxpayer Salesforce Portal

The Salesforce portal for taxpayers is not available on the HCTC website. Please contact the approved organization you have contributed to for detailed instructions and the link to submit your contribution. Please do not use the Salesforce links on the HCTC website, as those are to create an organization Eligibility Application or for nonprofit staff to login.

A login is not required for donors to submit their contribution. Please do not click the "Log In" button in the top right corner once you have accessed Salesforce.



Schedule and Deadlines

Taxpayers using the HCTC Donor Portal must follow the program schedule and deadlines below.

January 24th: All contributions from the previous tax year must be entered into Salesforce. **Last day for donor-submitted contributions.**

April 30th: Quarter 1 deadline to submit contributions.

July 31st: Quarter 2 deadline to submit contributions.

October 31st: Quarter 3 deadline to submit contributions.

Donor-submitted contributions in the Donor Salesforce Portal are recommended to be submitted by the quarterly deadlines set throughout the year. However, the final deadline for donor-submitted contributions is January 24 for donations given in the previous calendar year. The Donor Salesforce Portal will not be available for taxpayers to submit their contributions from the previous tax year after this date. Contributions for the previous tax year submitted after the deadline of January 24 are considered "late" and must be submitted by the participating nonprofit staff via the late contribution form to generate a certificate immediately.

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

1. 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.
2. Once you have reviewed this page, select the acknowledgement **checkbox**.
3. Then, click **Next** to continue.

Homeless Contribution Income Tax Credit Contributions

Salesforce Access Agreement

Inaccurate information submitted could result in a denial of tax credit by the Colorado Department of Revenue.

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 last four digits of an SSN or ITIN, or full FEIN, 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
- Last four digits of Social Security Number (SSN), last four digits of Individual Taxpayer Identification Number (ITIN), or full nine digit Federal Employee Identification Number (FEIN)
- 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

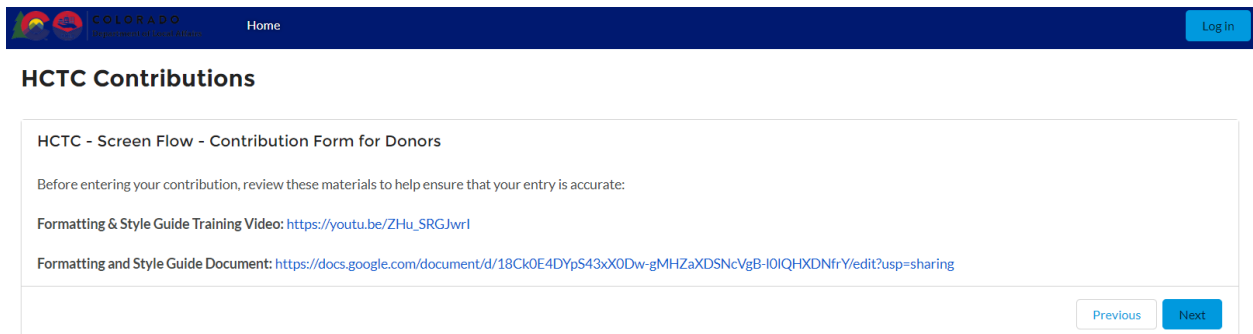


Screen 2: Formatting and Style Guide Training and Document

This screen provides links to a **Formatting and Style Guide Training Video**. This training provides further detail on the [Formatting and Style Guide](#).

The Division of Housing provides this information prior to beginning to enter information into the Salesforce system so that donors 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.

1. Once you have reviewed the [Formatting and Style Guide](#) information, click **Next** to begin the contribution submission process.



Screen 3: Nonprofit Selection

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



HCTC Contributions

Non-Profit Selection

Select the Non-Profit you have contributed to

* Search Non-Profit By Name

Search Accounts...

Q

Complete this field.

Previous

Next

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.

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

Please note: If you do not know which Project to select, please contact your nonprofit point of contact before proceeding. Nonprofits 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

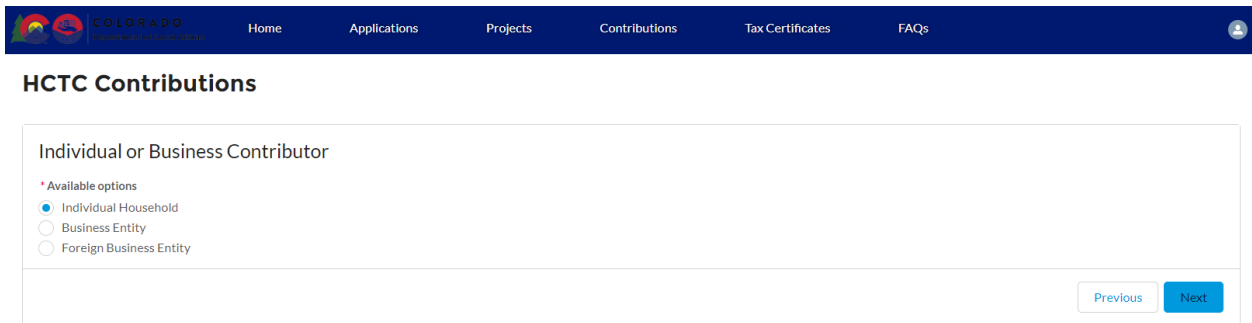
Project	Project Name
☐ Project-00018	Test Capital Campaign - Rural
☒ Project-00016	Test Outreach Program
☐ Project-00017	Test Shelter Capital Campaign

Previous

Next

Screen 5: Contributor Type

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



The screenshot shows the 'HCTC Contributions' header. Below it is a form titled 'Individual or Business Contributor'. Under the heading '* Available options', there are three radio button options: 'Individual Household' (which is selected), 'Business Entity', and 'Foreign Business Entity'. At the bottom right of the form, there are two buttons: 'Previous' and 'Next'.

Screen 6a-1: Individual Household Entries - Name

For Individual Household entries, the **Taxpayer ID** requires the last four digits of the **Social Security Number or Individual Taxpayer Identification Number**.

The Tax ID, address, and phone number must match the identity of the taxpayer who made the donation.

1. Select whether you will be entering your **ITIN or SSN**.
2. Enter the donor's **Tax ID Number as needed based on Tax ID Type**.
 - a. **SSN & ITIN:** Last four digits
 - b. **FEIN:** Full nine digit number
 - i. **Do not include dashes when searching for a Tax ID.** The field will only function if 9 characters total are entered and will result in an incorrect "No Donors Found" if dashes are included.
(Example: "123456789" will work successfully, while "123-45-6789" will result in an error).
3. Enter your full **First and Last Name**.
 - a. Tax ID number should match the donor's name as it appears on their tax return.

- i. Tax IDs for spouses cannot be mismatched. **The name on the certificate must match the Tax ID number.**
- b. Please do not use any nicknames or aliases. The name that is entered must match the name on your tax records.
- c. Do not include diacritics (accents) on letters when entering names. The system does not process these characters and will appear as a “?” on certificates and in reports.
4. **Optional:** Select an applicable **Suffix**.
5. Enter your **Full Name** as it appears on your Tax Return.
 - a. You may choose to use a Middle Initial here.
6. Click **Next** to continue.

Homeless Contribution Income Tax Credit Contributions

Individual Household

Tax Payer Identification

* Taxpayer ID Type

☐ ITIN
 ☒ SSN

* Taxpayer ID: Last Four Digits

1234

Household Information

* First Name

Tina

* Last Name

Smith

Suffix

--None--

* Full Name as it appears on Tax Return

Tina Smith

Previous

Next

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

1. Enter your **Street Address, City, and Zip Code**.
2. Select your **Country** and **State**.
3. **Optional:** Enter your **Email Address**.
 - a. 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.

4. **Optional:** Enter your **Phone Number**.
5. 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.

Previous

Next

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.

1. Enter the **Business Name** as it appears on your **Tax Return**.
2. Select whether you will be entering your **FEIN** or **SSN**.
3. Enter the **Taxpayer ID Number**.
 - a. For **SSN** entries: only enter the **last four digits**.
 - b. For **FEIN** entries: the **full nine-digit** FEIN is required.
 - i. Please do not need to include any dashes.
4. Enter the business's Main Point of Contact's full **First** and **Last Name**.
5. **Optional:** Select an applicable **Suffix**.
6. 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--

Previous

Next

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

1. Enter the business's **Street Address, City, and Zip Code**.
2. Select the **Country and State**.
3. **Optional:** Enter the main Point of Contact's **Email Address**.
 - a. 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.
4. **Optional:** Enter the main Point of Contact's **Phone Number**.
5. 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.

Previous

Next

Screen 7: Contribution Details

1. Enter your contribution details.
2. Select if you made a **Cash** or **In-Kind** Donation.
3. Enter the **Contribution Amount**.
 - a. Please review the [Taxpayer Handbook](#) sections on [Contribution Types](#) and [Eligible & Ineligible Contributions](#) to ensure you are entering your donation accurately.
4. Enter the **Contribution Date**.
 - a. This should be the date you made the donation, not the day you are completing this form.
5. Select the checkbox if this contribution was given through an **Intermediary Organization**.
 - a. What's an intermediary organization?
 - i. An intermediary organization is a nonprofit organization that is obligated to disburse contributions received from a taxpayer to a recipient organization as directed by the taxpayer.
 - ii. Common intermediary organizations: Colorado Gives Foundation, Give Pikes Peak, and United Way



6. An **Attachment** is required for gifts over \$5,000 for proof of cash contribution or third-party valuation of an in-kind contribution.
 - a. If your donation requires documentation, please see the list of acceptable documents in the [Documentation](#) section of the Taxpayer Handbook.
7. Enter your name in the **Submitted by Name** textbox.
8. Click **Next** to continue.

Homeless Contribution Income Tax Credit Contributions

Contribution Details

*** Contribution Type**

☒ Cash
☐ In-Kind

*** Contribution Amount** ⓘ

\$100.00

*** Contribution Date** ⓘ

Feb 23, 2025

*** Is this gift through an intermediary organization?**

No

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

Or drop files

Submission Details

*** Submitted By Name**

Tina Smith

Previous

Next

Screen 8: Review Contribution Details

1. After you complete the previous steps, you will be able to review your contribution's summary page before officially submitting to the nonprofit.
2. Once you have reviewed your contribution and confirmed that all information is accurate and correct, click Next to submit.



Homeless Contribution Income Tax Credit Contributions

Individual Household Summary	
Prime Donor	
First Name: Tina	Last Name: Smith
Suffix:	
Taxpayer Type: SSN	Taxpayer ID #: 1234
Email: breanne.valles@state.co.us	Phone: 7206824972
Tax Return Full Name	
Tina Smith	
Address	
1313 Sherman St.	
Denver, CO	
80203	
US	
Previous Submit	

Screen 9: Contribution Submission Complete

1. 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

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.

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.

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 appear as coming from “**DOLA HCTC Program**” 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

DOLA HCTC Program [via srl3uibiw92.3t-5bafreag.na123.bnc.salesforce.com](mailto:srl3uibiw92.3t-5bafreag.na123.bnc.salesforce.com)
to me ▼

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 James Halpert,

The nonprofit organization, as listed in this tax credit certificate, approved the related contribution(s) and has issued the certificate available via the link below. If you have questions regarding your tax credit, **do not reply to this email address**. Contact the organization to which you contributed.

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: 1696359631-HC-0002181

URL: <https://dolagrants2022.my.site.com/dolahctc/s/tax-credit-certificate?certKey=1696359631-HC-0002181>

Best regards,

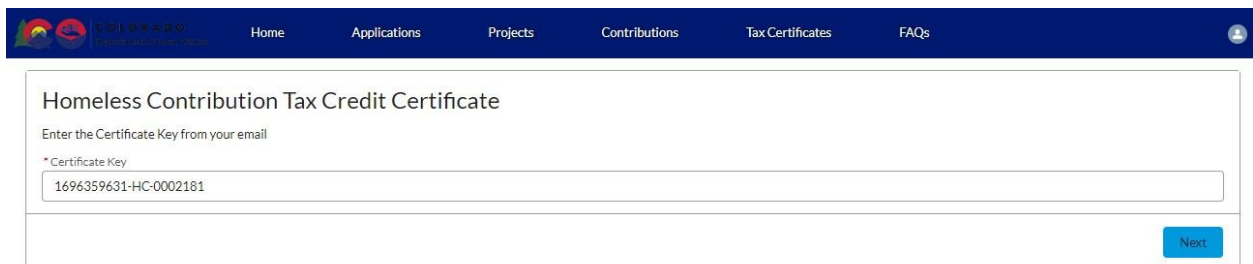
Division of Housing

State of Colorado Department of Local Affairs

Screen 1: Enter Certificate Key

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

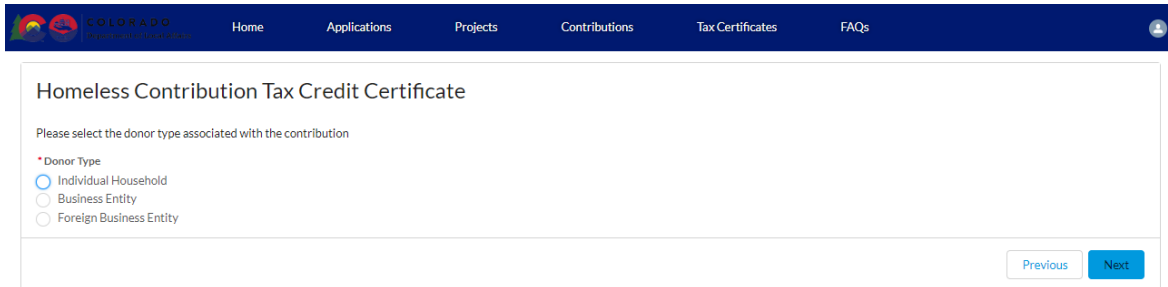
Note: Your certificate link should automatically populate in this field when using the URL provided in the email.



The screenshot shows a web application interface for the 'Homeless Contribution Tax Credit Certificate'. At the top is a dark blue navigation bar with the Colorado Department of Local Affairs logo and links for Home, Applications, Projects, Contributions, Tax Certificates, and FAQs. The main content area has a white background with the title 'Homeless Contribution Tax Credit Certificate'. Below the title, it says 'Enter the Certificate Key from your email'. There is a text input field labeled '* Certificate Key' containing the value '1696359631-HC-0002181'. A blue 'Next' button is located at the bottom right of the form.

Screen 2: Donor Type

1. Select the **Donor Type** for the contribution.
 - a. 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.
2. Click **Next**.



Screen 3: Enter Certificate ID Information

1. Enter your **First Name**, **Last Name**, and last **Four Digits** of your **Taxpayer ID**.
 - a. Please use the following tips when entering this information:
 - i. Use all proper capitalization, punctuation, and spelling.
 - ii. Exclude any additional characters, including spaces or dashes, before or after names when completing these fields.
 - iii. Ensure you are using the correct name. The name that is addressed in the email is the same name that should be used to access the certificate.
 1. Spousal names should not be submitted for certificates, and therefore not entered to access certificates.
 2. Middle initials do not need to be entered.
2. Click **Next**.

Screen 4: Secure Link to Certificate

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

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

This will 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 it is 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) after it has been issued. Certificates will have full name, Social Security Number, contribution amount, and all information that was 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.

Screen 4 (Alternative): Access Error Screen

If the information that has been entered does not match our records, Salesforce will not grant access to a certificate and will alert you.



The screenshot shows a web interface for the "Homeless Contribution Tax Credit Certificate". At the top, there is a dark blue header with the Colorado Department of Local Affairs logo, a "Home" link, and a "Log In" button. Below the header, the main content area has a title "Homeless Contribution Tax Credit Certificate" and a message: "The information you entered does not match our records. Please try again or reach out to HCTC@state.co.us for assistance". At the bottom right of the content area is a "Retry" button.

If you cannot access your certificate after entering your information into the designated fields, please review the [Tips for Accessing a Tax Credit Certificate via Email](#) section below and retry.

If you are still unable to access your certificate after verifying this information, please contact the organization you have donated to or dola_hctc@state.co.us for further assistance.

Tips for Accessing a Tax Credit Certificate via Email

If you encounter an error while trying to access your certificate or have questions regarding the email access, use the following tips when entering your information.

- Check your Spam or Junk Mail folders in your email.
 - Use the “Report as Safe” or “Report as not Spam” buttons within your email to ensure any future emails from DOLA HCTC Program are directed to your inbox.
- Use all proper capitalization, punctuation, and spelling.
- Exclude any additional characters, including spaces or dashes, before or after names when completing these fields.
- Ensure you are using the correct name. The name that is addressed in the email is the same name that should be used to access the certificate.
 - Spousal names should not be submitted for certificates, and therefore not entered to access certificates.



- Middle initials do not need to be entered.

Tips for Accessing a Tax Credit Certificate 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. Timelines 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](#)