

Automation Tax Credit Application

Instructions for Applicant

Process Overview

Process Overview This application comprises two phases:

Part 1: Account Creation and Initial Company Information

Create a new user login or log into an existing account and provide essential company information.

Upon submission, the Department of Commerce will review your eligibility based on criteria like Primary Sector Certification and company standing. You will receive an email invitation to complete the detailed application within three days.

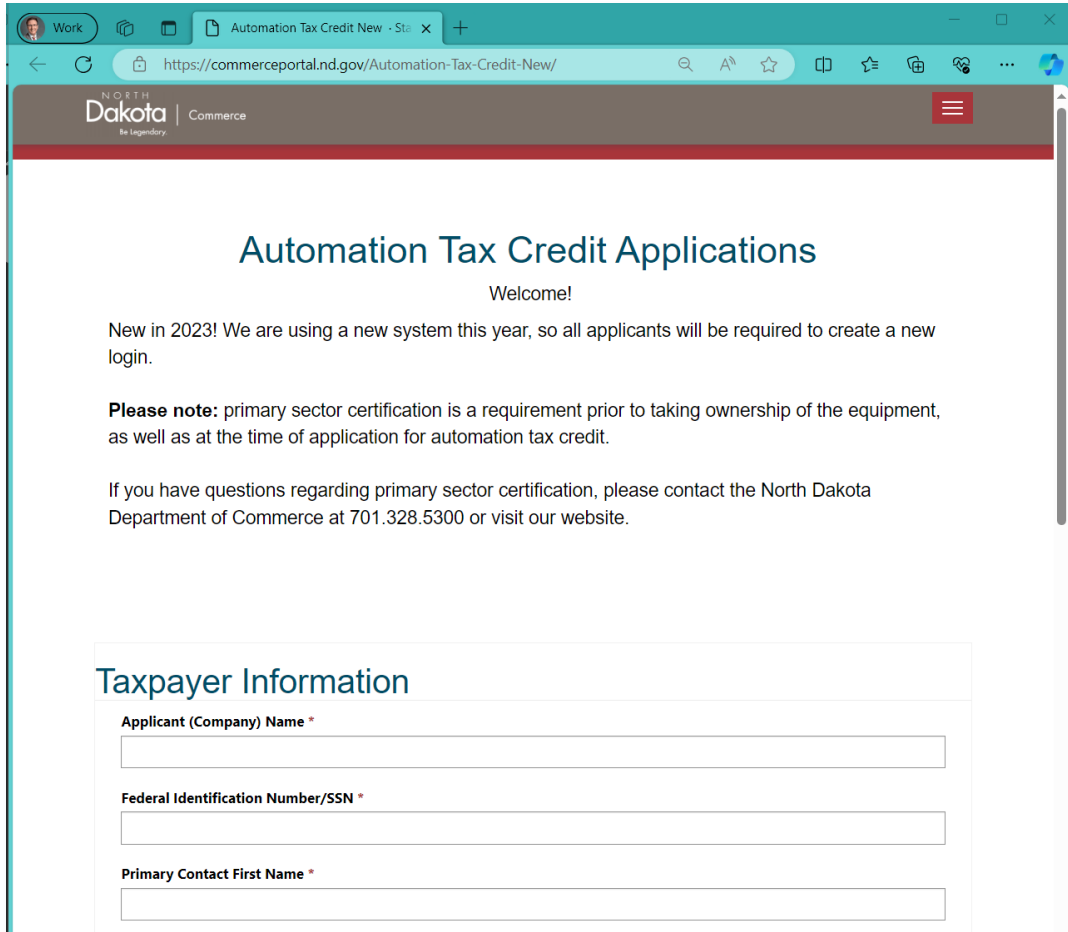
Part 2: Detailed Application

This section requires detailed information about machinery or equipment, including descriptions, justifications, itemized purchase lists, and supporting documentation.

The following pages provide a step-by-step walkthrough of the application process and online interface.

User Walkthrough: Preliminary Application

Accessing the Application Portal: Visit <https://commerceportal.nd.gov/Automation-Tax-Credit-New/> to begin the application process. You will see a page like the one shown below:



The screenshot shows a web browser window with the URL <https://commerceportal.nd.gov/Automation-Tax-Credit-New/>. The page header includes the North Dakota Commerce logo and a red navigation menu icon. The main heading is "Automation Tax Credit Applications" with a "Welcome!" message. A notice states that a new login system is in use for 2023. A "Please note" section explains that primary sector certification is required before equipment ownership and at the time of application. Contact information for the North Dakota Department of Commerce is provided. Below this is a "Taxpayer Information" section with three required input fields: "Applicant (Company) Name", "Federal Identification Number/SSN", and "Primary Contact First Name".

Automation Tax Credit Applications

Welcome!

New in 2023! We are using a new system this year, so all applicants will be required to create a new login.

Please note: primary sector certification is a requirement prior to taking ownership of the equipment, as well as at the time of application for automation tax credit.

If you have questions regarding primary sector certification, please contact the North Dakota Department of Commerce at 701.328.5300 or visit our website.

Taxpayer Information

Applicant (Company) Name *

Federal Identification Number/SSN *

Primary Contact First Name *

1. Fill in the required information in the "Taxpayer Information" section. Please note the following tips:
 - a. **Applicant (Company) Name:** This should be the full legal name of your company.
 - b. **Federal Identification Number/SSN:** Input the company's Federal Identification Number or Employer Identification Number (EIN). If you're an individual applicant, you may use your Social Security Number.
 - c. **Primary Contact Name:** Provide the name of the primary contact person for this application. This person will receive email correspondence about the status of the application.
 - d. **Telephone Number:** Do not include dashes or other symbols.
 - e. **Physical City:** Click the magnifying glass symbol to select the appropriate North Dakota municipality which best describes the facility's location. This may be different than the city listed in your mailing address.

Taxpayer Information

Applicant (Company) Name *

Placeholder Automation Corp.

Federal Identification Number/SSN *

00-1234567

Primary Contact First Name *

Jane

Primary Contact Last Name *

Doe

Telephone Number *

7015550123

Physical Location (Street Address) of ND Facility *

1234 Prairie Lane

Physical City *

Bismarck



Physical State

ND



Physical Zip Code *

58501

2. After submitting this information, the following page will display. **You are now finished with this stage of the application and may close your browser window.**

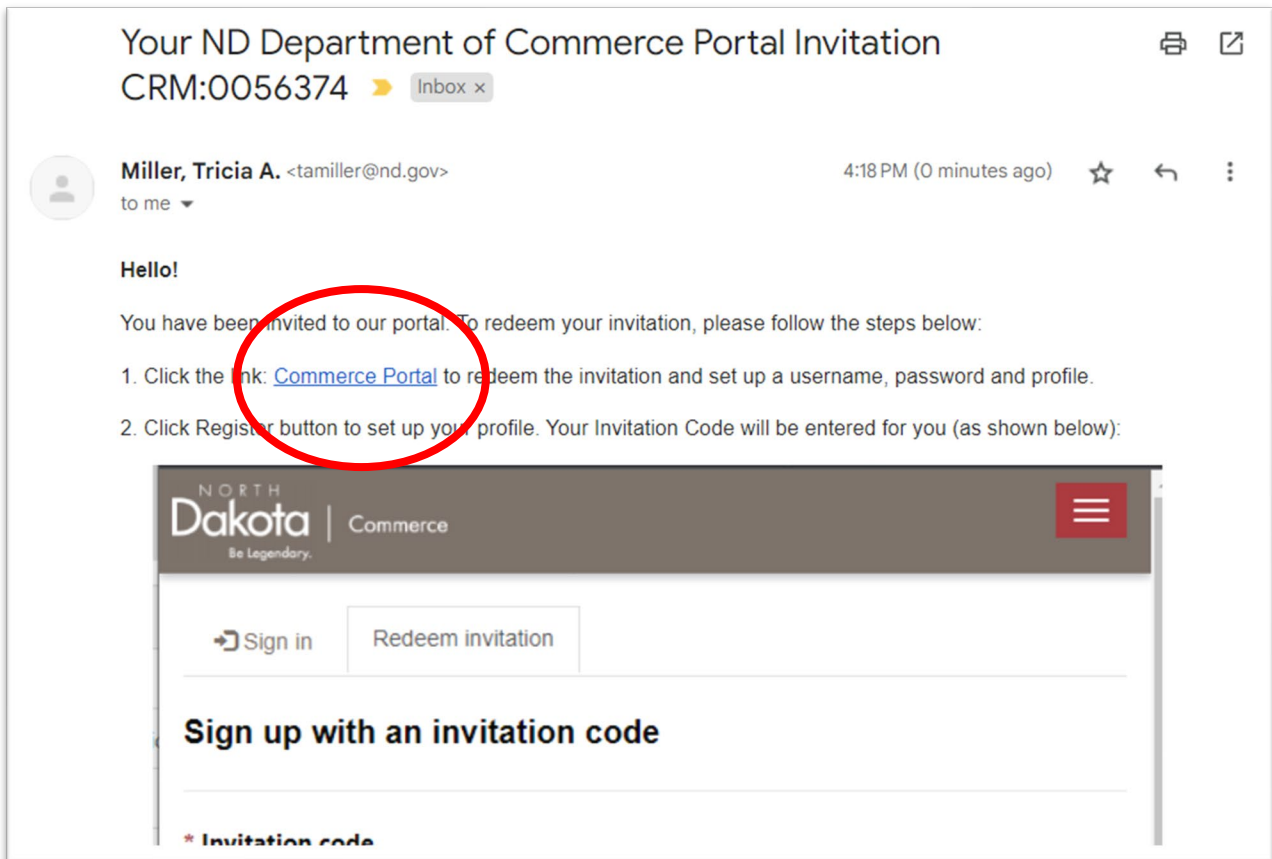
Thank you for your preliminary application and request for portal access.

We kindly request your patience as we review your initial submission. Please be on the lookout for an email invitation, which will arrive within three business days. This email will provide instructions on how to continue with the portal registration process and create your login credentials.

If you do not receive an email from Commerce within three business days, please check your junk folder and allow communications from that email address.

Detailed Application: User Guide

1. **Receiving the Detailed Application Invitation:** When the Dept. of Commerce has confirmed your company meets the preliminary requirements to apply, you will receive an email with a link and instructions to begin the second portion of the application. It will look something like this:



2. **Account Creation/Log In:** Use the link provided in the email to sign in or create a new account on the nd.gov portal. You will likely need to create an account by clicking the “create account” link. You may already have an account if you have utilized online services for things like renewing your vehicle registration or obtaining a hunting license. In that case, you will be prompted to login with your existing username and password.

North Dakota
login

Sign in

Don't have a North Dakota Login?
[Create an account.](#)

User ID

[Forgot user ID?](#)

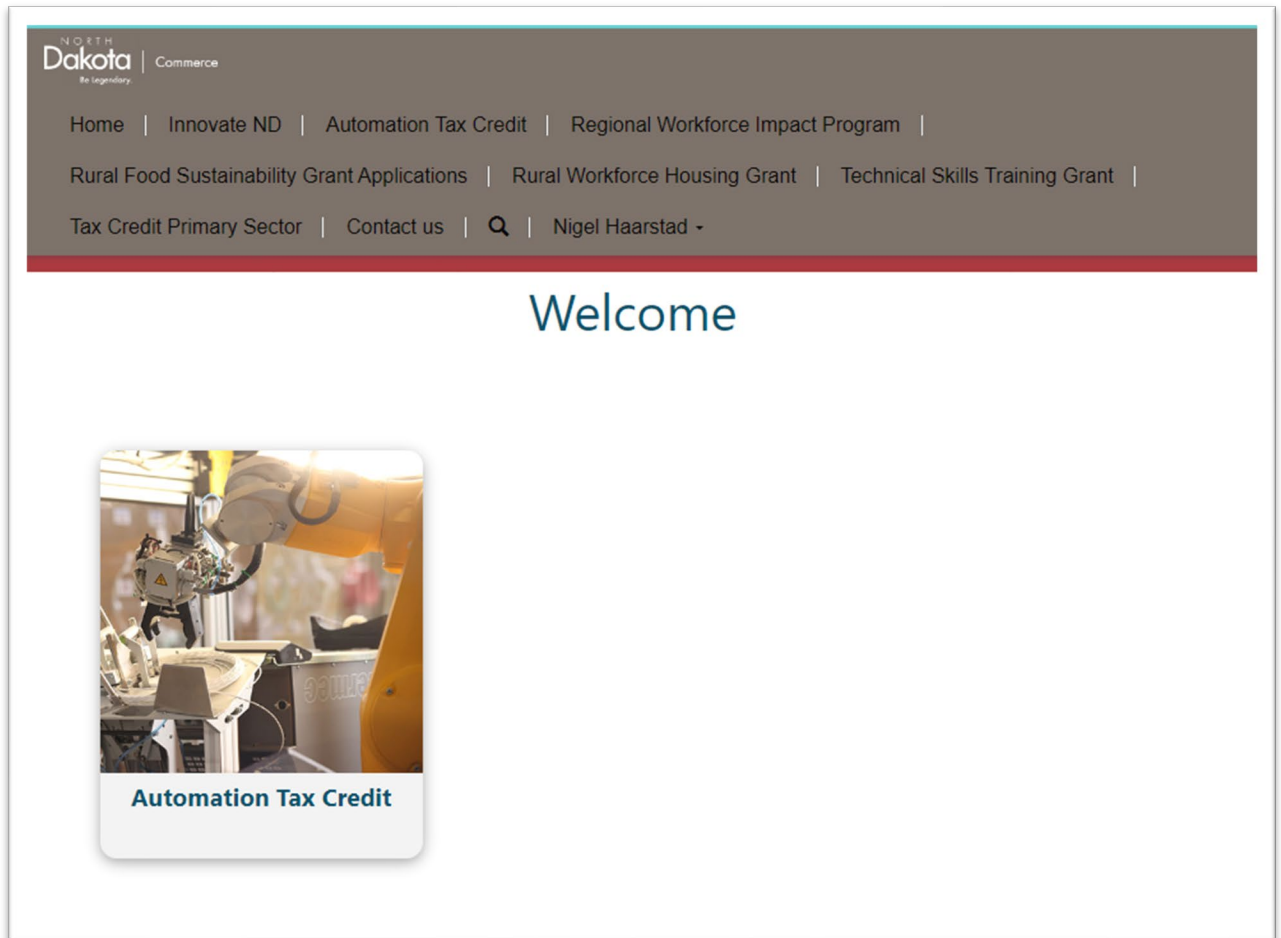
Password

[Forgot password?](#)


Sign In

[Update your account.](#)

3. **Navigating to the Tax Credit Application:** After logging in, select the Automation Tax Credit option to proceed.



4. **Accessing Your Application:** View and select your ongoing application from the list of started applications. To complete the application, please click on the downward-pointing arrow to the right.

Applicant Name ↑	Application Date	Tax Year	Application Status	Final Approved Amount	
Nigel's Testing		2023	Needs Additional Information	\$0.00	

5. **Adding Machinery or Equipment:** Use the interface to add new pieces of machinery or equipment, detailing their names and the manual processes they automate. Save your entries before proceeding. Each entry may include several line items or components. You will have the opportunity to upload invoices and other documentation by clicking the “add new line item” button.

Edit ×

Step 1. Select "Add New Line Items"
Step 2. Save

Tax Credit Purchase

Name or Description of Machinery or Equipment *

Describe and justify the manual process that is being automated with this equipment

Enhances precision in our machinery assembly line. Traditional torque wrenches require manual calibration to ensure they apply the correct amount of torque to a bolt or nut. This process can be time-consuming and prone to human error. This wrench not only automatically adjusts to the required torque but also gives a cheerful beep upon successful completion, spreading a sense of achievement.

Invoice Line Items

Q Add New Line Item

6. **Attaching Line Item Documentation:**
For each piece of machinery or equipment, attach relevant documents for each component or invoice line item, remembering to save your progress.

Once you have clicked “save” you will see the option to add attachments.

The screenshot shows a web form titled 'Create' for 'Invoice Line Item/Component'. The form includes the following fields:

- Vendor(s):** Precision Tools
- Component:** Auto Torque Wrench
- Delivery Date:** 7/31/2023
- Invoice Amount:** \$ 1,312.50

Instructions for attachments are listed in red text:

- 1. Invoice
- 2. Proof of Purchase
- 3. Proof of Delivery/Ownership

7. **Uploading Required Documents:**
Upload and save all necessary documents, including invoices and proof of purchase/delivery.”

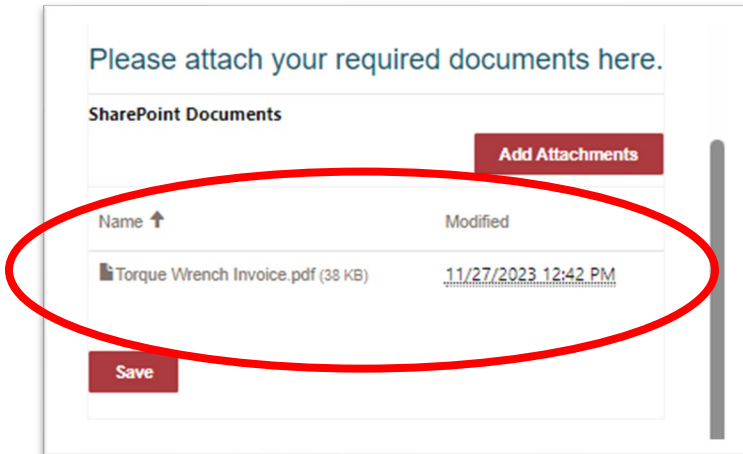
Click “Save” when you have uploaded all attachments. You can return to this screen later if needed.

The screenshot shows the 'Create' form with the following fields:

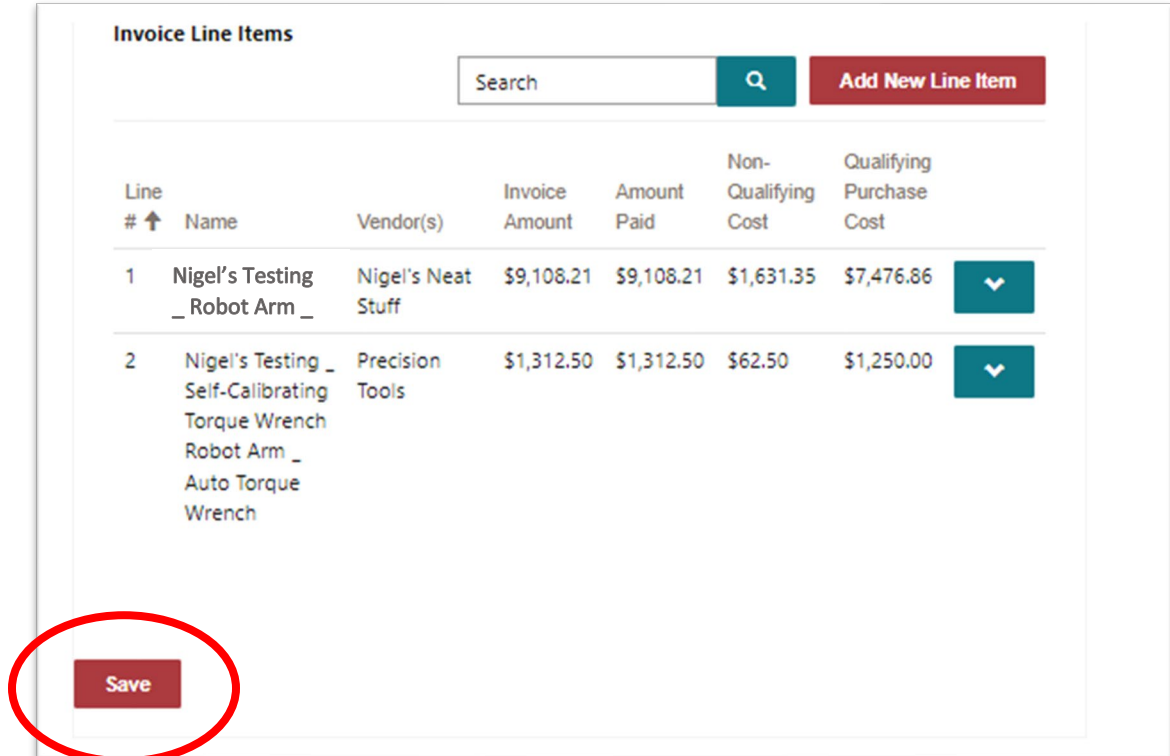
- Invoice Amount:** \$ 1,312.50
- Non-Qualifying Cost:** \$ 62.50
- Additional information, if requested:** (Empty text area)

The text 'Please attach your required documents here' is visible. Below it, the 'SharePoint Documents' section contains an 'Add Attachments' button, which is circled in red. A message below the button states: 'There are no folders or files to display.' At the bottom of the form is a 'Save' button.

8. **Reviewing Attachments:** Verify that all attachments have been successfully uploaded and are listed.



9. **Finalizing Line Items:** Return to the main screen to review and complete the entries for each machinery or equipment piece. Continue adding items as necessary. Click "save" to return to the main list of machinery or equipment in the application.



10. **Overview of Submitted Equipment:** Review the list of all machinery or equipment you've entered. Edit or add additional items as needed, then save and continue.

To edit any of the entries, click the downward-pointing arrow to the right of that entry.

To complete the application, click "save and continue."

Please add your new machinery or equipment you believe qualifies for the Automation Tax Credit by selecting Add New Equipment.

Q Add New Equipment

Name or Description of Machinery or Equipment	Qualified Status	Approved Amount (Developer)	Final Approved Amount	Created On ↓	
Self-Calibrating Torque Wrench Robot Arm		\$0.00		10/3/2023 1:48 PM	▼
Expensive Widgets		\$0.00		10/3/2023 1:21 PM	▼

Previous Save & Continue

11. **Confirming Accuracy of Information:** Affirm the accuracy of all uploaded information before proceeding.

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

Applicant Signature

Title

Previous Save & Continue

12. **Submitting the Application:** After ensuring all necessary documents are attached and information is correct, submit your application. Your application is now complete.

STOP!
Have you included:
Invoice
Proof of Purchase
Proof of Delivery/Ownership

North Dakota Department of Commerce reserves the right to deny incomplete applications. Prior to submitting, please ensure you have provided all required documentation (invoice, proof of payment, and proof of delivery or ownership) for each line item.

I certify I have provided all documentation in this application and this is my final submission.

[Submit](#) [Previous](#)