



Maryland

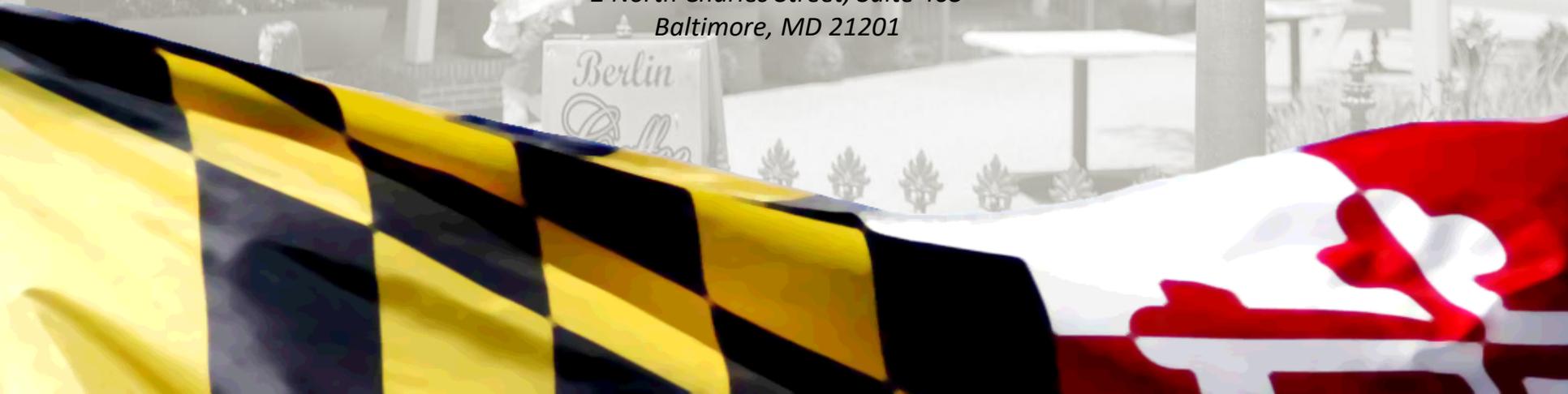
DEPARTMENT OF HOUSING
AND COMMUNITY DEVELOPMENT

Kenneth C. Holt, Secretary

ENDOW MARYLAND TAX CREDIT PROGRAM

Submitting On-Line Donation Certifications

*Division of Neighborhood Revitalization
2 North Charles Street, Suite 405
Baltimore, MD 21201*



Accessing Endow Maryland



Once you log in (<https://projectportal.dhcd.state.md.us/logout2.aspx>), you will see the following page:

DEPARTMENT OF
MARYLAND HOUSING & COMMUNITY DEVELOPMENT

MY HOME MY APPLICATIONS MY AWARDS MY REQUESTS FOR PAYMENT MY CERTIFICATIONS MY AWARD PROGRESS REPORTS

My Reports | My Training Materials | My Organization(s) | My Profile | Logout

SHOW HELP

Welcome Barbara
Authorized Official
[Change My Picture](#)

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant

Hello Barbara, please choose an option below.

View Available Funding Opportunities
You have 12 opportunities available.
Select the **View Opportunities** button below to see what is available to you.

VIEW OPPORTUNITIES

My Inbox
You have 20 new messages.
Select the **Open My Inbox** button below to open your system messages.

OPEN MY INBOX

My Tasks
You have 13 new tasks.
You have 0 tasks that are critical.
Select the **Open My Tasks** button below to view your active tasks.

OPEN MY TASKS

Top of the Page
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Click the “My Applications” search tab

- From the drop down menu, select the Application Type (Program Name and Year, ie. “Endow Maryland Tax Credit Program FY2020”) and click the “Search” button.

TIP: If you get zero results, you may need to click the “Clear” button and then perform the search again.

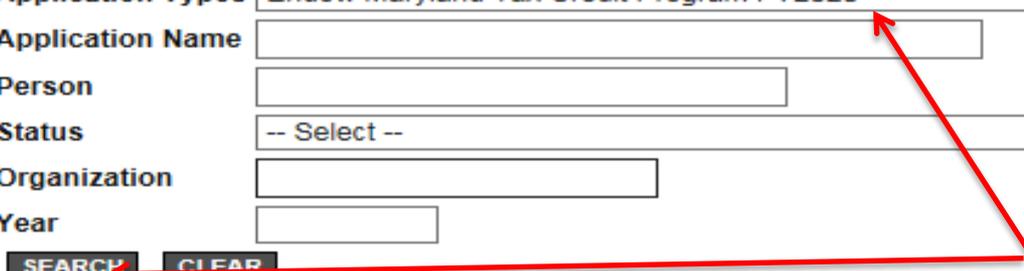
 [Back](#)

My Applications

Use the search functionality below to find a specific Application.

Search Applications

Application Types	<input type="text" value="Endow Maryland Tax Credit Program FY2020"/>
Application Name	<input type="text"/>
Person	<input type="text"/>
Status	<input type="text" value="-- Select --"/>
Organization	<input type="text"/>
Year	<input type="text"/>
<input type="button" value="SEARCH"/> <input type="button" value="CLEAR"/>	



- From the Search Results, click on the “Name” (Registration ID) to access Endow Maryland and be able to submit certifications or quarterly reporting

Export Results to Sort by:

Number of Results 16

Document Type	Organization	Name	Current Status	Year
Endow Application	The Holtzapple ENDOW Community Foundation	EMTC-2019-ENDOWCF-00085	Endow MD Active	2019



Submitting a Certification Form



TO SUBMIT A CERTIFICATION:

Once you selected and clicked on the “Name” link to access Endow Maryland, you will be brought to this page to begin the steps to submit a certification.

 [Back](#)

Endow Application Menu

Document Information: [EMTC-2019-ENDOWCF-00085](#)

 [Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Endow Application	The Holtzaple ENDOW Community Foundation	Authorized Official	Endow MD Active	01/01/2019 - N/A N/A

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

Click on the “View Related Items” button



TO SUBMIT A CERTIFICATION:

Related Documents

Sort search results by: Filter by Document Type:

Document Type	Name	Current Status	Period Date / Date Due	Created By	La
Endow Certification Form FY2019	Initiate a Endow Certification Form FY2019				
Endow Quarterly Report	Initiate a/an Endow Quarterly Report FY2019				
Endow Certification Form FY2019	ECF01-2019-085-BryanDonorNam-11-01-19	Certification Approved	01/01/2018 - N/A N/A	Dr. Bryan Test-AuthorizedOfficial Jr. 11/4/2019 12:45:45 PM	Bryan Test-NRLeadership 11/4/2019 2:44:48 PM
Endow Certification Form FY2019	ECF02-2019-085-SistersofMercy-01-01-19	Certification Form in Process, Not Submitted	01/01/2018 - N/A N/A	Dr. Bryan Test-AuthorizedOfficial Jr. 11/4/2019 3:53:40 PM	Dr. Bryan Test-AuthorizedOfficial Jr. 11/4/2019 3:53:40 PM
Endow Quarterly Report	QR-EMTC-2019-ENDOWCF-085-Q2	Endow MD Quarterly Report Approved	04/01/2018 - N/A N/A	Dr. Bryan Test-AuthorizedOfficial Jr. 7/17/2019 2:14:54 PM	Bryan Test-ENDOWProjectManager 7/17/2019 2:37:42 PM

Click on the "Initiate" link to submit contribution for certification



To submit a Certification:

 [Back](#)

Endow Certification Form FY2019 Menu

Document Information: [ECF02-2019-085-SistersofMercy-01-01-19](#)

Parent Information: [EMTC-2019-ENDOWCF-00085](#)

 [Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Endow Certification Form FY2019	The Holtzapple ENDOW Community Foundation	Authorized Official	Certification Form in Process, Not Submitted	01/01/2018 - N/A N/A

Each certification you create will have its own id

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

Click on the “View Forms” button to enter donor and contribution information



Step 1: Certification of Contribution-QPEF Information

There are three steps to complete in order to submit a certification: The QPEF information, the donor details, and the donation details. These sections should be completed in this order.

Certification Forms Menu:

[Back](#)

Endow Certification Form FY2019 Menu - Forms

Please complete all required forms below.

Document Information: [ECF02-2019-085-SistersofMercy-01-01-19](#)

Parent Information: [EMTC-2019-ENDOWCF-00085](#)

[Details](#)

Forms

Status	Page Name	Note	Create
Training Documents and Resource Links			
	Endow MD Certification of Contribution Training Presentation (PDF)		
	Endow MD Tax Credit Activity Report		
Certification of Contribution Forms			
	Certification of Contribution - QPEF Information	Dr. Bryan Test- AuthorizedOfficial Jr.	AuthorizedOfficial Jr.
		11/4/2019 3:54:00 PM	11/4/2019 3:55:07 PM
	Certification of Contribution - Business Donor Details	Dr. Bryan Test- AuthorizedOfficial Jr.	
		11/4/2019 3:57:20 PM	
	Certification of Contribution - Donation Details and Submission	Dr. Bryan Test- AuthorizedOfficial Jr.	Dr. Bryan Test- AuthorizedOfficial Jr.
		11/4/2019 3:59:29 PM	11/4/2019 4:04:14 PM
	Change Status		
	Print Copy of Completed Certification Form		

This link will generate a PDF Tax Credit Activity Report that will list certifications submitted by your community foundation.

Click link to provide information on the QPEF the contribution is supporting

This link creates a printer-friendly PDF version of the completed certification.



Step 1 – QPEF Information: Once you click on Certification of Contribution-QPEF Information link, you will see:

[SAVE](#) [PRINT VERSION](#) [ADD NOTE](#) [CHECK GLOBAL ERRORS](#)

 [Back](#)

Document Information: [ECF02-2019-085-SistersofMercy-01-01-19](#)
Parent Information: [EMTC-2019-ENDOWCF-00085](#)

 [Details](#)

You are here: > [Endow Certification Form FY2019 Menu](#) > [Forms Menu](#) > Certification of Contribution

CERTIFICATION OF CONTRIBUTION - QPEF INFORMATION

Instruction: Click the "Save" button above to refresh certification and balance amounts.

ENDOW MD TAX CREDIT PROGRAM SUMMARY AND ACTIVITY TO DATE

The below information provides a current snap-shot of the Endow Maryland Program activity and balance. Click the "Save" button above to re-calculate.

Program Total and Balance Amounts

Endow MD Tax Credits Program Allocation:	\$250,000.00
Approved Certifications:	\$153,908.33
Pending Certifications:	\$3,715.32
Available Balance of Credits:	\$141,251.35

To begin, click the "Save" button above to re-calculate the current totals and balances for the Endow Maryland program.



QPEF Information: This section asks you to review and select the Qualified Permanent Endowment Fund (QPEF) to which this donation was applied.

QUALIFIED PERMANENT ENDOWMENT FUNDS (QPEFs)

Instructions:

The drop-down list below contains the names of the Qualified Permanent Endowment Funds you previously entered donation/certification, select the name of the QPEF to which this donation will be applied. Or, if the QPEF does not yet have a Name and Description of the Fund and then click the Save button.

Note: If the donation will be divided between multiple QPEF's, make sure each fund name appears as a selection in the drop-down list. If a QPEF is not yet in the drop-down list, repeat the data entry for fund name and description and click the save. Repeat these steps for each QPEF.

Select a QPEF from List:

When you select a fund and click the SAVE button, the name and description will populate below.

QPEF Name:	<input type="text" value="Another Bryan Test QPEF"/>	*	Description/Purpose of Fund:	<input type="text" value="Testing again"/>
QPEF Name:	<input type="text"/>	*	Description/Purpose of Fund:	<input type="text"/>

If the QPEF does not currently appear on the list, manually type the Name and Description and click SAVE

When you type in a QPEF and click SAVE, it will be added to the drop down list for future use.



QPEF Information:

CONTRIBUTOR/DONOR TAX TYPE

Instruction: Select the type of donor making the contribution to your foundation's QPEF
Note: this information is included and provided by your donor on the signed Donor Waiver Form

Contributor Type: *

Individual Business

If individual was selected, information required for individuals would appear.

Is this Business a Sole Proprietorship?

Yes No

Contributor's Tax Year (as reported to the IRS): *

Calendar Year (Jan-Dec)

Fiscal Year

Select and enter the "Type, "Tax Year", and "Tax Credit choice" of your donor for this contribution. This information was provided on the Donor Waiver form.

From: * To: *

Contributor Intends to Use the Tax Credit For: *

State Income Tax on Corporations

Once the information is entered, scroll down to the bottom of the page, and select the link to the next page to begin Step 2- Donor Details

Certification of Contribution Forms			
	Certification of Contribution - QPEF Information	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 3:54:00 PM	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 3:55:07 PM
	Certification of Contribution - Business Donor Details	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 3:57:20 PM	
	Certification of Contribution - Donation Details and Submission	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 3:59:29 PM	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 4:04:14 PM
	Change Status		
	Print Copy of Completed Certification Form		

Step 2 – Donor Details - Individual or Business

CERTIFICATION OF CONTRIBUTION - BUSINESS DONOR DETAILS

CONTRIBUTOR/DONOR INFORMATION

Instructions: If the business or individual has previously donated, their name and Tax ID will appear in the drop-down list below. Select their name, and the donor's details will auto-fill below.

Select Donor from List:

OR, If the contributing business or individual does not appear in the list above, fill out all required fields.

Federal ID: *

Legal Name of Business: *

Business Type or Status: *

If "Other", provide a Description:

Contact Information:

Prefix: * First Name: * Last Name: *

Title: *

Mailing Street Address: *

City: * State: * Zip: *

Phone #: *

Email: *

As with the selection of QPEF, the system will store previously-entered and saved donor information. Select a donor from the list and click the "Save" button to populate the donor's information.

If the donor is not in the drop down Donor list, fill-out all the donor details and click the SAVE button.

Step 2 – Donor Details - Individual or Business

COMMUNITY FOUNDATION/DONOR WAIVER

Instruction: The donor must complete and sign a [Community Foundation and Donor Waiver Form](#) to receive a Tax Credit. Each donor needs to provide a signed Waiver form for each Community Foundation to which they contribute in a given tax year. Each Certification of Contribution form must include a copy of this specific donor-signed Community Foundation/Contributor Waiver.

Please upload a PDF scan of the Signed-Waiver form and enter the Donor's signature date:

File Upload

DELETE *

Date Signed

*

When you click the "Save" button, the file will upload and will then appear as the document on-file, linked above.

Upload a scanned copy of the completed and signed Community Foundation Donor Waiver Form. Enter the date it was signed by the donor. Then click the SAVE button to complete the attachment.

When all required information and documents have been entered and saved, scroll down to the bottom of the page to click on the link for the next page to begin Step 3- Donation Details.

Certification of Contribution Forms			
	Certification of Contribution - QPEF Information	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 3:54:00 PM	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 3:55:07 PM
	Certification of Contribution - Business Donor Details	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 3:57:20 PM	
	Certification of Contribution - Donation Details and Submission	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 3:59:29 PM	Dr. Bryan Test- AuthorizedOfficial Jr. 11/4/2019 4:04:14 PM
	Change Status		
	Print Copy of Completed Certification Form		

Step 3 – Donation Details

CONTRIBUTION INFORMATION

Instruction: In the Date field below, enter the date the contribution was received. Examples include: the date the check was received in the mail; or the date the credit card was charged; or the date the online transaction was performed; or the date the stock shares were transferred.

Contributor's Name: Andrew Eldrich, Sisters of Mercy

Date of Contribution: 01/01/2019 *

Enter the Date of the Contribution

Instruction: In the Contribution Amount field below, enter the amount and select the Qualified Permanent Endowment Fund name. In cases of more than one QPEF, click the save button to enter another amount and QPEF.

Note 1: If the QPEF name does not appear in the drop-down list, return to the QPEF Information page to enter and save the fund name and description.

Note 2: The Total Amount of Contribution must match the full amount of the donation, as evidenced in your attachment below.

	<u>Amount</u>	<u>Select the QPEF for this amount</u>
Contribution Amount and QPEF:	\$10,000.00	Another Bryan Test QPEF ▼
Contribution Amount and QPEF:	\$10,000.00	Bryan's QPEF Test ▼
Contribution Amount and QPEF:		▼
Total Amount of Contribution:	\$20,000.00	
Tax Credit Amount:	\$5,000.00	

Enter the amount of the contribution and select the QPEF from the drop down list

If the contribution is split between multiple QPEFs, after you enter the first amount and QPEF, click SAVE and additional rows/fields will be provided.

Step 3 – Donation Details

CONTRIBUTION TYPE AND EVIDENCE

Instructions: Select the contribution type and upload the supporting evidence documents. Click the "Save" button to complete each attachment and to create additional upload fields.

Check

Enter the Number of the Check and attach a copy of the check.

<input type="text" value="4013671"/>	<input type="text" value="8051002-SupportingDocA.pdf"/>	<input type="button" value="Browse..."/>	<input type="checkbox"/> DELETE
<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Browse..."/>	

Check Number

<input type="text" value="0000054A"/>
<input type="text" value=""/>

Provide required information for the transaction type.

Cash/Credit

Stock/Other

Select the type of contribution.

Upload proof of donation and enter a short description



Step 3 – Donation Details: Verify and Submit

COMMUNITY FOUNDATION DONOR THANK YOU LETTER

*Instructions: A scanned copy of the **signed** Thank You Letter mailed to the donor by your organization must appear on your organization's letterhead and must contain all the language in the template, but you can not remove any of the language from the template.*

Browse... DELETE*
4013671_1017036-EndowCertDHCDThankYou_SistersOfMercy.pdf

Upload a scan of the signed "Thank You" letter the donor received from your community foundation.

COMMITMENT OF CONTRIBUTION VERIFICATION

Instruction: You must verify that the information and documentation provided are an accurate description of the value of the contribution received by your foundation to support your QPEFs. To verify the contribution, enter your name and title in the fields below and click the "Save" button at the top of the page. Then click the "Verify" button.

Verified by: Prefix: * First Name: * Last Name: *
Title: *

DON'T FORGET TO CLICK THE SAVE BUTTON BEFORE CLICKING THE VERIFY BUTTON.

Click the "Verify" button below if the Certification is ready to Submit

VERIFY

Enter your contact information.
You must click SAVE before clicking the green VERIFY button

Step 3- Donation Details: Verify and Submit

Once you click “Verify”, you will be sent to this page to actually confirm and submit the certification.

Possible Statuses

CERTIFICATION FORM SUBMITTED

Click the “Confirm” button below to complete and verify the submission of this Certification form.

CONFIRM SUBMISSION OF THIS CERTIFICATION

CERTIFICATION FORM CANCELLED

Click the “Cancel” button below to terminate this Certification form. You may not begin a new Certification form until the one in process has been submitted or cancelled.

CANCEL THIS CERTIFICATION

**You MUST click “Confirm Submission”
in order to submit the certification for
review and approval.**

If you click “Cancel this
Certification”, the
certification and all
information entered will be
deleted.

Certification Submitted: Upon successful submission, you will be returned to this Certification's main page.

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Endow Certification Form FY2019 Menu

Document Information: [ECF02-2019-085-SistersofMercy-01-01-19](#)

Parent Information: [EMTC-2019-ENDOWCF-00085](#)

 [Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Endow Certification Form FY2019	The Holtzapple ENDOW Community Foundation	Authorized Official	Certification Form in Review	01/01/2018 - N/A N/A

Once submitted, the Certification Form's ID number/name will change to include the Donor's name and date of donation.

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

Once submitted, the status of the certification will change from "In Process" to "In Review"



Certification Review & Approval



DHCD Review and Approval of Certifications

- Your submitted Certification Forms will be reviewed by Endow MD Program Staff. It is first reviewed and approved by program staff and then by DHCD leadership.
- If a problem is discovered, the Certification will be returned for modifications and you will be notified by email. The notification email will include notes outlining any needed corrections in order to approve the certification.
- Once modifications have been corrected, you will resubmit the certification by using the same process competed for initial submission.
- Once the certification is approved, you will receive an email which will include the DHCD Donor Thank You Letter that you will mail or email to your donor.

