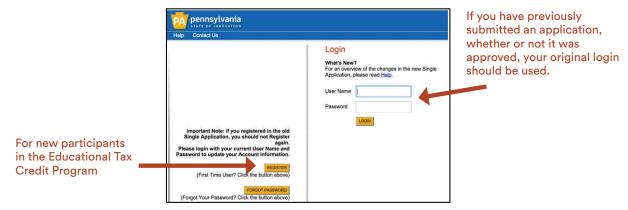


# **How to Apply for Educational Tax Credits**

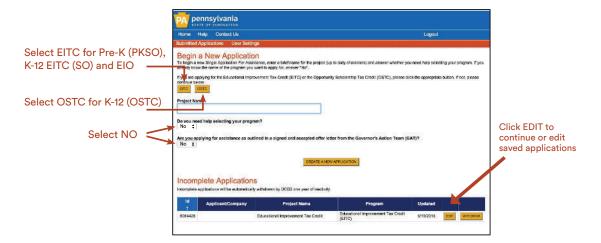
Pre-K EITC (PKSO), K-12 EITC (SO), OSTC and EIO

### Always consult your tax expert first.

- Step 1: Go to dced.pa.gov/eitc click "Apply" at the top of the page.
- Step 2: Login page: If you are a new participant, register for a new account. Returning participants should enter the previous year's username and password. For help, contact DCED Customer Service at 1.800.379.7448.



Step 3: In the upper left corner, select either EITC (for Pre-K/PKSO, K-12 EITC and EIO) or OSTC. To open a saved application that you began but did not finish, click EDIT.



Step 4: Please remember to complete this form in your application.



#### HINTS AND TIPS AS YOU COMPLETE THE APPLICATION:

- Your application saves automatically.
- An electronic signature is acceptable. The Commonwealth highly recommends that you print out and save a hard copy of the application and signature page. They may perform random audits.
  - FOR RENEWING APPLICATIONS: Do not hit the "submit button" until May 15th, or the application will be denied, you will have to complete the online version again and approval of your application will be at risk.
  - FOR NEW APPLICATIONS: Do not hit the "submit button" until July 1st or the application will be denied, you will have to complete the online version again and approval of your application will be at risk.

The Foundation for Jewish Day Schools would be glad to review your completed application before submission - simply email it to ematz@jewishphilly.org in advance of your submission date (noted above).

#### On page 1 of the application:

NAICS code can be found by following through with the three selection boxes under the NAICS box.

#### On page 2 of the application:

- I. When asked for "County" hit "State-wide Project" and the rest will autofill.
- II. When asked if you authorize DCED to switch your application request from EITC to OSTC should your application not be approved, the Foundation prefers that you answer "no," leaving your application on the EITC wait list.
- If you selected EITC on the "Begin a New Application" page, for question #4 you will be selecting one of the following options:



EIO Year 1 of a 1-year commitment (75% tax credit)

• EIO Year 1 of a 2-year commitment (90% tax credit)

Contact the Foundation

• EIO Year 2 of a 2-year commitment (90% tax credit)



- PKSO (Pre-school) Year 1 of a 1-year commitment (90-100% tax credit) not preferred
- PKSO (Pre-school) Year 1 of a 2-year commitment (90-100% tax credit) PREFERRED
- PKSO (Pre-school) Year 2 of a 2-year commitment (90-100% tax credit) PREFERRED
- SO (K-12) Year 1 of a 1-year commitment (75% tax credit) not preferred
- SO (K-12) Year 1 of a 2-year commitment (90% tax credit) PREFERRED
- SO (K-12) Year 2 of a 2-year commitment (90% tax credit) PREFERRED

If you wish to support a specific synagogue kindergarten program, select one of the "SO" options

III. If you selected OSTC on the "Begin a New Application" page, for question #4 you will be selecting one of these following options:



- OSTC Year 1 of a 1-year commitment (75% tax credit) not preferred
  OSTC Year 1 of a 2-year commitment (90% tax credit) PREFERRED
  OSTC Year 2 of a 2-year commitment (90% tax credit) PREFERRED

You should receive notification from DCED beginning in early August through the fall in a letter indicating either approval of your application.

#### When your application is approved, please follow these procedures:

- Contact the Foundation when your application has been approved: 215.832.0525 or ematz@jewishphilly.org.
- Within 60 calendar days of receipt of the approval letter, the following items must be submitted to the Foundation:
  - A check made out and sent to the Foundation for Jewish Day Schools, 2001 Market Street, Suite 2300, Philadelphia, PA 19103
  - A copy of DCED's letter of approval
  - A donation data confirmation must be included, which is available at jewishphilly.org/eitc
- You will receive an email from the Foundation confirming receipt of the check and documents.
- Within a few business days you will receive an email containing a Charitable Contribution Receipt and Acknowledgment, which must be forwarded to DCED immediately.
- Your business most likely needs to submit PA Rev-1123 on or before your tax return or extension filing due date (check with your accountant to confirm).



## Thank you for making an impact on a child's education!

For more information, contact Ellen Horowitz Matz, Director, Education Tax Credit Program, at 215.832.0525 or ematz@jewishphilly.org, or visit jewishphilly.org/eitc.