NCDOR NORTH CAROLINA DEPARTMENT OF REVENUE

Application for Extra Credit Grant Program—Bulk Application Step by Step Guide

Introduction

This guide walks you through the process of submitting applications for the Extra Credit Grant program using the bulk upload method. The bulk upload method may only be used by professional tax preparers to submit two or more applications on behalf of individuals who filed a 2019 North Carolina Individual Income Tax Return and did not report a qualifying child on Line 10a of Form D400. Eligibility information can be found here.

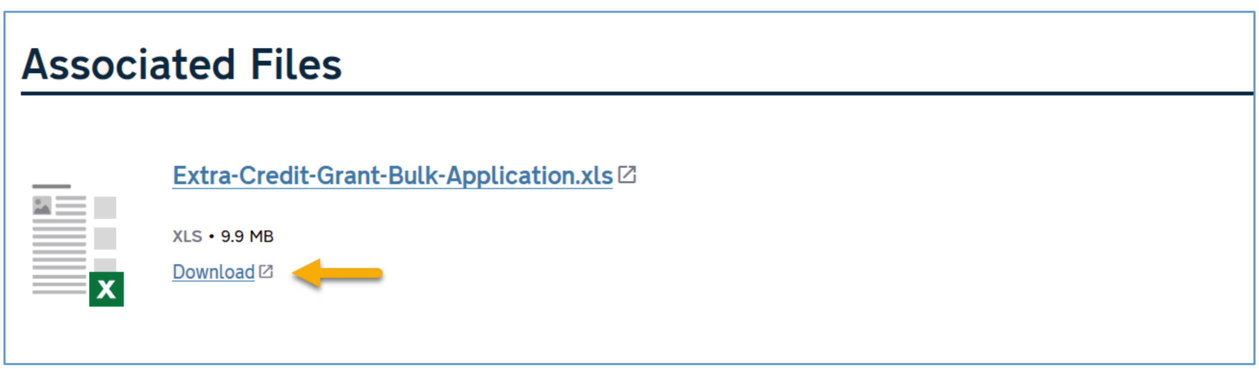
Note: The optimal browser to use for the bulk upload method is the latest version of Firefox, Google Chrome, or Microsoft Edge. If you are using Internet Explorer or Safari, we recommend you switch to one of the optimal browsers. You must have Microsoft Excel 2003 or later for Windows computers, or Microsoft 2004 or later for Mac computers to use the bulk application workbook. This workbook is not compatible with Numbers for Mac or other spreadsheet software.

Additional Assistance

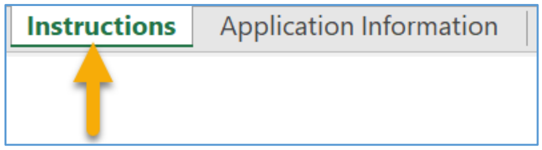
After reviewing this document, if you need additional assistance creating or uploading the Extra Credit Grant Bulk Application, call 1-877-308-9103 and Select options 2, 1, and 2, or email ECGBulk@ncdor.gov.

Instructions

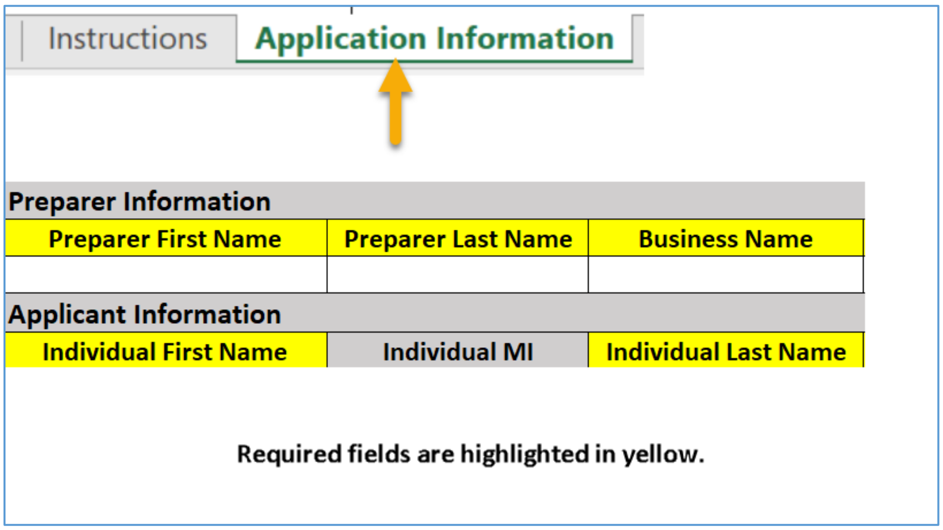
Step 1: On the Bulk Upload for Extra Credit Grant Applications page, download the Extra Credit Grant – Bulk Application file located at the bottom of the page.



Step 2: After downloading the application, review the instructions on the **Instructions** tab.



Step 3: Click on the **Application Information** tab where you will enter the preparer and applicant information. Required fields are highlighted in yellow. Information MUST be entered starting on line 7 of the application spreadsheet.



Step 4: Complete the **Preparer Information** section. Enter the required and optional preparer information as noted below.

- Preparer First Name – Enter your first name. (Required)
- Preparer Last Name – Enter your last name. (Required)
- Business Name – If applicable, enter the name of your business or organization. (Optional)
- SSN, FEIN, or PTIN – Enter your 9-digit SSN, your 8-digit preparer tax identification number (PTIN), or the 9-digit FEIN of the business. Do not enter dashes. (Required)
- Mailing Address Line 1 – Enter your business mailing address. (Required)
- Mailing Address Line 2 - If needed, enter the remaining business mailing address information (ex. Suite #, Building #, etc.). (Optional)
- City – Enter the city for the business mailing address. (Required)
- State – Enter the state for the business mailing address. (Required)
- Zip Code – Enter the 5-digit or 9-digit zip code for the business mailing address. Do not enter dashes. (Required)
- Email Address – Enter your business email address. (Required)
- Contact Phone Number – Enter your phone number. Do not enter dashes or parentheses. (Required)

Step 5: Complete the **Applicant Information** section. Enter the required and optional applicant and qualifying child information as noted below. Please do NOT skip rows when entering applicant information.

- Individual First Name – Enter the first name of the applicant. (Required)
- Individual MI – Enter the middle initial of the applicant. (Optional)
- Individual Last Name – Enter the last name of the applicant. (Required)
- Individual SSN – Enter the 9-digit social security number (SSN) of the applicant. Do not enter dashes. (Required)
- Spouse First Name, MI, and Last Name – If the 2019 return was filed as Married Filing Jointly (MFJ), enter the first name, middle initial, and last name of the spouse. (Optional)
- Spouse SSN – If the 2019 return was filed as MFJ, enter the 9-digit SSN of the spouse. Do not enter dashes. (Optional)
- Mailing Address Line 1 – Enter the mailing address of the applicant. (Required)
- Mailing Address Line 2 - If needed, enter the remaining mailing address information for the applicant (ex. Apartment #, Building #, etc.). (Optional)
- City – Enter the city for the applicant's mailing address. (Required)
- State – Enter the state for the applicant's mailing address. (Required)
- Zip Code – Enter the 5-digit or 9-digit zip code for the applicant's mailing address. Do not enter dashes. (Required)

  Note: Only qualified children who are 16 or younger at the end of 2019 should be listed.
- Child 1 First Name – Enter the first name of the qualifying child. (Required)
- Child 1 Last Name – Enter the last name of the qualifying child. (Required)
- Child 1 SSN – Enter the 9-digit SSN of the qualifying child. Do not enter dashes. (Required)
- Child 1 Relationship to Applicant – Select the qualifying child's relationship to the applicant (ex. son, daughter, stepchild, eligible foster child, etc.). (Required)
- Child 2 through Child 9 – If the applicant has more than one qualifying child, enter/select the first name, last name, 9-digit SSN, and relationship to the applicant of each additional qualifying child in the remaining fields. Do not enter dashes in the SSN field.

Note: If the applicant has more than nine qualifying children, you must complete the mail-in version of Forms NC-1105 and NC-1105-1 available at www.ncdor.gov/extracredit. You may submit more than one Form NC-1105-1 for the applicant if needed.

Step 6: Save the Excel file to a folder that you can easily access. The file should be saved using the following file naming convention:

ECG_<Preparer name>_<File submission date>_<File number>.xls

Example: ECG_Mickey Mouse CPA Service_030121_1.xls

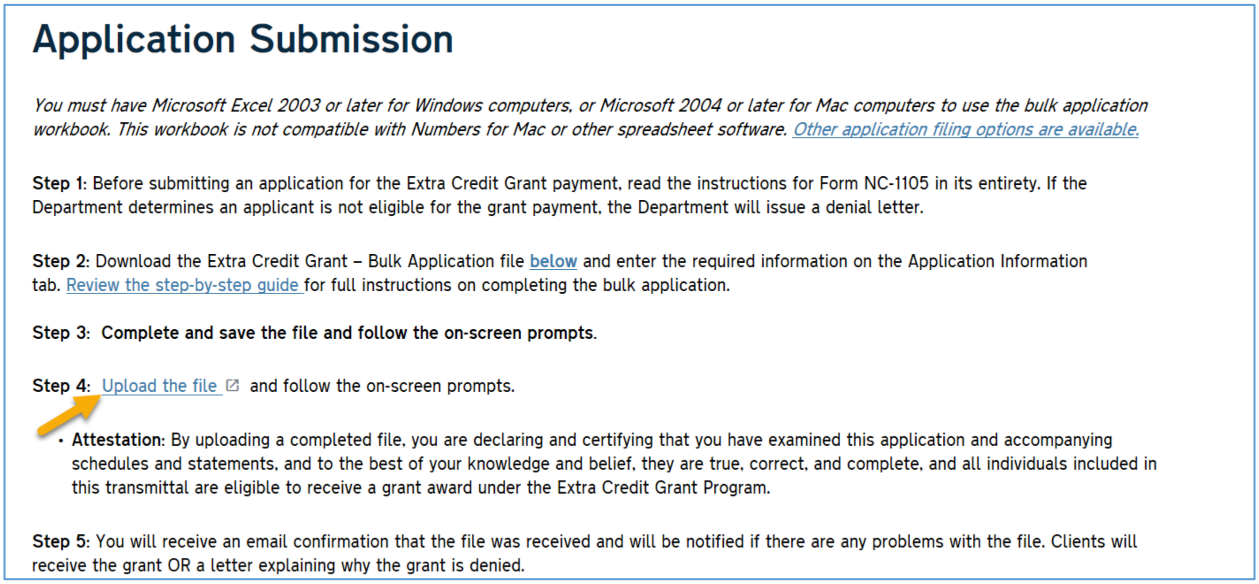
Note:

- *The File submission date should be in mmddyy format.*
- *If you need to submit more than one file on a particular submission date, increment the file number by 1 for each subsequent file submitted. For example, the first file submitted on*

3/1/21 should be file number 1, the second file submitted on 3/1/21 should be file number 2, and so on.

- *The file must be saved in .xls or .xlsx format.*

Step 7: On the Bulk Upload for Extra Credit Grant Applications page, click the "Upload the file" link to upload an application



Application Submission

You must have Microsoft Excel 2003 or later for Windows computers, or Microsoft 2004 or later for Mac computers to use the bulk application workbook. This workbook is not compatible with Numbers for Mac or other spreadsheet software. Other application filing options are available.

Step 1: Before submitting an application for the Extra Credit Grant payment, read the instructions for Form NC-1105 in its entirety. If the Department determines an applicant is not eligible for the grant payment, the Department will issue a denial letter.

Step 2: Download the Extra Credit Grant – Bulk Application file below and enter the required information on the Application Information tab. Review the step-by-step guide for full instructions on completing the bulk application.

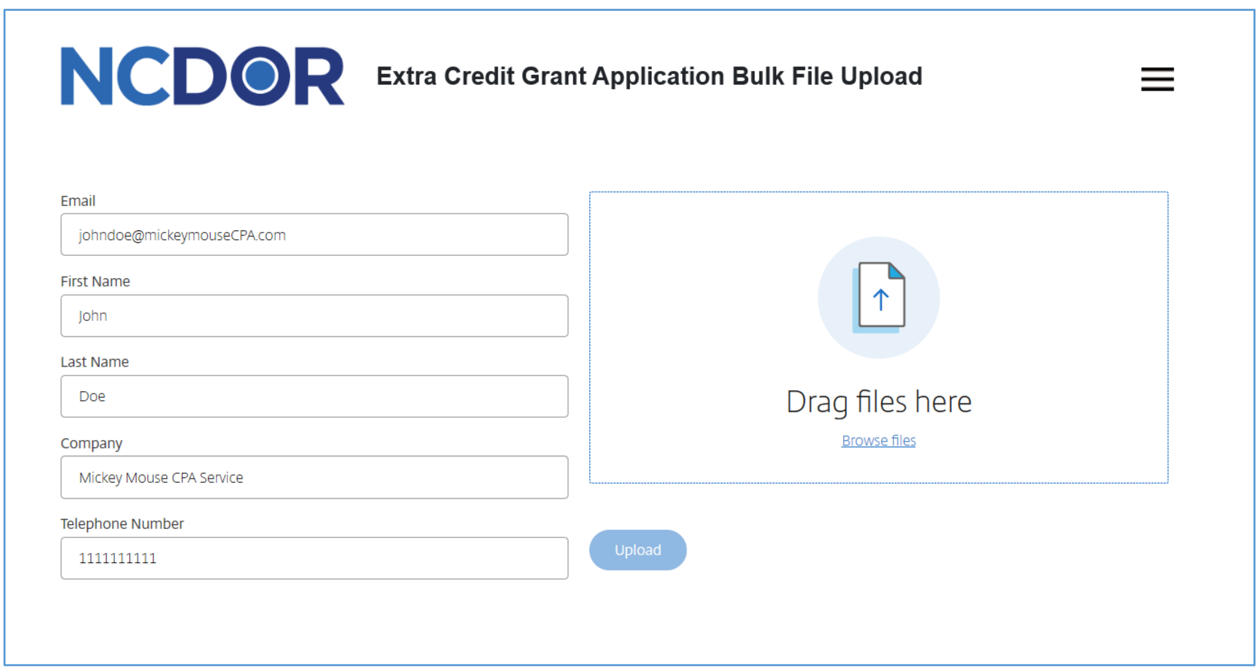
Step 3: Complete and save the file and follow the on-screen prompts.

Step 4: Upload the file and follow the on-screen prompts.

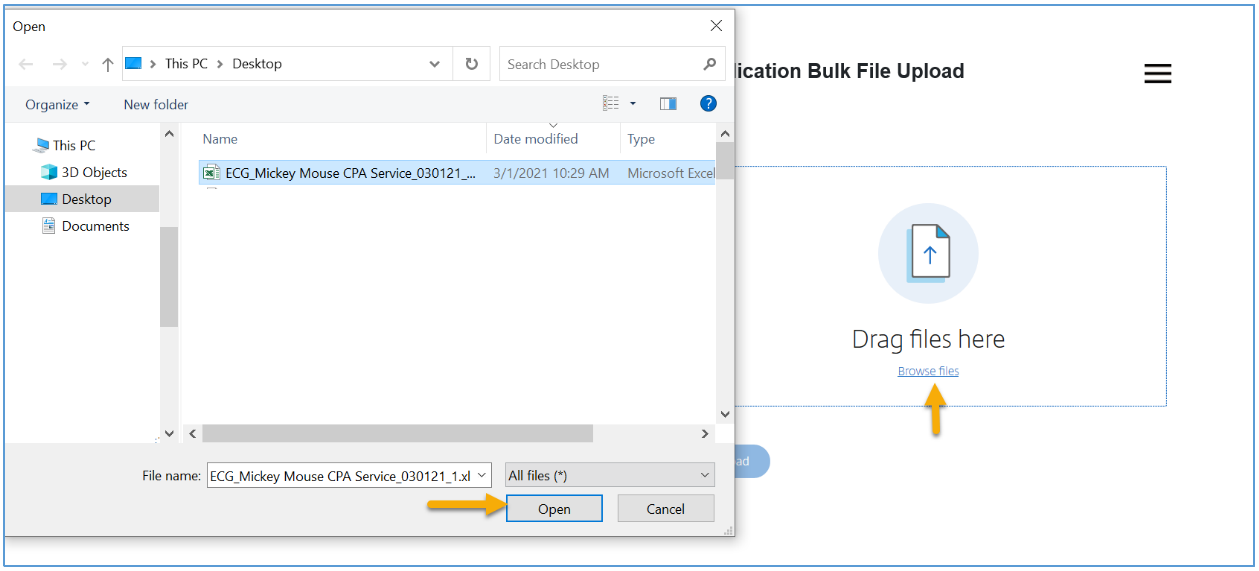
- **Attestation**: By uploading a completed file, you are declaring and certifying that you have examined this application and accompanying schedules and statements, and to the best of your knowledge and belief, they are true, correct, and complete, and all individuals included in this transmittal are eligible to receive a grant award under the Extra Credit Grant Program.

Step 5: You will receive an email confirmation that the file was received and will be notified if there are any problems with the file. Clients will receive the grant OR a letter explaining why the grant is denied.

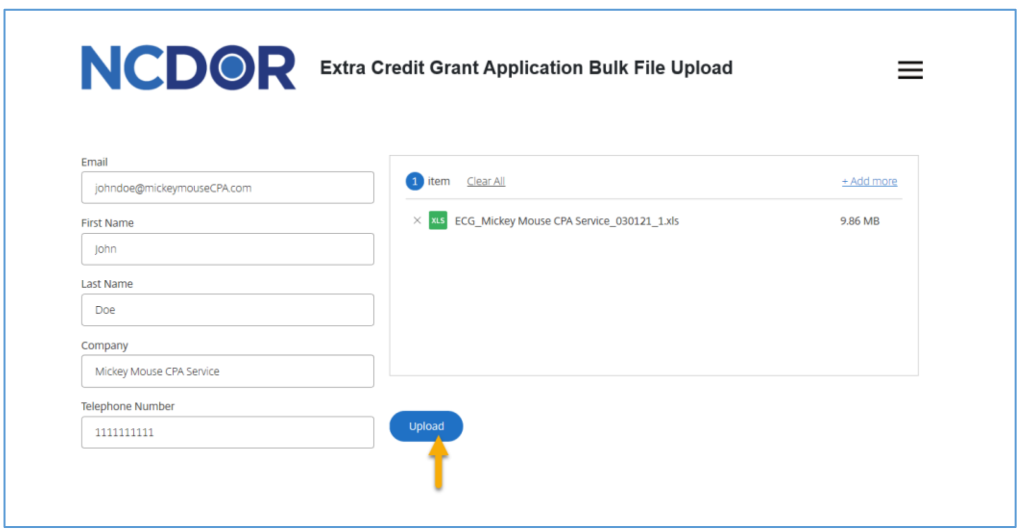
Step 8: Enter your email address, first and last name, business name, and contact phone number. You must provide a valid email address to receive a confirmation that your file uploaded successfully.



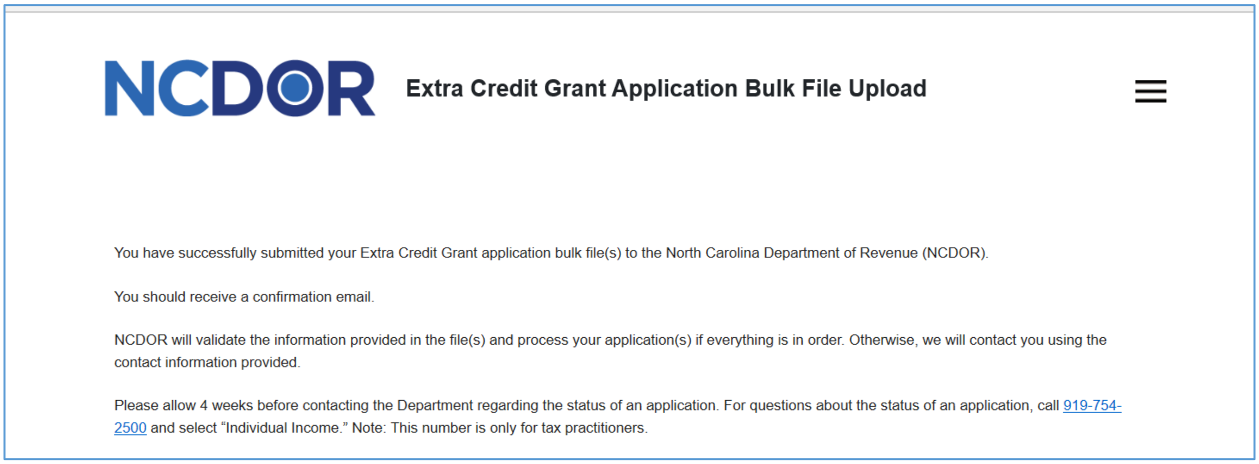
Step 9: Drag the completed application file to the drop box or browse your computer for the completed file.



Step 10: Click Upload.



Step 11: Upon completion of the upload, you will receive a message indicating your file uploaded successfully.



NCDOR Extra Credit Grant Application Bulk File Upload

You have successfully submitted your Extra Credit Grant application bulk file(s) to the North Carolina Department of Revenue (NCDOR).

You should receive a confirmation email.

NCDOR will validate the information provided in the file(s) and process your application(s) if everything is in order. Otherwise, we will contact you using the contact information provided.

Please allow 4 weeks before contacting the Department regarding the status of an application. For questions about the status of an application, call 919-754-2500 and select "Individual Income." Note: This number is only for tax practitioners.

Step 12: You will receive a separate email acknowledging receipt of the application file. You will be contacted within five business days or by April 5, whichever is later, if there are issues processing the file. Otherwise, allow four weeks for processing. Your clients will receive the grant OR a letter explaining why the grant is denied.

Note: The acknowledgment email will be sent from mail@sf-notifications.com. If you do not receive the acknowledgment email, check your junk or spam email folders.

Step 13: If you need to submit an application for additional clients, complete and submit a new application file by following steps 1 through 12 above. **Do not include previously submitted applications in the new file.**