

Tax Credit Certificate for Work-Based Learning Experiences Application Manual



OFFICE OF CAREER-TECHNICAL EDUCATION

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Introduction

The Office of Career-Technical Education (CTE) has designed the Tax Credit Certificate for Work-Based Learning (WBL) Experiences Application Manual to provide a step-by-step process for businesses to complete the Tax Credit Certificate Application. If you still have questions about completing the application after reviewing the document, please contact Program Administrator, Cadie Allen, at catherine.allen@education.ohio.gov.

[Please review eligibility requirements for employers and student employees.](#)

The 2022 Tax Credit Certificate for WBL Experiences application is in the OH|ID account. The 2022 application window is December 30, 2022 to February 1, 2023, as outlined in [Ohio Revised Code 5747.057](#).

The Office of CTE is responsible for approving or disapproving a tax credit application within 60 days of submission.

Before beginning the application, each user needs an OH|ID and SAFE Account. [Visit the Department website for more information.](#)

Once an OH|ID and SAFE account is created, the Department will reach out to the business to collect additional information via Microsoft forms in order to upload the survey and make the application available to the user.

When the application is ready to be completed, the user will receive an email notification. (Figure 1)

Permission added to your OH|ID account



Enterprise Identity
To: Tang, Grace

[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Your OH|ID account was added to the following group:

- **State Agency:** EDU
- **Application Name:** Tax_Credit_Application
- **Application Description:** Access tax credit application

This email is for notification only; no action is required.

Not sure why you received this email? This could be the result of a request you made or a system-wide change. For more information, reach out to your IT point of contact or the State of Ohio agency listed above.

Please note, this email comes from a no-reply email address. Replies to this email are not monitored.

Figure 1

Starting a Tax Credit for WBL Experiences Application

1. Login to the [OHID](#) system. (Figure 2)
2. Prior to beginning an application, please have available:
 - WBL Tax Credit Documentation
 - Work-Based Learning Agreement
 - Amount of Student Compensation

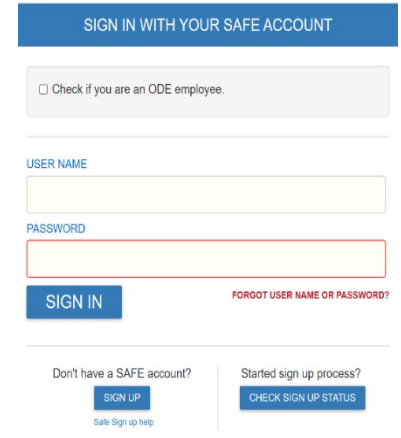


Figure 2

3. In the My Sites and Applications list, select the Tax Credit Application tile. (Figure 3)

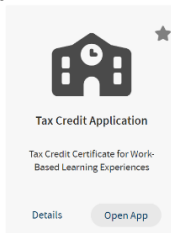


Figure 3

Note: If the Tax Credit Application tile is not available, please ensure [the process of creating an OHID and SAFE account](#) is complete.

4. Under Organization, check that the correct business is selected. Then, click the Tax Credit for Work Based Learning Experience. (Figure 4)



Figure 4

- Click Search. Select the IRN and name of the business highlighted in blue (Example in Figure 6: 020360- Test Tax Credit Company). (Figure 5 and Figure 6)

The screenshot shows a search interface with the following fields and options:

- Module:** Monitoring
- Program Selected:** Tax Credit for Work Based Learning Experience
- Basic Search / Export Results** tabs
- Program Period:** Tax Credit for Work Based Learning Experience Year - 2022
- Overall Completion Status:** Any
- Consultants:** (Empty dropdown)
- District IRN/Name:** 020360 - Test Tax Credit Company
- Surveys:** Any
- Sponsoring Organization IRN/Name:** (Empty dropdown)
- Survey Completion Status:** Any
- Results Count:** 20
- Sort Order:** IRN
- Buttons:** Search, Reset

Figure 5

Search Results

Returned 1 Results Filter:

Organization	Program Period	Number Of Surveys	Overall Completion Status	Sponsor	Consultants	District
020360 - Test Tax Credit Company	Tax Credit for Work Based Learning Experience Year - 2022	2	Not Started			

Figure 6

Employer Survey

6. Select Start Survey for the 2022 Tax Credit for Work Based Learning Experience **Employer** Survey. (Figure 7)

Survey Plan(s)	Started Date	Last Updated	Completion Status	
2022 Tax Credit for Work Based Learning Experience Employer Survey				Start Survey
2022 Tax Credit for Work Based Learning Experience Student Survey				

Figure 7

7. Ensure the Employer Section is selected. (Figure 8)

Sections Hide Sections

* Required Recommended EPR

*** Employer**

Certificate

Figure 8

8. Complete Questions 1 and 2 with business information and the details for the business's point of contact. (Figure 9)

Questions i

2022 Tax Credit for Work Based Learning Experience Employer Survey

Prev Section Employer EPR Next Section

Questions * Required Recommended

1 2 3 4

Group Name Employer Details

* Question 1

Employer Information

Employer Name: tax credit test 1
 Address Line 1: 25 S Front St
 Address Line 2:
 City: Columbus
 State: Ohio
 ZIP: 43215
 Please enter the employer FEIN or SSN without dashes: 123123123

Documents | Comments | Communication

* Question 2

Employer Contact

First Name: Owner
 Last Name: One
 Phone: 1231231234
 Email: abc123@gmail.com

Documents | Comments | Communication

Figure 9

9. Complete Question 3 and ensure all business owners are included. The Percentage of Ownership *must* equal 100%. (Figure 10)

- a. Hit +Add Row to add additional owners.
- b. If the business only has one owner, provide the owner's name and input percentage of ownership.
- c. Click Save to save entered ownership data.

* Question 3

Owner Details

Owner Name	Owner SSN	Percentage of Ownership	Action
Test	123456789	25.00	<input type="checkbox"/>
Test2	876858677	25.00	<input type="checkbox"/>

one
100 in
data.

Figure 10

Save

- 10. Select Yes to certify that the information provided in the application is complete and accurate and that the employer and employee are eligible for the Tax Credit Certificate for Work-Based Learning Experiences in adherence with Ohio Revised Code 5747.057. (Figure 11)

I certify that to the best of my knowledge the information provided in this application is complete and accurate and that the employer and employee are eligible for the Tax Credit Certificate for Work-Based Learning Experiences in adherence with Ohio Revised Code 5747.057.

Yes

0 Documents 0 Comments 0 Communication

Figure 11

- 11. Go back to the top of the page to submit the Employer Survey. Under completion status, select Submitted from the drop-down menu and click the save button to the right of the drop-down menu. (Figure 12)

Survey List

Survey Plan(s)	Started Date	Last Updated	Completion Status
2022 Tax Credit for Work Based Learning Experience Employer Survey	12/02/2022	12/02/2022	Started Save
2022 Tax Credit for Work Based Learning Experience Student Survey			

Figure 12

Student Survey

- Next, select the 2022 Tax Credit for Work Based Learning Experience **Student** Survey. The Document ID numbers correlate with the Document ID number on the Work Based Learning Tax Credit Documentation. Check the Document ID to ensure the correct information is provided for each student. Click Add Tax Student, enter the Document ID and click Add New Tax Student. (Figure 13)

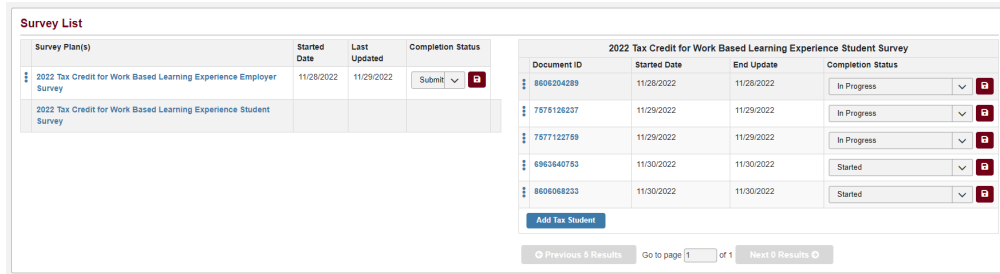


Figure 13

- To upload the Work Based Learning Tax Credit Documentation and the Work Based Learning Agreement, click Documents. Documents on File will pop up on the left side of the screen. Select +Add Documents. From the drop-down menu, select the type of document. Drag file or click to browse for files. Once both documents are uploaded, click Close Add Documents. (Figure 14)

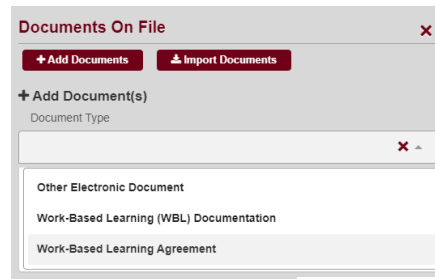


Figure 14

- Select Yes on Question 1 to indicate both documents have been uploaded. (Figure 15)

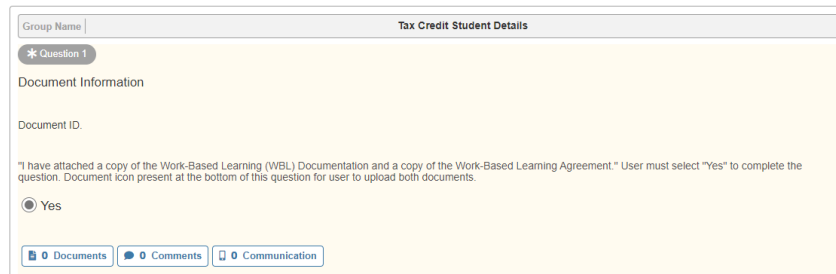


Figure 15

- Provide student information. Double check the information provided is for the correct student. (Figure 16)

* Question 2

Student Demographic Information

Student First Name Student Last Name Student Date Of Birth

Please enter the last 4 digits of Student's SSN Graduation Date

Figure 16

16. On Question 3, provide the CTE Program Name listed on the Work Based Learning Tax Credit Documentation. (Figure 17)
- Select the type of employment [Registered Pre-Apprenticeship, Registered Apprenticeship or Other (e.g., Paid Internship)].
 - Provide the work start date and work end date for 2022. **The work start date cannot begin before 03/23/2022 (effective date for the tax credit).** If the student currently is employed, provide 12/31/2022 as the work end date.
 - Provide the total compensation paid to the student between the work start and work end dates. (03/23/2022-12/31/2022)

* Question 3

Program Data

CTE Program Name.
See Work-Based Learning (WBL) Documentation

Type Of Employment

Registered Pre-Apprenticeship Registered Apprenticeship Other (e.g., Paid Internship)

Work Start Date Work End Date Total Compensation Paid \$

Figure 17

17. On Question 4, select Yes to certify that the information provided in the application is complete and accurate and that the employer and employee are eligible for the Tax Credit Certificate for Work-Based Learning Experiences in Ohio Revised Code 5747.057. (Figure 18)

Question 4

Student Tax Credit

Tax Credit Allowed

I certify that to the best of my knowledge the information provided in this application is complete and accurate and that the employer and employee are eligible for the Tax Credit Certificate for Work-Based Learning Experiences in adherence with [Ohio Revised Code 5747.057](#).

Yes

Figure 8

18. Go back to the top of the page to submit the Student Survey. Under completion status, select Submitted from the drop-down menu and click the save button to the right of the drop-down menu.

2022 Tax Credit for Work Based Learning Experience Student Survey				
	Document ID	Started Date	End Update	Completion Status
	8606204289	11/28/2022	11/28/2022	In Progress
	7575126237	11/29/2022	11/29/2022	<div style="border: 1px solid gray; padding: 2px;"> In Progress Submitted Cancel Request </div>
	7577122759	11/29/2022	11/29/2022	In Progress
	6963640753	11/30/2022	11/30/2022	Started
	8606068233	11/30/2022	11/30/2022	Started

[Add Tax Student](#)

(Figure 19)

Figure 19

19. If there is more than one eligible student employee, click Add Tax Student and repeat steps 12-18 until all student surveys are complete.

Application Review

20. Both the employer survey and student survey must be completed. The Ohio Department of Education has 60 days to review and respond to each application. Each student survey will be approved individually for the convenience of the business.
21. Please monitor email for requests for additional or clarifying information. Email also will be utilized to notify businesses of approval or disapproval.

Download Certificate

22. Once an application is approved, repeat steps 1 to 6 to login back into the application system.
23. Select the Certificate Section. (Figure 20)

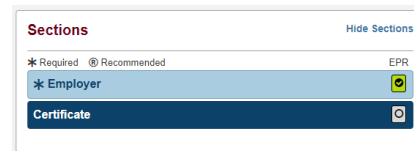


Figure 20

From here, businesses will be able to see the total tax credited and download the tax credit certificate. Users will be notified when their tax credit amount has been calculated and the certificate is ready for download.