

Guide Book for Using the San Jose Enterprise Zone Online System

Draft Version #2

Posted November 11, 2012

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Introduction

All eligible employees must receive a voucher in order for an Enterprise Zone business to receive a hiring tax credit. The City of San Jose is transitioning from a traditional paper process to one that allows for voucher applications to be submitted through the online vouchering system. The system receives application submittals, processes and returns the determination through the system.

In order for a voucher application to be submitted, the following steps must be completed:

- Registration of Agent (this is either a San Jose Enterprise Zone company or Agent acting on behalf of a San Jose Enterprise Zone company)
- Registration of a business and Enterprise Zone business location

As the City transitions to this new process, there are invariably going to be questions that arise in using the system. The intent of this Guidebook is intended to provide an overview of how the San Jose Enterprise Zone online vouchering system functions and works. While the manual is intended to make clear how to use the online system it is not exhaustive in nature. If at anytime you are experiencing problems you can contact the Enterprise Zone manager.

In addition, if you have suggests or edits please also provide them to the Enterprise Zone manager.

Sincerely,

John Lang
City of San Jose
408-535-8178
john.lang@sanjoseca.gov

Common Terminology

Dashboard: This is the main landing page when you log into the system after you have become a registered agent. The Dashboard provides summary information and a quick status on voucher(s) in process. You can also look up associated companies, application numbers, invoices numbers, etc.

Account: The account area is divided into three sections, **business, entity** and **location**. All the information in the Account section pertains to business entities which are subsequently associated with Enterprise Zone based business locations.

Agent Company: This can be a contracted company that provides tax advisory services or an actual Enterprise Zone based company. The agent company is the contracted company or an eligible San Jose Enterprise Zone company that is actually submitting the voucher applications.

Agent: The individual(s) that is requesting the voucher is considered the Agent of the business for vouchering purposes. The individual will be submitting voucher applications either on behalf of a San Jose Enterprise Zone company (a traditional CPA or tax consultancy firm) or work for the actual San Jose Enterprise Zone company.

Agent Types:

Administrator: This is an individual that either oversees the voucher process for the San Jose Enterprise Zone company or the contracted company (a traditional CPA or tax consultancy firm). The administrator can establish or remove user accounts.

When a company Administrator leaves a company they should designate another user as Company administrator and ask the New Administrator to disable the old administrator.

The administrator also assigns responsible agents (User(s)). This helps the workflow for bigger companies so applications in "Problem" or "Denied" will get routed to the correct agent.

Users: These are team members with a CPA firm or San Jose Enterprise Zone company that can enter applications for the company. This user type cannot delete other users associated with the Agent's company.

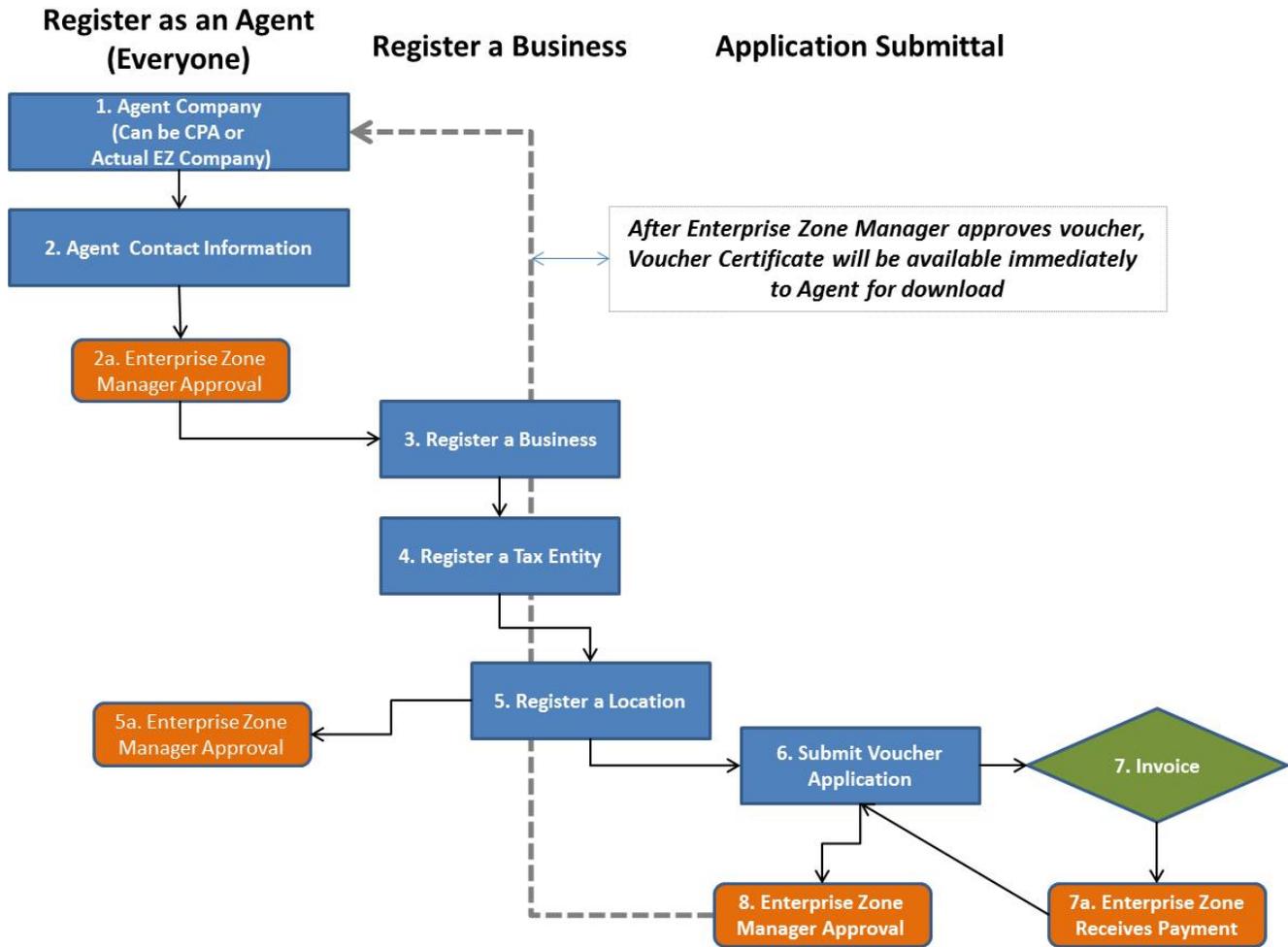
Business/Business Detail: This is the headquarters or parent company information for the potential San Jose Enterprise Zone company. The address provided with the Business Detail can be either the Enterprise Zone eligible address or a headquarters address.

Entity/Tax Entity: This is where the Federal Tax Identification Number (FEIN) and North American Industry Classification code (NAICS) is provided for the business. Since large corporations may have different tax entities within the parent company, Agents can set up multiple tax entities if needed. If there is only one tax entity (FEIN) for multiple locations then only one tax entity will need to be established.

Location: This is the qualifying San Jose Enterprise Zone eligible location. If a company has multiple Locations within the designated Enterprise Zone boundaries then each eligible location should be entered as a separate location.

San Jose Vouchering Online Outline

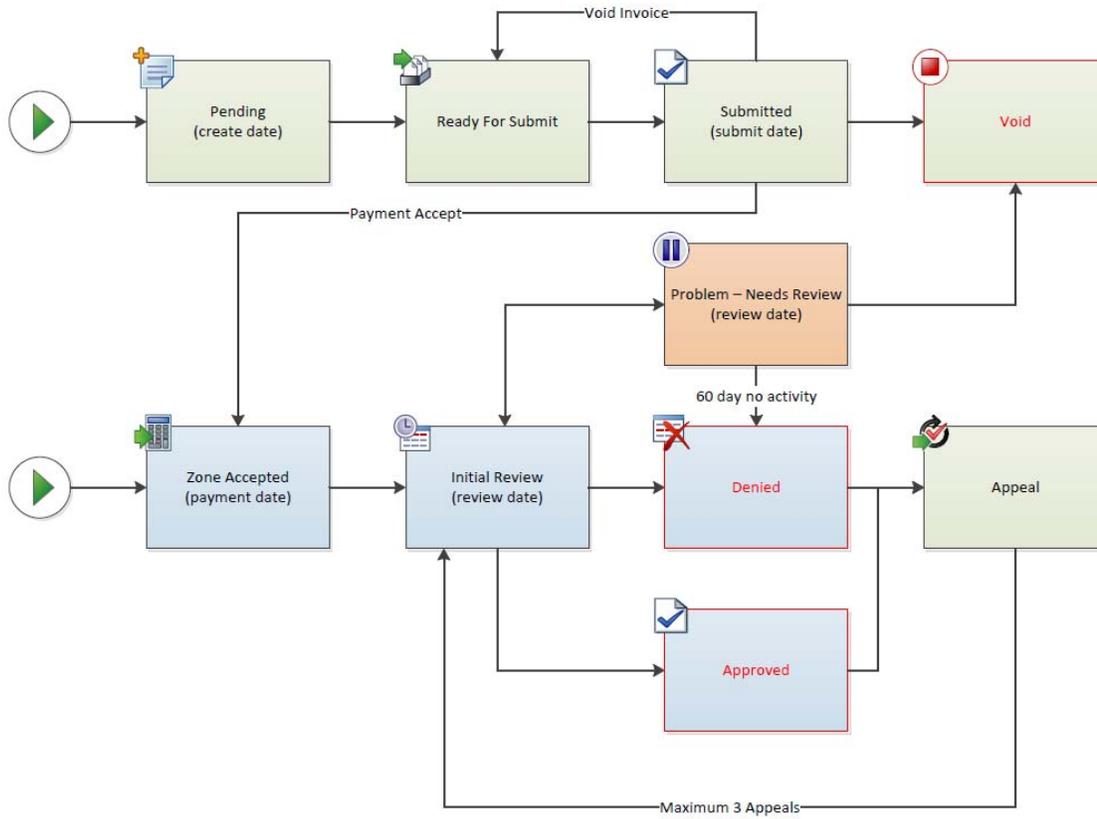
We will take you through a series of steps that will allow you to submit voucher request(s) directly to the City of San Jose in a paperless environment.



The processing fee payment should be included with confirmation and/or invoice and mailed to the following:

John Lang
Enterprise Zone Manager
City of San Jose
200 E. Santa Clara Street, 17th Floor
San Jose, CA 95113

Outline of Approval Process



Detailed Step Up process with Screenshots

To Get Started click "Start"

Welcome to the San Jose Enterprise Zone On-line Vouchering Tool.

Vouchering Application Processing System
The Voucher Application Processing System is an online web-based solution set up by the City of San Jose to help businesses take advantage of the benefits related to the California Enterprise Zone (CAEZ) Hiring Credit. To claim the CAEZ Hiring Credit, Qualified Businesses must obtain a voucher certificate before claiming the CAEZ Hiring Credit. This online system allows representatives of the businesses to file applications and receive the results (i.e. Voucher Certificate) in an electronic and paperless environment.

START

Register as an Agent
Prepare application with documentation
Submit to Enterprise Zone
Receive results electronically

Enterprise Zone Area
The Enterprise Zone (EZ) area is the specific geographic area identifying the qualified area where a business must be located to qualify for the benefits under the California EZ program. Please be aware that Oakland has an expired and active EZ area.

Expired San Jose EZ area Active San Jose EZ area

Targeted Employment Area
The Targeted Employment Area (TEA) relates to one of the EZ qualification categories. It is a resident of a TEA). Businesses who hire individuals with their home residence at the time of hire in this specific geographic area may qualify for the CAEZ Hiring Credit.

Target Employment Area Street List Target Employment Area Map

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Click on “Become an Agent”

The screenshot shows the top navigation bar with the City of San Jose logo and a banner image. Below the banner, there are two main sections: 'Become an Agent' and 'Agent Login'. The 'Become an Agent' section features the text 'first time users Sign up here' with a small icon of a person and a document. The 'Agent Login' section includes input fields for 'Username' and 'Password', a 'Login' button, and a link for 'Forgot your Username or Password?'. At the bottom of the page, there is a copyright notice: '© 2012 CTI Technologies, LP All Rights Reserved.'

If you are a San Jose business that is submitting your own vouchers, provide your business contact information. If you are an Agent working on behalf of a company please provide your company contact information.

*****PLEASE NOTE that throughout the System there are some required fields, you will notice required fields have a very thin Redline around the input cell. You should just fill in the required fields.***

The screenshot shows the 'Register New Company' form. The form has several input fields with red borders indicating required fields. The fields are: Company Name (Long Consulting), Website, Address1 (200 East Santa Clara Street), Address2 (17th Floor), City (San Jose), State (CA), Zip (95113), County (Santa Clara), Phone ((408) 535-8178), and Verify Code (BSib). Below the form are 'Back', 'Reset', and 'Next >>' buttons. At the bottom of the page, there is a copyright notice: '© 2012 CTI Technologies, LP All Rights Reserved. 1.2.0 1.1.15.'

Provide Agent contact login detail and contact information. Please note your login and password information for future reference.

Register New Agent
Company: Lang Consulting

Agent Information

First Name : John Last Name : Lang
Email : econrod-2003@gmail.com Title : Manager
Phone : (408) 535-6176x Fax : (408) 292-6719x
Address 1 : 200 E. Santa Clara Street Address 2 : 17th Floor
City : San Jose State : CA Zip Code : 95117

Login Information

Username : econrod-2003@gmail.com Verify Code : 6m7Y
Password : ***** Confirm Password : *****
Security Question 1 : What is the name of your close friend? Security Answer 1 :
Security Question 2 : Where does your nearest sibling live? Security Answer 2 :
Back Reset Next >>

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After you click “next” you will receive the following notice.

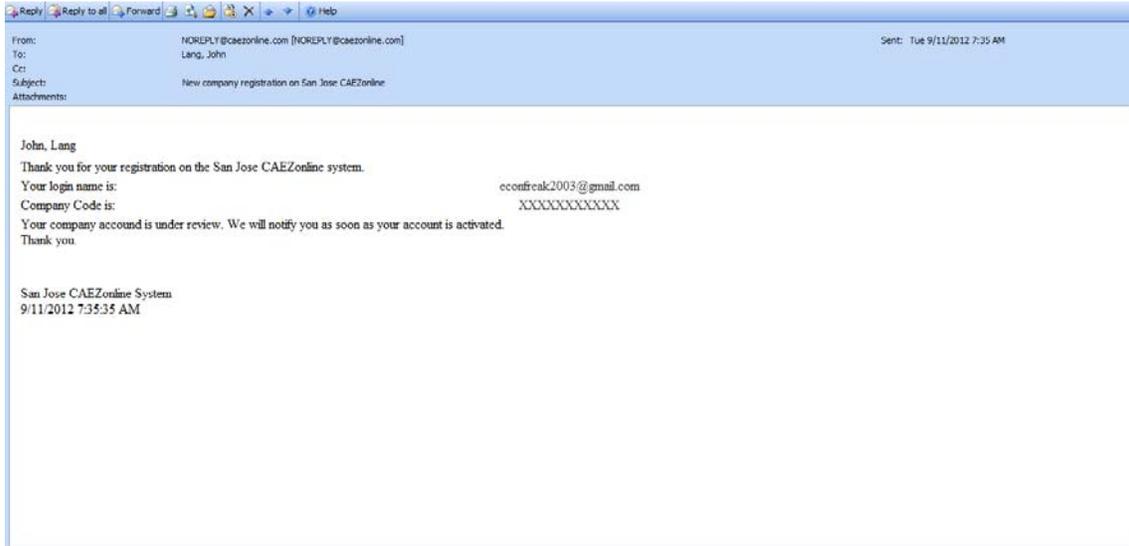


NOTICE: Once you have set up an Agent account, the Enterprise Zone manager MUST approve and activate the account. The Enterprise Zone manager checks the system daily for new Accounts.

You will receive a couple of emails from the online vouchersing system.

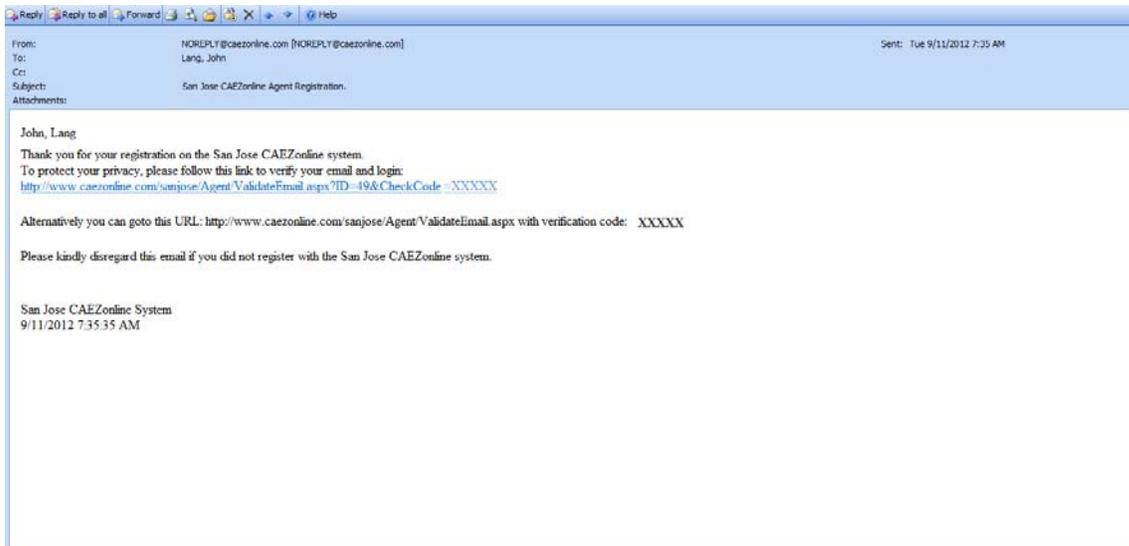
Email #1

The first email you receive will notify you that your Account is under review and it will also provide you a 10 digit company code.



Email #2

The second email you will receive is asking you to validate your email address and provides a link to do so. If the link does not work, you are given instructions as well as a unique 5 digit number to enter to validate your email.



If you click on the link in the email you will be redirected to the San Jose Online vouchersing system.

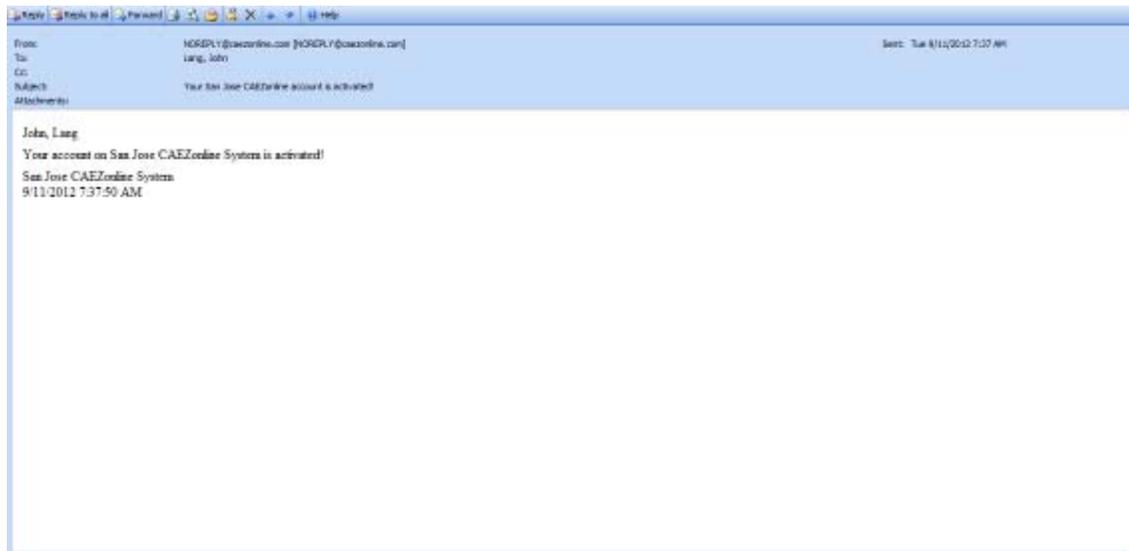
After clicking the click you will receive the following validation screen.



NOTICE: Once you have set up an agent Account, the Enterprise Zone manager MUST approve and activate the account. The Enterprise Zone manager checks the system daily for new Accounts.

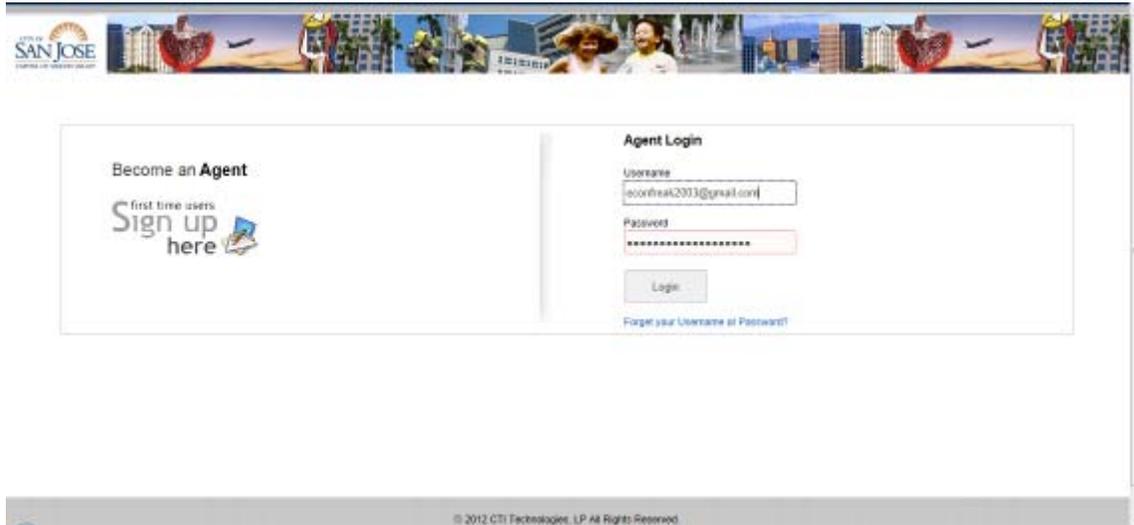
Email #3

Once the Enterprise Zone Manager approves your Account you will receive a third email letting you know that your account has been activated.

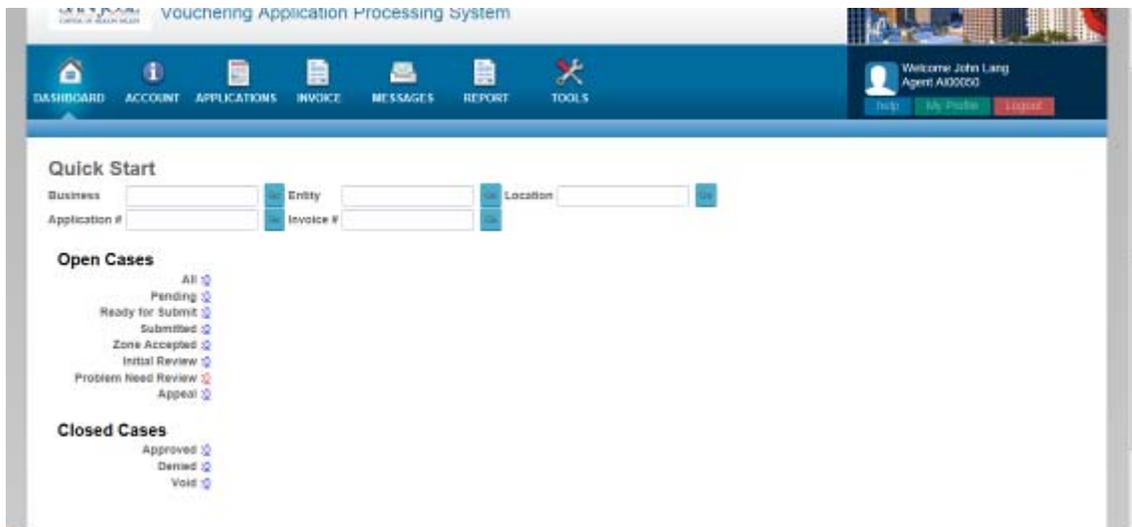


Once you receive the approval email, you will then be able to set up your clients business or your business for vouchering, please log in using your approved account.

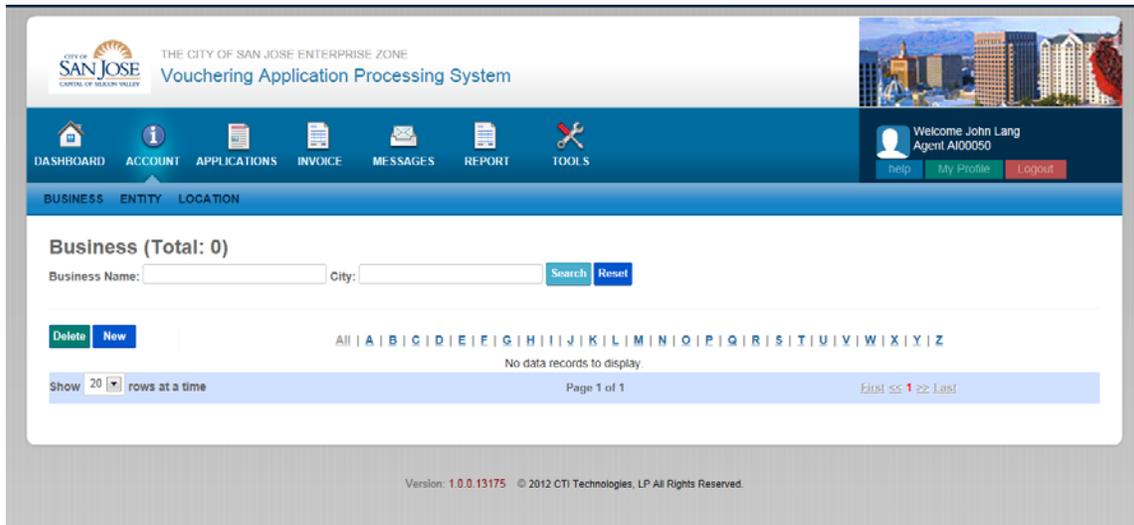
SETTING UP THE ELIGIBLE ENTERPRISE ZONE BUSINESS



When you login for the first time you will see the following landing page, this is the Dashboard



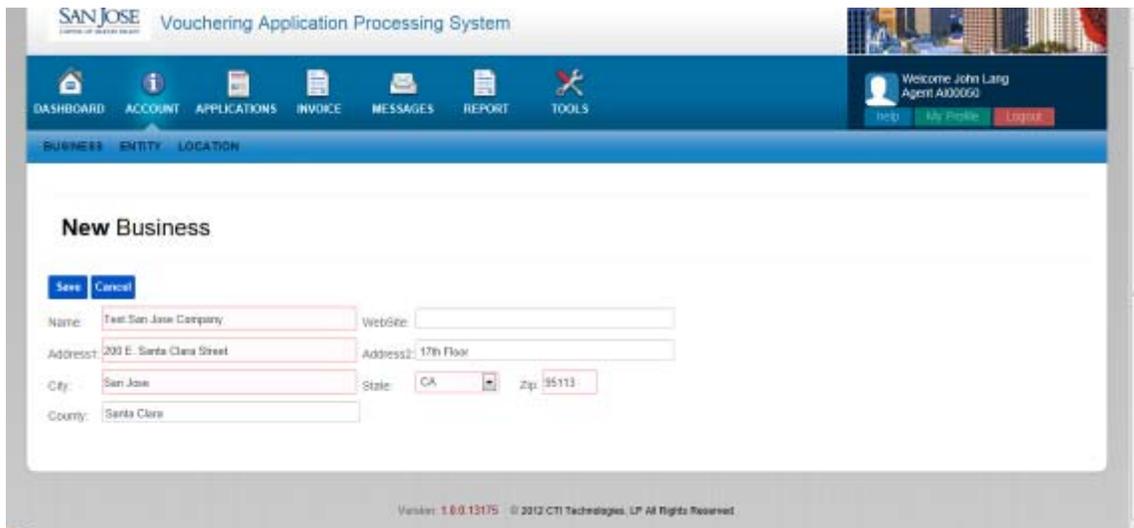
NEXT SELECT [iAccount](#)



The next steps will take you through setting up a business. There are three steps. The steps are Business>Entity>Location.

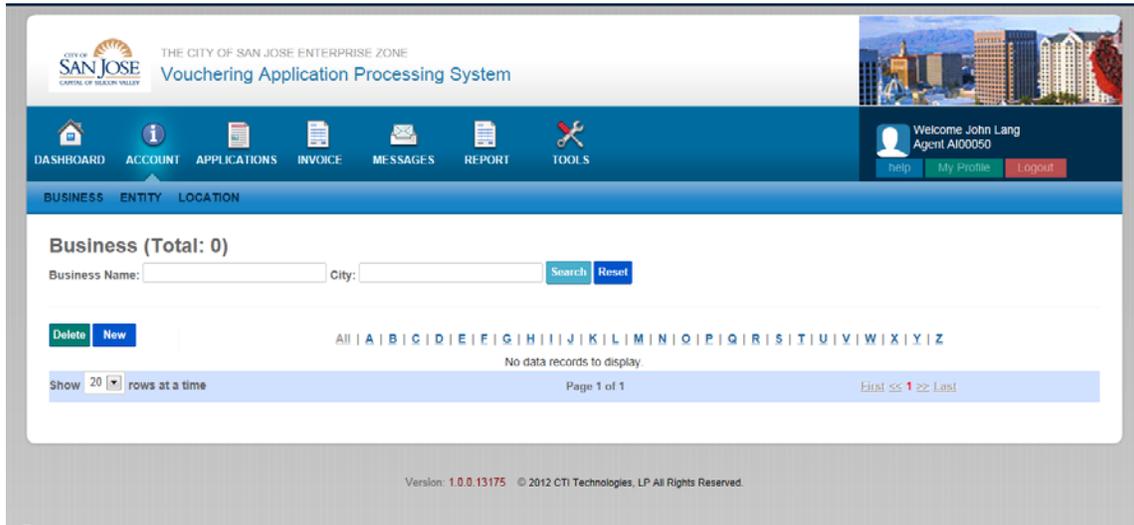
Click on “New” under the Business Tab

The information for this tab should be the parent company information for a business. This information is not necessarily the Enterprise Zone address.

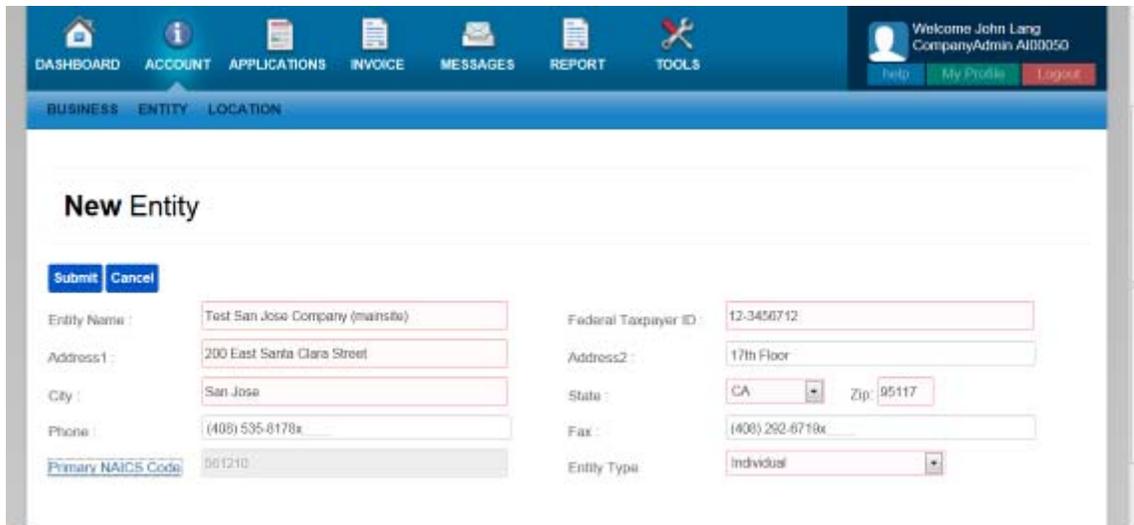


Once you have identified the new business the next step is to identify the tax entity. Some businesses have multiple tax entities (FEINs) and the next step allows for the Agent to set up multiple tax entities if needed.

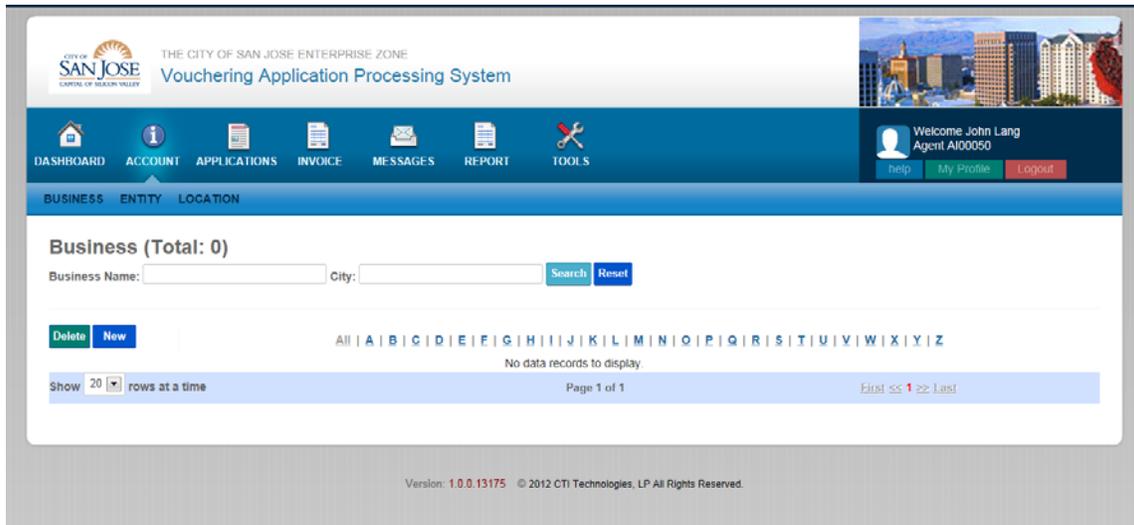
Click **Entity** and then **NEW**



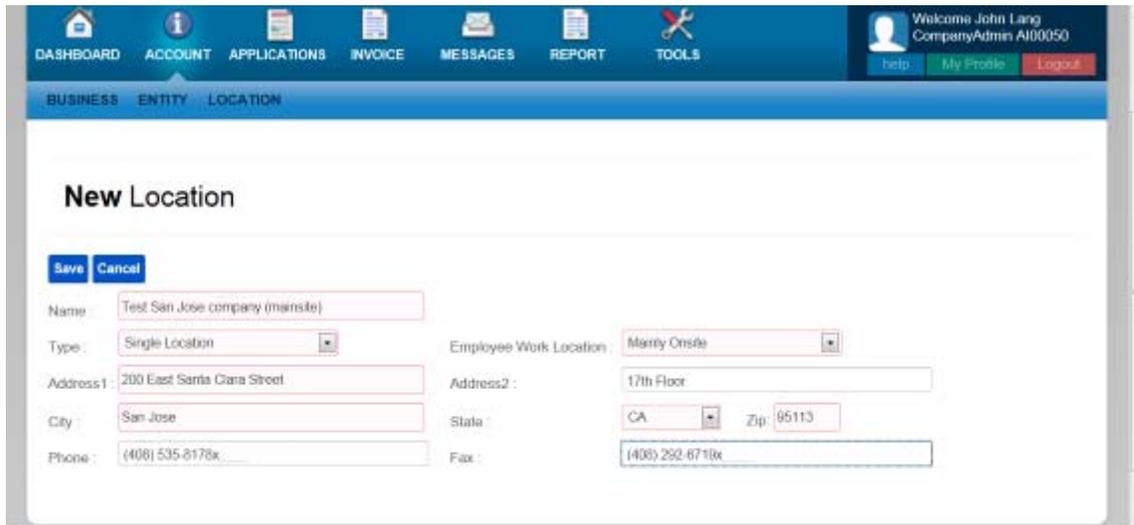
After Selecting "New" the screen below establishes the FEIN number and associated NAICS code.



The next step is to set up a location(s). These locations are supposed to be the Enterprise Zone eligible address(es)



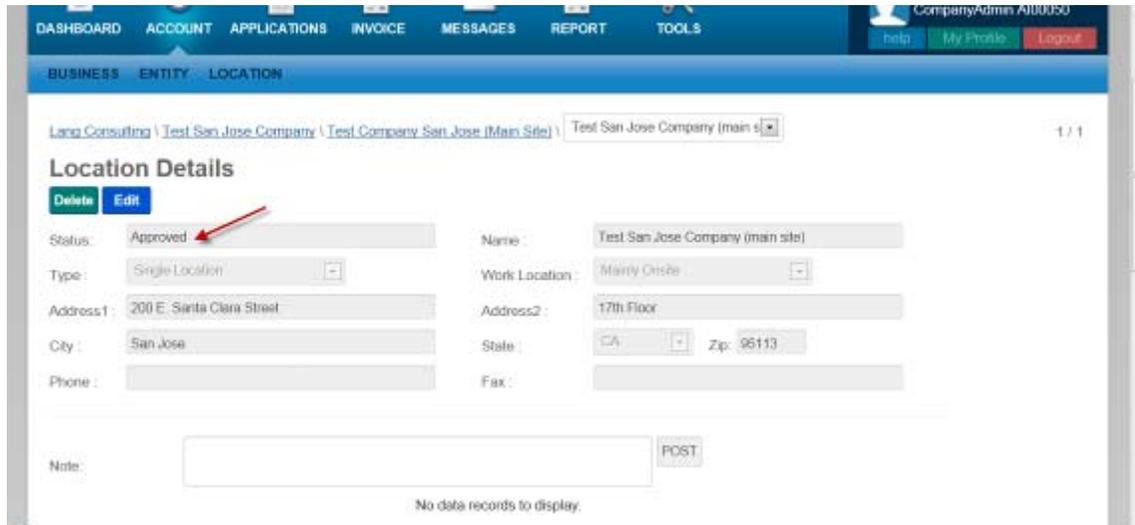
Select "Location" then "New"



The location information should be a business that is located within San Jose's Enterprise Zone boundaries.

NOTICE: Once you have set up a New LOCATION, the Enterprise Zone manager MUST approve the Location. The Enterprise Zone manager checks the system daily for new locations. Until a LOCATION is set up you will not be able to submit applications.

Once a Location has been approved, you can then submit voucher applications under the appropriate location(s). In addition, once a Location has been approved you will see approved under the Location information.



SUBMITTING APPLICATIONS

Paperless Environment

With this new process, the voucher application will automatically be completed based on the responses captured during the electronic process. The application will automatically be completed as part of the process and you will upload an electronic (i.e. PDF) file of the supporting documentation. Please note that the ONLY acceptable format allowed is PDF.

Please have the electronic PDF or hard copy supporting documentation files available when you begin the process.

Voucher Submissions are Limited to a Single Enterprise Zone Location

In order to reduce the possibility of errors with regards to the employee work locations, application submissions are limited by Location. For example, if you have a business with two San Jose EZ Locations for that business then you will need to complete the voucher submission process twice – once for each location.

Please have the applicant/employee information separated by EZ Business and EZ Location as you begin the process.

We give you two different methods for entering the voucher application data into the system:

Option 1:

Enter the employee information into the system by entering the employee information directly into the system one employee at a time. This approach provides for the highest degree of accuracy since it allows the user to focus more attention to each employee.

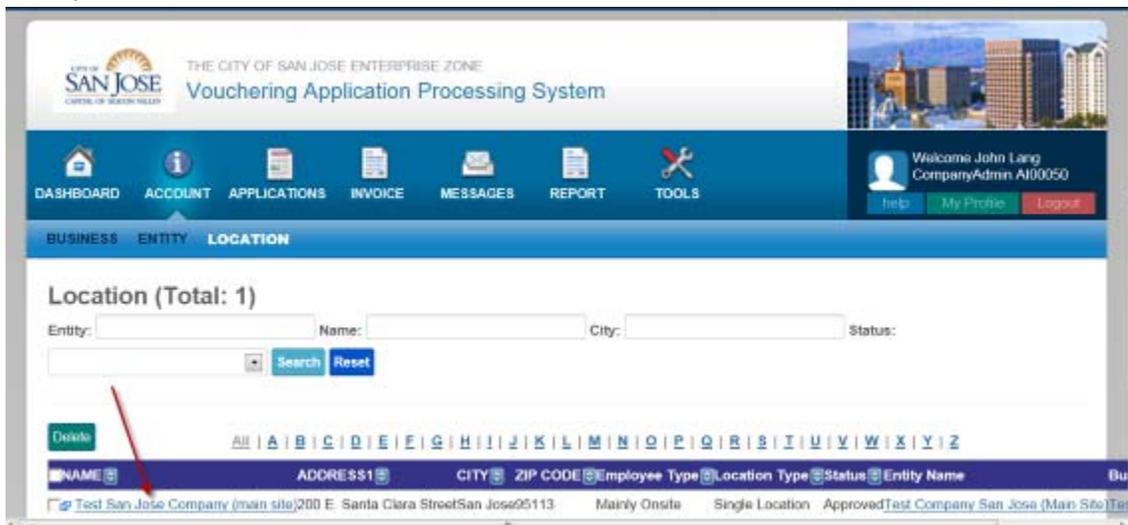
Option 2:

Completes the Microsoft template that contains the employee information for multiple employees and allows the Agent to upload the information directly into the system without going through the effort of entering one at a time. Although this approach provides for a quicker method of entering the information, the Agent should spend some additional time ensuring the information is accurate before uploading the information.

It is important to realize that the template is an Excel Workbook that contains special macros to assist the user in entering the information accurately. Only this template may be used – an Excel Worksheet that contains the same data headers will not work with the system. The required template can be obtained through the system during the voucher application submittal process.

Option 1 Detailed

Under Account, select Location. Any location you have set up should appear at the bottom of the screen. Then select that specific location (red arrow noted below).



After selecting the location you want to submit the application under you will see a screen similar to the one below.

The screenshot displays the 'Vouchering Application Processing System' interface. At the top left is the City of San Jose logo. The main navigation bar includes links for Dashboard, Account, Applications, Invoice, Messages, Report, and Tools. A user profile for John Lang is visible in the top right. The breadcrumb trail shows the path: Lann Consulting \ Test San Jose Company \ Test Company San Jose (Main Site) \ Test San Jose Company (main site). The 'Location Details' section contains a form with the following fields: Status (Approved), Name (Test San Jose Company (main site)), Type (Single Location), Work Location (Mainly Onsite), Address1 (200 E. Santa Clara Street), Address2 (17th Floor), City (San Jose), State (CA), Zip (95113), and Phone. Below the form is a 'Note' field with a 'POST' button. The 'Applications' and 'Location Document' sections both show 'No data records to display.' and include pagination controls for 10 rows at a time, Page 1 of 1, and First/Last navigation buttons.

Under Application heading under Location, select New. A similar screen below will appear. Because the business information has already been set up, the next steps focus on providing information for the eligible employee.

The next step will focus on submitting individual vouchers (a batch upload will be demonstrated starting on page 27)

THE CITY OF SAN JOSE ENTERPRISE ZONE
Vouchering Application Processing System

Welcome John Lang
CompanyAdmin A100050

New Application Wizard

Business Information

Business Information	Entity Information	Location Information
Business ID : B1000012 Business name : Test San Jose Company Address : 200 E. Santa Clara Street City : San Jose State : California	Entity ID : E1000906 Entity name : Test Company San Jose (Main Site) Contact Job Title : Address : 200 East Santa Clara Street City : San Jose State : California Zip : 95113 Phone : (408) 535-8178x_____	Location ID : L1001120 Location name : Test San Jose Company (main site) Street Name : 200 E. Santa Clara Street City : San Jose Zip : 95113 Phone :

Select the method you would like to use for application submission :

Fill in form

Multiple Employee Upload

Number of Applications :

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The following steps show loading a single voucher (or submitting a voucher one at a time)

New Application Wizard

Business Information

Business Information	Entity Information	Location Information
Business ID : B1000012 Business name : Test San Jose Company Address : 200 E. Santa Clara Street City : San Jose State : California	Entity ID : E1000006 Entity name : Test Company San Jose (Main Site) Contact Job Title : Address : 200 East Santa Clara Street City : San Jose State : California Zip : 95113 Phone : (408) 535-8178x	Location ID : L1001120 Location name : Test San Jose Company (main site) Street Name : 200 E. Santa Clara Street City : San Jose Zip : 95113 Phone :

Select the method you would like to use for application submission :

Fill in form
 Multiple Employee Upload

Number of Applications :

Next

Select the number of applications you plan to submit. The example following is based upon 1 application

Below is a sample Target Employment Area resident. You will notice that by selecting the eligible category you will be reminded about the appropriate documentation needed for the respectful eligible category. In the case of the TEA resident, the attachment will be a PDF file of a Driver's License.

PLEASE NOTE: When you first enter an employee they are AUTOMATICALLY designated as "Initial". After you go through the screens below and you are comfortable with the information loaded into the system YOU WILL NEED to change each employee from INITIAL to READY FOR SUBMIT. You do this by clicking on their application and under APPLICATION DETAIL you should see a but label "Ready For Submit"



THE CITY OF SAN JOSE ENTERPRISE ZONE
Vouchering Application Processing System



DASHBOARD
 ACCOUNT
 APPLICATIONS
 INVOICE
 MESSAGES
 REPORT
 TOOLS



Welcome John Lang
CompanyAdmin A100050

[help](#)
[My Profile](#)
[Logout](#)

New Application wizard

Enter Employee Data

Save & Continue
Cancel

The 1 of 1 Employee(s)

First Name :	<input type="text" value="John"/>	Middle Name :	<input type="text"/>
Last Name :	<input type="text" value="Lang"/>	SSN (Last 4 Digits) : ## - ## - 9999	<input type="text" value="9999"/>
Home Address 1 :	<input type="text" value="200 East Santa Clara Street"/>	Home Address 2 :	<input type="text" value="17th Floor"/>
City :	<input type="text" value="SAN JOSE"/>	State :	<input type="text" value="CA"/>
Zip Code :	<input type="text" value="95113"/>	Phone :	<input type="text" value="(408) 535-8178x"/>
Job Title :	<input type="text" value="Economist"/>	Starting Wage :	<input type="text" value="0"/>
Hire Date :	<input type="text" value="1/1/2012"/>	Termination Date :	<input type="text"/>
Position Type :	<input type="radio"/> New <input checked="" type="radio"/> Existing		Priority : <input type="text" value="Standard"/>
Comments :	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>		

Category :

Instruction:

Section	Instructions
Section A	Address Verification
Section B	IRS Form W-4
Section B	I-9
Section B	ID / Drivers License
Section B	ID / Passport
Section B	ID / Alien Registration Card
Section B	ID / Birth Certificate

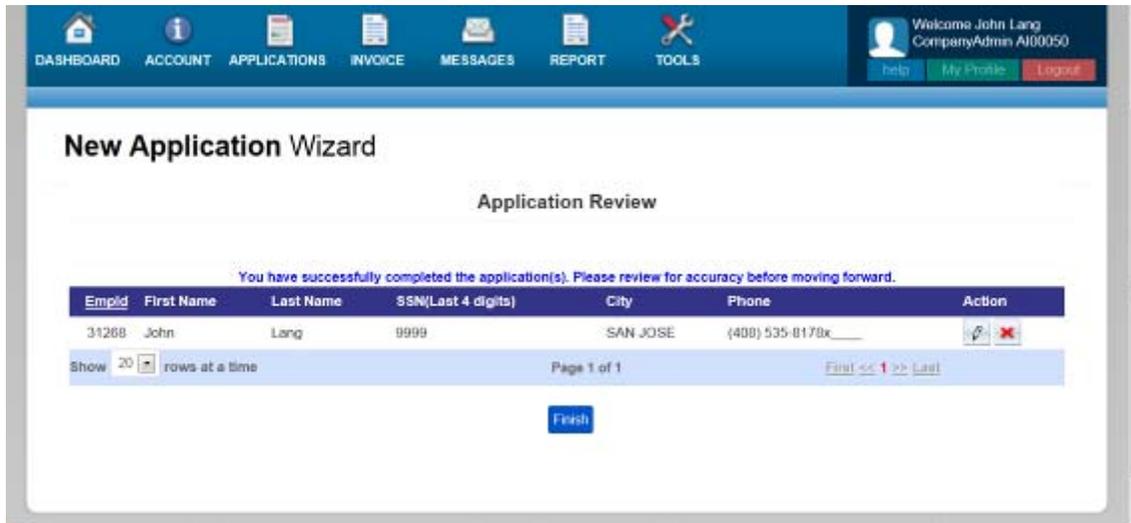
Upload Supporting Documentation files

Document Type: C:\Users\JCLaptop\Docur Browse... Upload

Save & Continue
Cancel

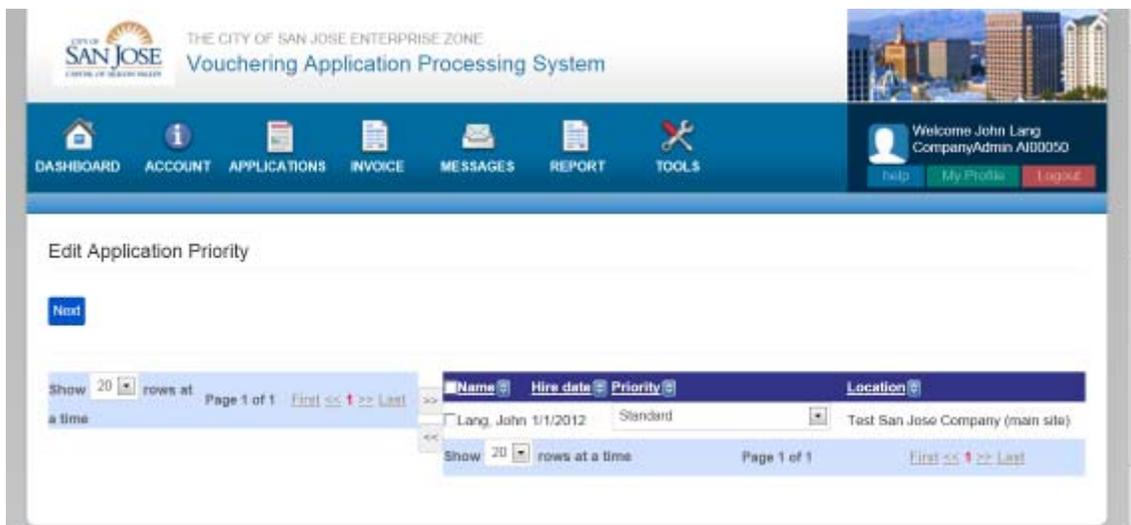
Version: 1.0.0.13267 © 2012 CTI Technologies, LP All Rights Reserved.

After hitting Save and Continue (screen shoot above) you will be taken to the following page. At this point you can edit the employee information by selecting the Pencil icon to the right or delete the entry by selecting the Red X.



If the information is correct select Finish.

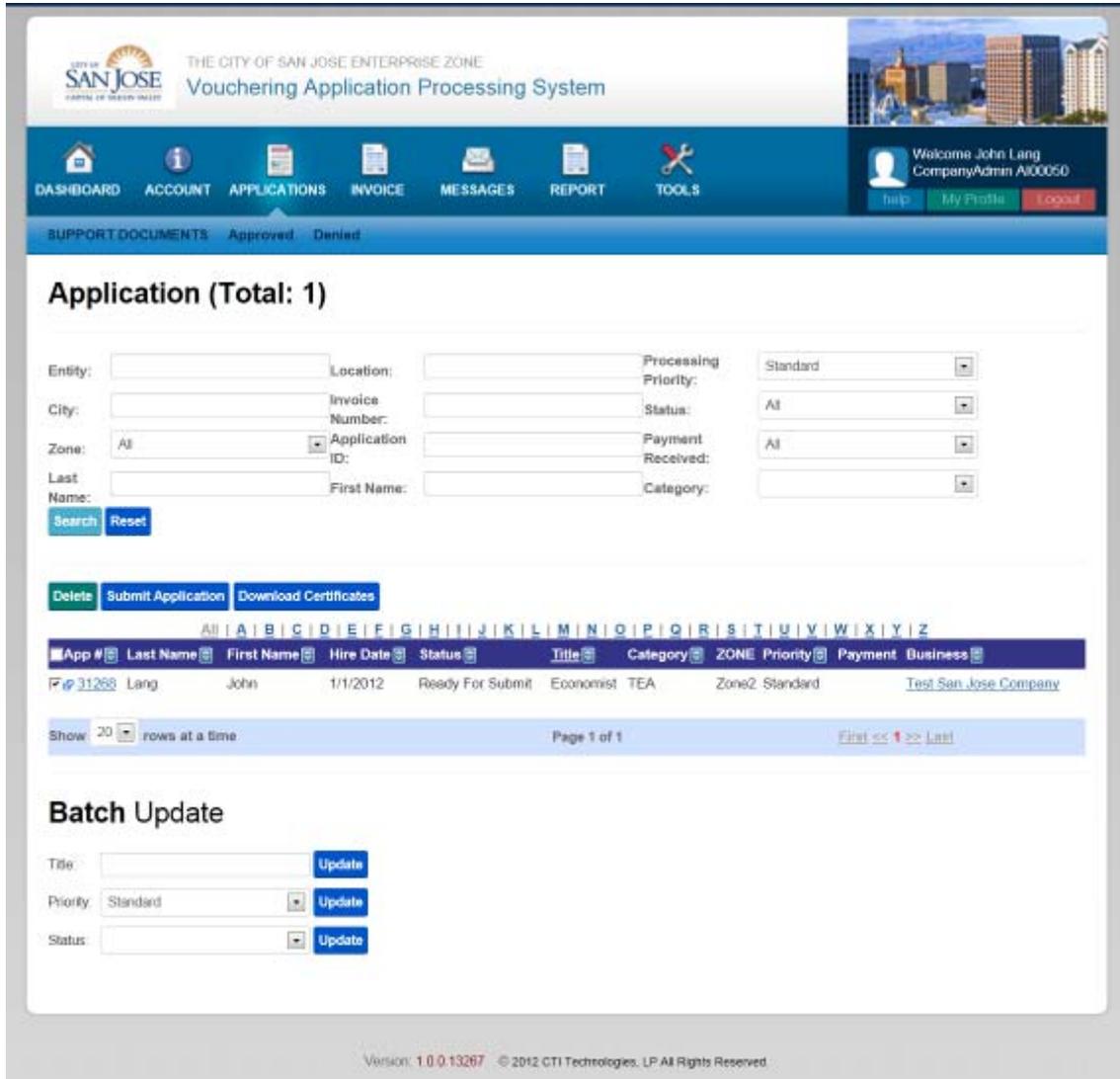
The following page will appear. At the present time the current fee structure does not allow for expedited review and therefore a special priority. Click Next.



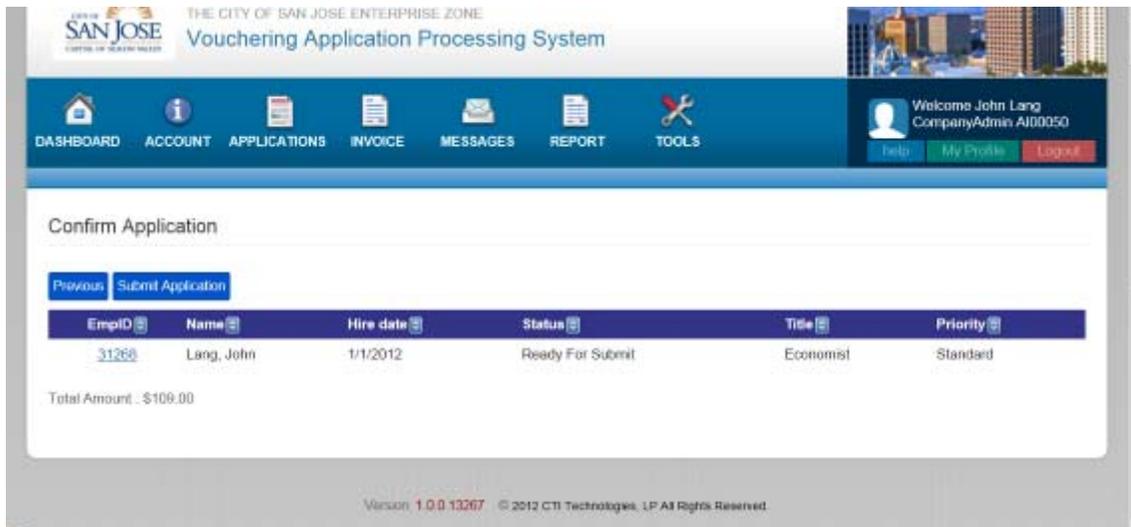
The next step will allow you to electronically submit the application as well as simultaneously generate a payment invoice.

PLEASE NOTE: When you first enter an employee they are **AUTOMATICALLY** designated as “Initial”. After you go through the screens below and you are comfortable with the information loaded into the system **YOU WILL NEED** to change each employee from **INITIAL** too **READY FOR SUBMIT**. You do this by clicking on their application and under **APPLICATION DETAIL** you should see a but label “Ready For Submit”

In order to submit the application and generate the invoice. Select the check box to the left of the employee name listed under applications. After selecting the check box, click on “submit application”

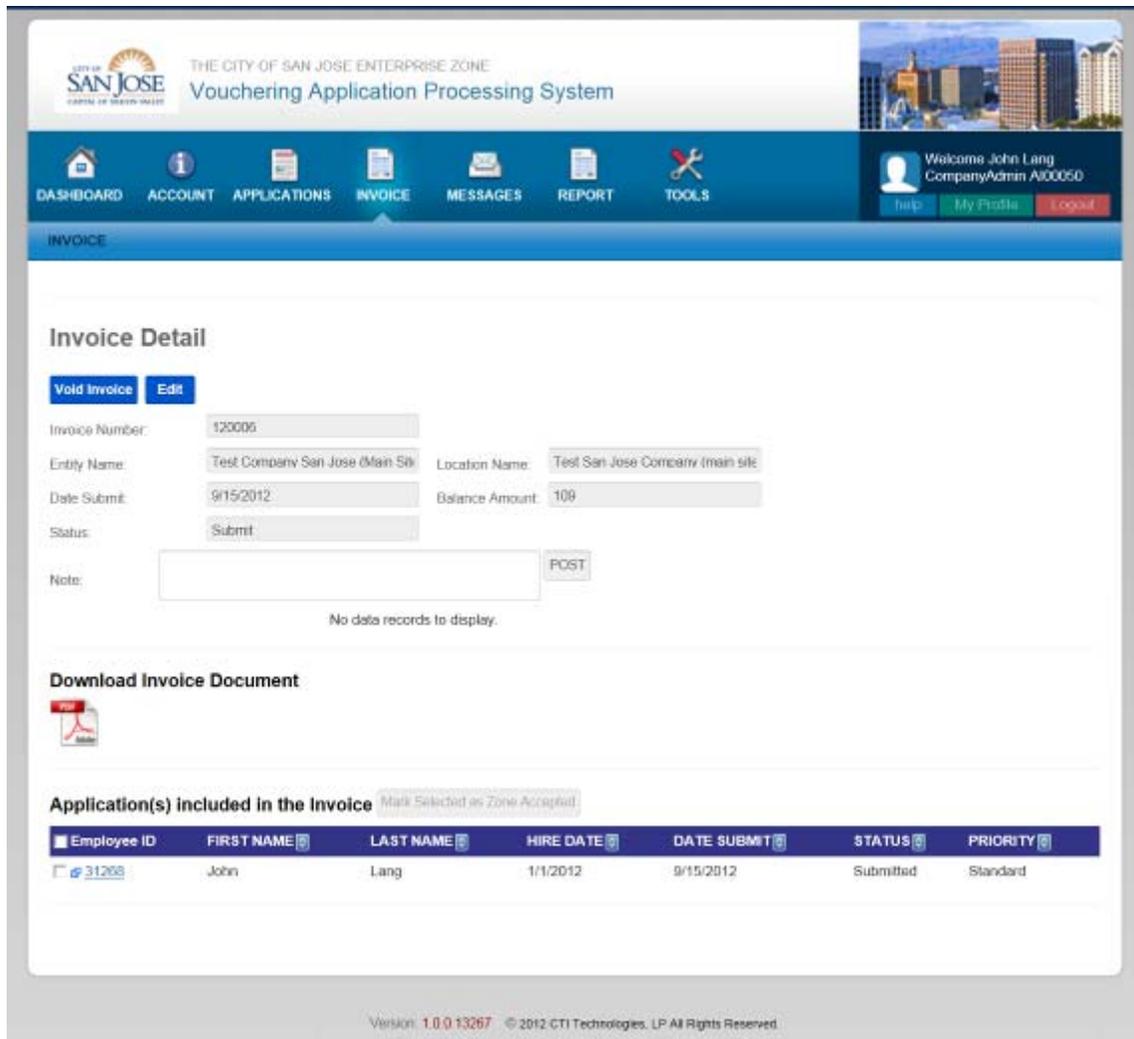


Upon clicking “submit application” you will be redirected to a page confirming your desire to submit the application.



If you are ready to submit the application, click “submit” application.

You will now be able to generate an invoice.



Once you get the screen above, you can click on the PDF icon that will display the invoice. Please use the PDF invoice as a reference for your payment payment. Please make sure to include the invoice number as a reference on your payment submittal to the City of San Jose. Below is a sample invoice PDF.

INVOICE CONFIRMATION



San Jose Office of Economic Development
Enterprise Zone Administrator
200 E. Santa Clara St, 17th Floor
San Jose, CA 95113

DATE :	3/15/2012
INVOICE # :	120006
CONFIRMATION # :	C-120006

Entity Name :	Test Company San Jose (Main Site)
Location Address :	Test San Jose Company (main site)
Number of Applications :	1

Processing fee payment status : Mail Payment

Payment of voucher application process fee:
If you did not pay the required application processing fee through the system then please send the payment along with a copy of the invoice generated by the system to the City of San Jose Enterprise Zone Coordinator.

Submission of Required Documentation:
If you did not send the required documentation electronically through the system then please print a copy of this confirmation page and mail it along with the documentation to the City of San Jose Enterprise Zone Coordinator.
The supporting documentation and processing fee payment should be mailed to:

Attn: John Lang
San Jose Office of Economic Development
Enterprise Zone Administrator
200 E. Santa Clara St, 17th Floor
San Jose, CA 95113

Please do not send cash. Only checks or money orders are acceptable.

Please be aware that your applications are not submitted for processing until all documentation and payments have been received. In addition, the 60,30 and 15 day processing time periods do not begin until all documentation and payments have been received.

Agent ID : AI00050

VOUCHER APPLICATIONS SUBMITTED FOR THE FOLLOWING APPLICANT(S)			
APPLICATIONID	APPLICATIONNAME	PRIORITY	AMOUNT
31206	Lang John	Standard	\$100.00
TOTAL			\$100.00

Please remit via us mail your payment to
John Lang
Enterprise Zone Manager
City of San Jose
200 E. Santa Clara Street, 17th Floor
San Jose, CA 95113

NOTICE: *Once you have reached this point, the next step is to remit payment to the City of San Jose. The Enterprise Zone manager will not be able to process any submitted voucher application without payment of application fees. In order for the Enterprise Zone manager to even see submitted applications, invoice and payment have to be recognized first. Once the manager receives payment and updates the invoice information as "Payment Received/Paid" the application will be viewable to the EZ manager. Most applications can be processed within a day. Please note that if no payment is received within 60 days the application will automatically be denied.*

Option 2 Detail (Batch upload of applications)

Information to be provided in Version #3 of Guide.