NYC

Finance

A User Guide to

Commercial Revitalization/ Commercial Expansion Online Renewals

A step-by-step guide to help you complete the renewal application online

April 2015

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Introduction

This guide is designed to assist you with completing your CERP property tax abatement renewal form.

In the following pages, we provide a step-by-step manual with detailed explanations to help you navigate the Department of Finance's online renewal system and submit your renewal form with ease.

We also have a Frequently asked Questions (FAQs) document, which you can find on our website click here for CRP renewals and click here for CEP renewals.

You may always request help by contacting us here or contacting 311.

Helpful Hints for Using the System

Required Fields

Throughout this system you will be asked to provide information and answer questions. There are certain fields that are required to be completed in order to move between screens or submit a renewal application.

If at any time you try to submit information by clicking Confirm or Submit Form and there is an error, you will see the message below. Fields that are blank or filled-in incorrectly will be highlighted in blue like this:
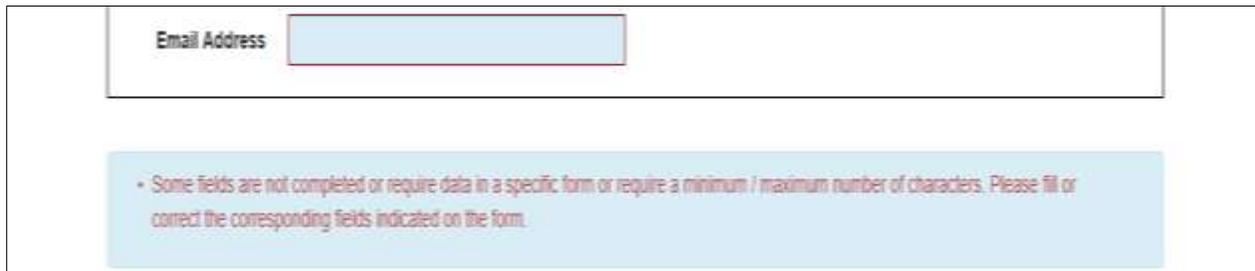
Once you have made the necessary corrections, you will be able to submit and move to the next section.
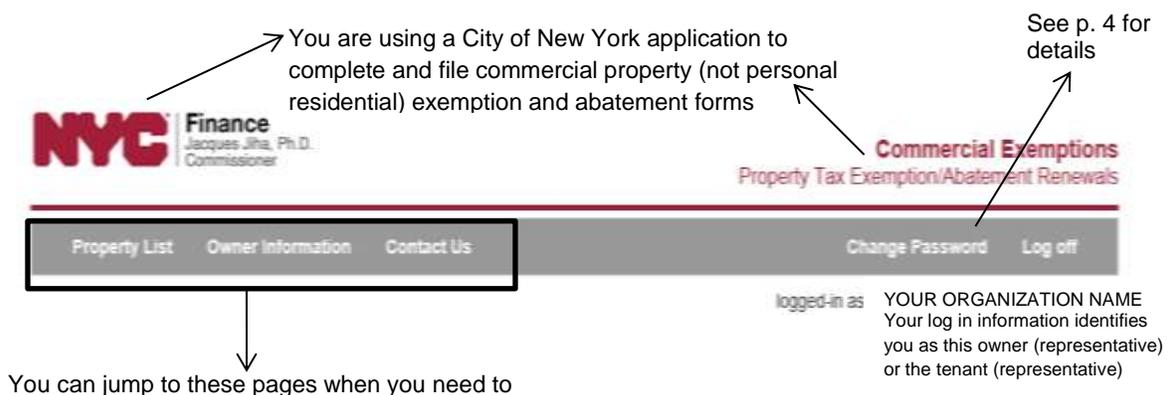
Text Boxes

A text box will appear if you answer YES to a question. Text boxes require 25 characters. You may have to expand on your answer if you get an error message.

Time Out

Like many online applications, if you have no activity for one hour, you will lose all of your information, so be sure to submit or save your form if you plan to be away from your computer.

Navigating the Website

The grey banner that is at the top of each page contains important pieces of information and allows you to jump to different pages at any time.

The grey bar allows you to:

- Jump to the Property List to see the CERP application that requires a renewal

- Jump to Owner Information so you can see what user information you confirmed for the application's owner (representative)/tenant (representative) contact information.

- Jump to Contact Us if you have questions

- Jump to Change Password if you want to change it

- Click Log off when you are ready to exit the application. All of your saved work can be completed or accessed when you log in again

Log in – Screen 1

On the Welcome page, you will be asked to enter your User ID and password to log in. The User ID and password can be found in the letter you received in May. User IDs and passwords are case-sensitive, so enter them exactly as they appear.

<u>Helpful hint</u>: Be sure not to mistake "0" for "O" or "1" for "I"
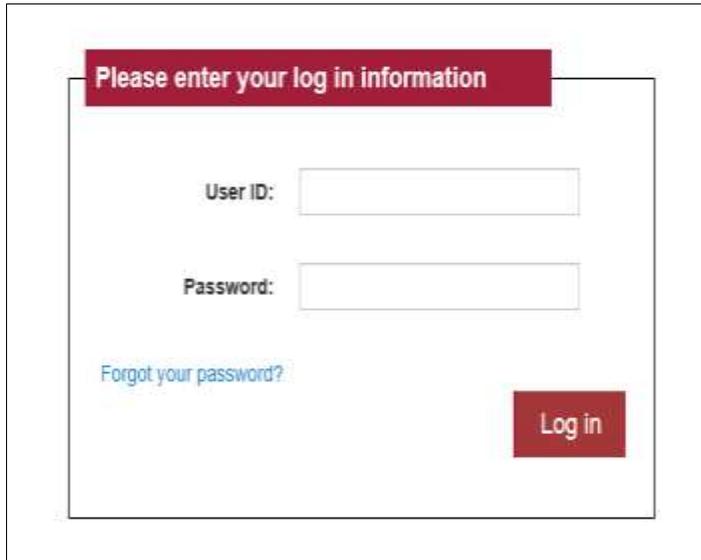
If you mistype your User ID or password, you will see an error screen like this:
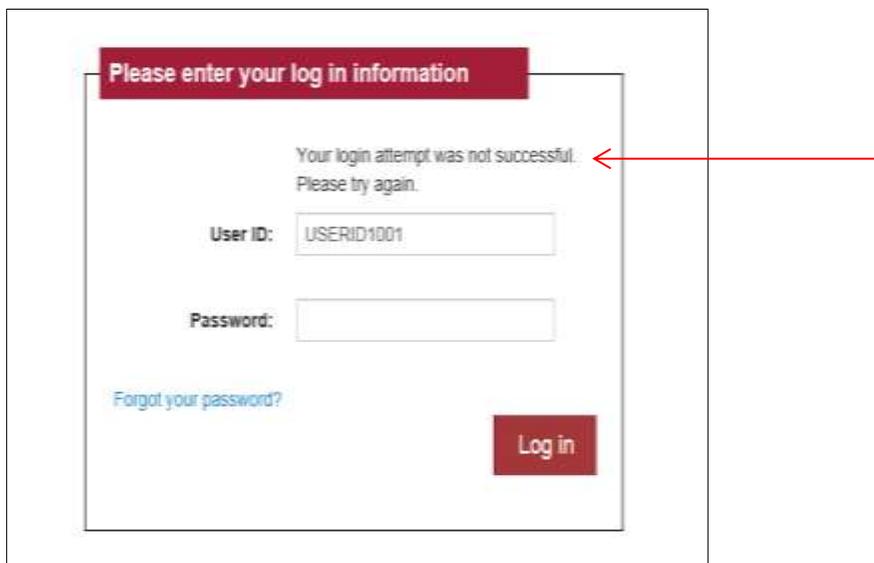
If this is your first time logging in, you will see Owner/User Information – Screen 2.
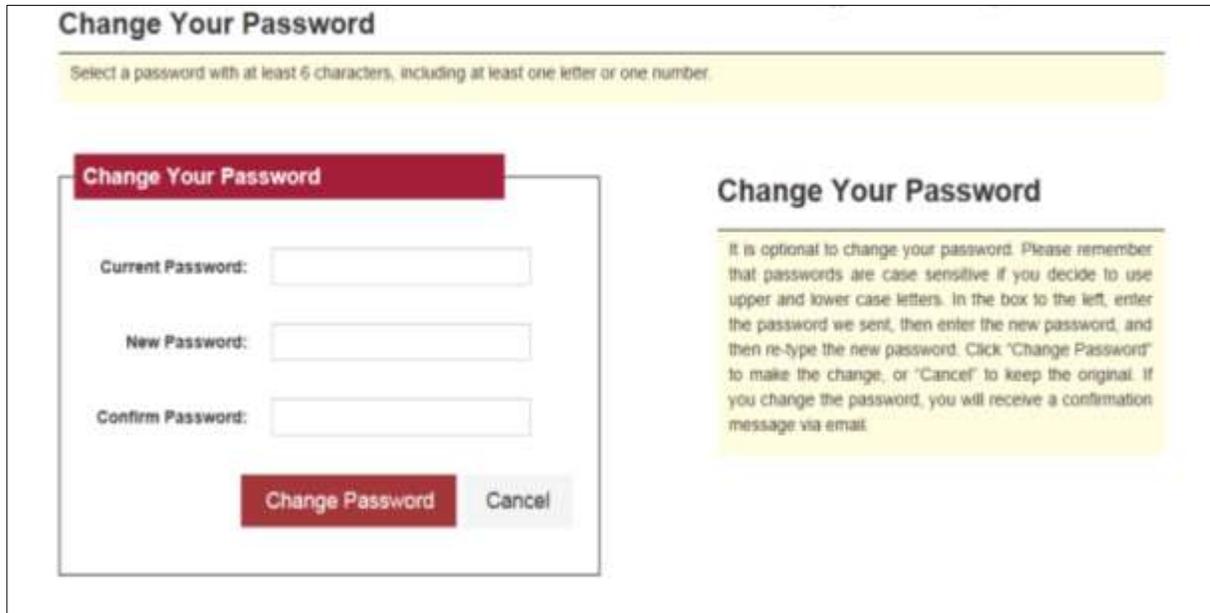
If you have logged in before, your next screen is Property List – Screen 3, so you may proceed to page 7.

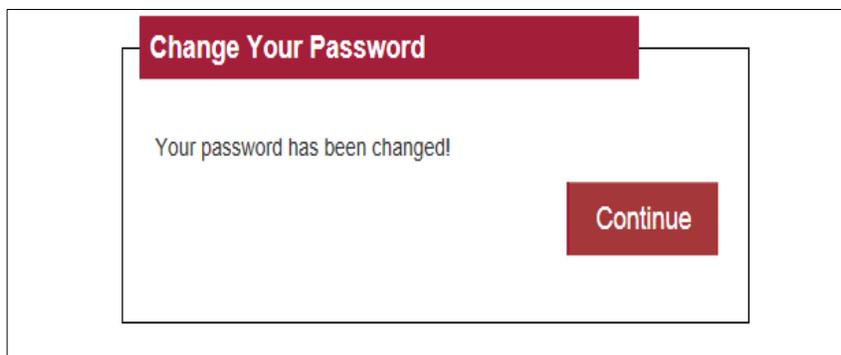**Change Password**

Click Change Password in the grey bar.

You will be asked to enter the password we sent, then type and confirm the new password that you want.

Helpful hint: The password must have 6 characters including one letter or number.

Click Change Password to keep the one you have entered. Click Cancel to keep the current password.

If your changes password is successful, you will see a screen like this:

You will also receive a confirmation email to the provided address that the password has been changed.

If your new password is not successful, you will see an error message like this:

Retype the password and confirm it and click Change Password again.

Profile Information – Screen 2

If this is your first time using this system, you will see information about your organization. Review and update this information as necessary. Click the Confirm button to proceed to the next screen.

If you have used this system before, you will be taken to the Property List.

Profile information can be updated at any time while you are logged in. You may also submit a form, logout and log back in another time if you need to update profile or contact information. The only field you cannot modify is the Name field within the Profile Information section. If the name displayed in this box is incorrect, contact us here. Keep in mind that this Name field identifies the company of the owner/tenant representative.

Helpful hint: Daytime Phone must be entered as 9 digits, no spaces or hyphens. You may enter a telephone extension if you have one.

Property List – Screen 3

This screen identifies the property and application receiving a CERP tax abatement benefit. All properties with benefitting CERP applications are required to complete a renewal form. If you have signed-on previously, you will arrive here after entering the User ID and password.
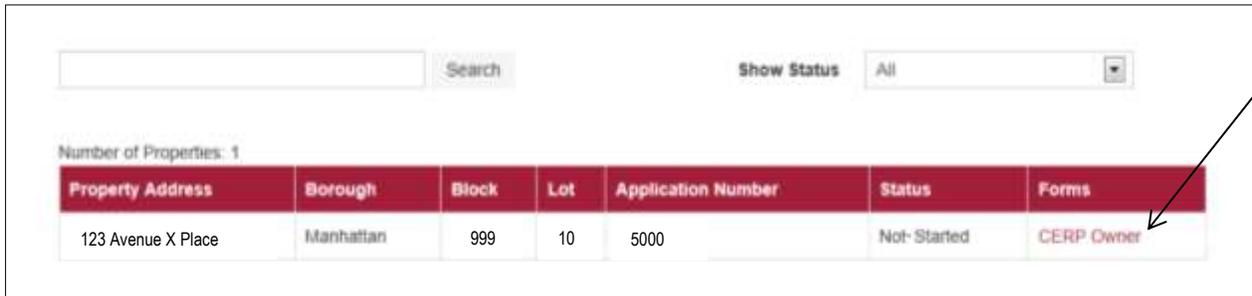

Understanding the Property List
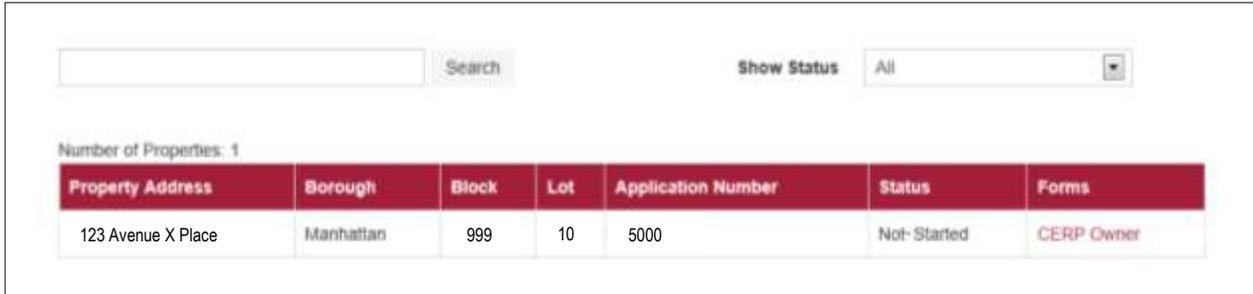
The identified row represents the property address (parcel receiving the abatement), the BBL, Application Number, Status and Type of Form.
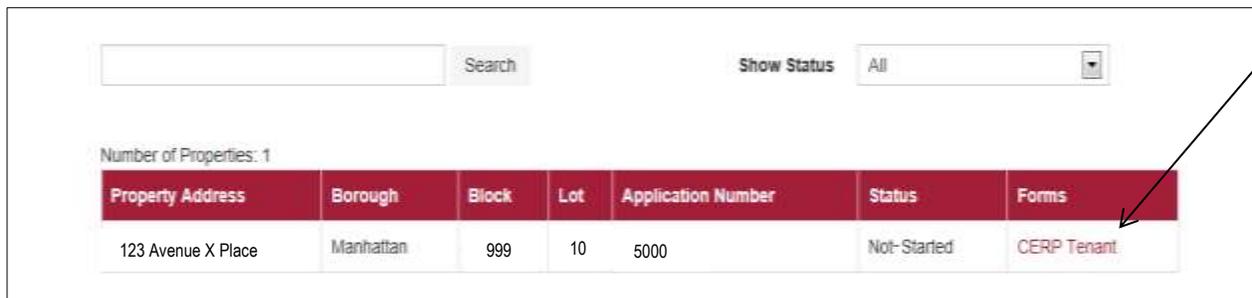
Forms

The Form Type will depend on the User Credentials. The form will either be CERP Owner or CERP Tenant.

Status

Status describes the status of the renewal form. A renewal form can be in one (1) of three (3) different statuses:

1. Not-Started: you have not clicked to open the form.

2. In Progress: you have started to complete the form, but were not able to finish. Your work has been saved.

3. Completed: you have opened, completed and submitted the form. A confirmation email has been sent to the email address you provided to acknowledge that the form has been submitted.

Show Status

The Property List is defaulted to show all forms Completed, In-Progress, and Not-Started. To display only one status, click down arrow and all options appear.

Helpful Hint: There will only be a single form displayed; the Show Status should remain on All.

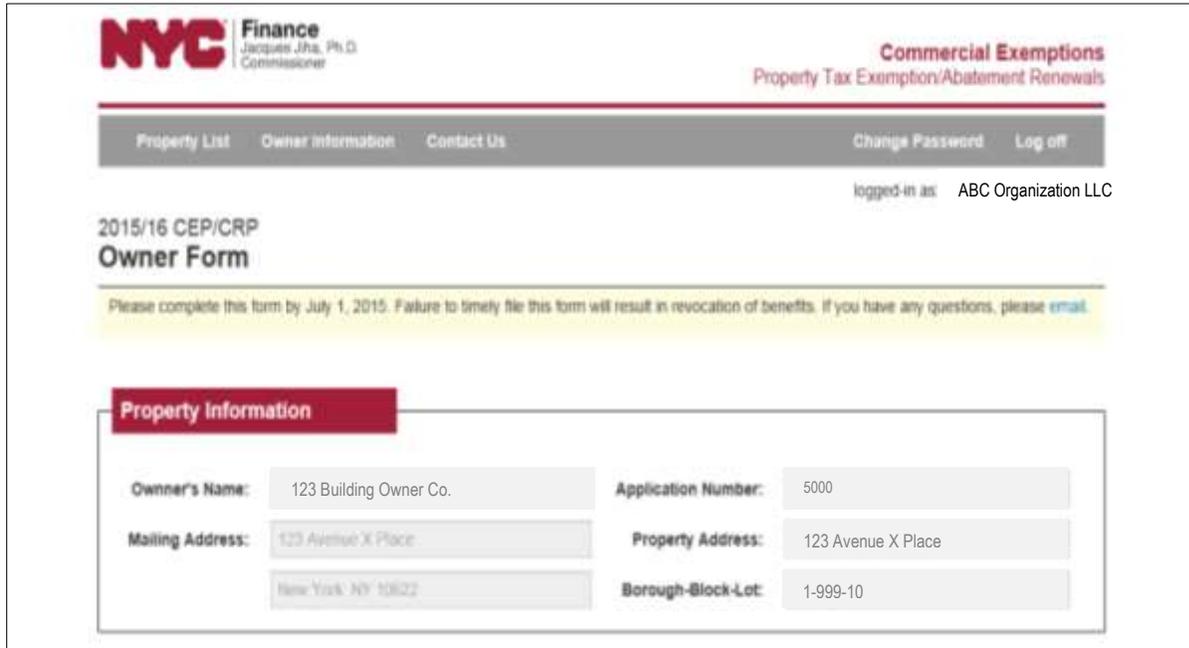If there are no application forms with the status you choose, you will see:

To get the entire list back, select All.

Completing a CERP Owner Renewal Form

Reminder: Renewal forms are due by July 1st 2015. We encourage you to file as quickly as possible to allow us time to get back to you if we have any questions.

All of the data is prepopulated based on the information entered on the previous screens.

Owner's Name field identifies the name of the entity that owns the building receiving the abatement benefit. If this information is incorrect and the identified party does not own the building, please contact us here.

Mailing Address field data was confirmed when you first logged-in to the application. This field identifies the mailing address of the associated owner representative.

Application Number field was confirmed during Property List –Screen 3 validation. It identifies the application number associated with this specific abatement.

**Property Address** and **Borough-Block-Lot** are identifiers for the property.

This is the contact information you confirmed when first logging into the renewal system. You may change the contact information at any time by clicking Owner/User Information on the grey bar.

Section Two

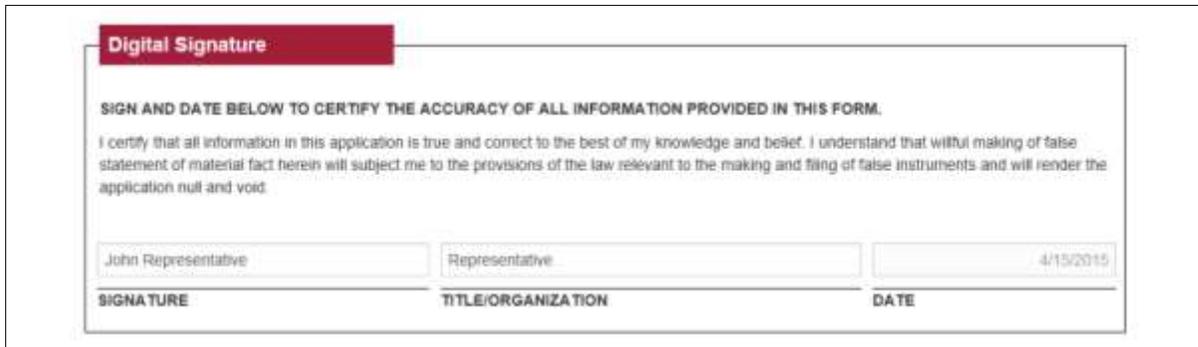- If the presented information is correct, choose YES and proceed to the forms next section.
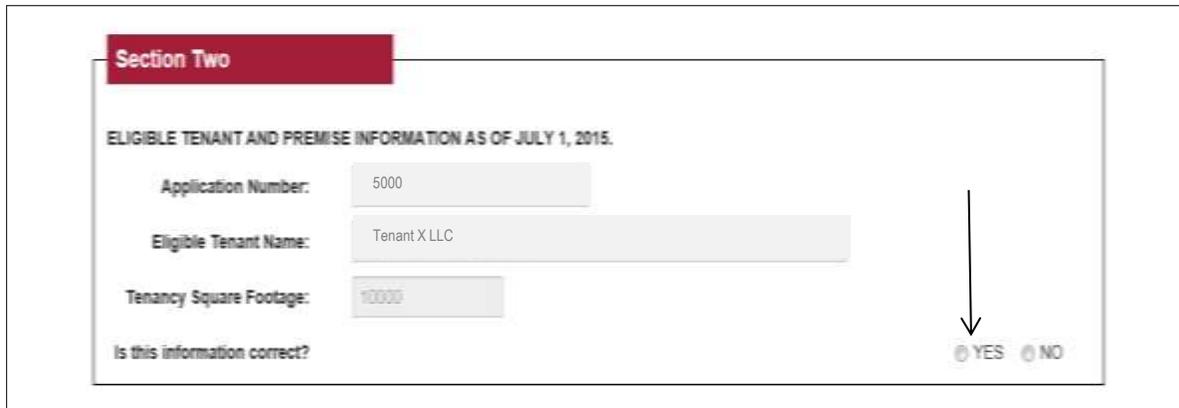
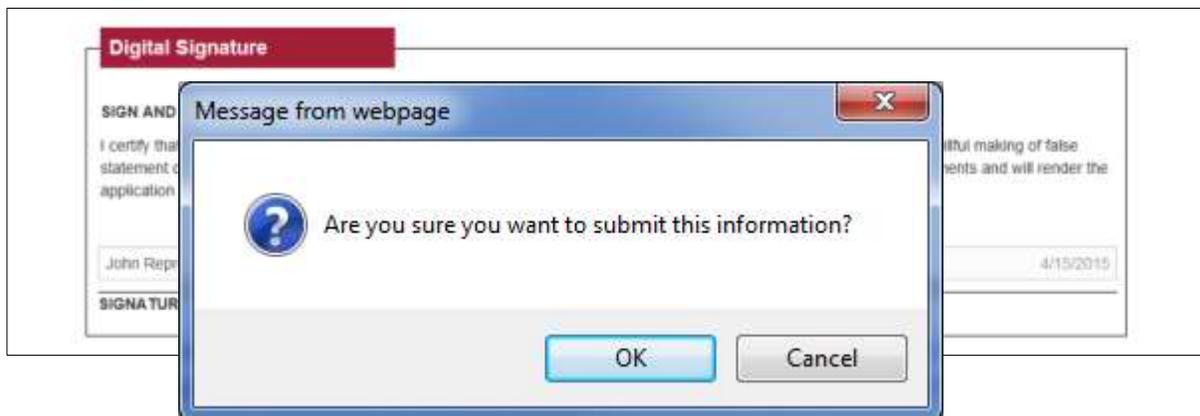- If the presented information is incorrect, Choose NO and enter the corrected information in the provided text box.

Digital Signature

To digitally sign the form, enter your name and title (position within the organization) in the displayed field boxes.
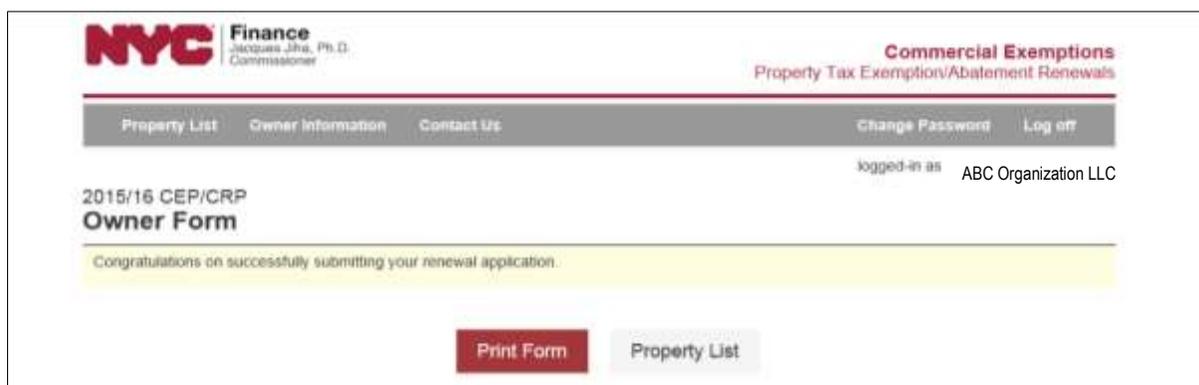

Submit Form

If you are satisfied that the form is accurate, click Submit Form. You will be asked to verify if you want to submit the form as completed.

Click OK to submit or click Cancel to keep the form active and not submit. If you submit the form you will then see the screen below:

You have the option of printing a copy of the form for your records by clicking Print Form. In the Property List, the form for the BBL you just submitted will say Completed. You will receive an email to the address you provided when you first logged-in, acknowledging receipt of the renewal form.

Completing a CERP Tenant Renewal Form

Reminder: Renewal forms are due by July 1st 2015. We encourage you to file as quickly as possible to allow us time to get back to you if we have any questions.

All of the data is prepopulated based on the information entered on the previous screens.

Tenant's Name field identifies the name of the entity that is receiving the abatement benefit. If this information is incorrect and the identified party is not the benefitting tenant, please contact us here.

Mailing Address field data was confirmed when you first logged-in to the application. This field identifies the mailing address of the associated tenant representative.

Application Number field was confirmed during Property List –Screen 3 validation. It identifies the application number associated with this specific abatement.

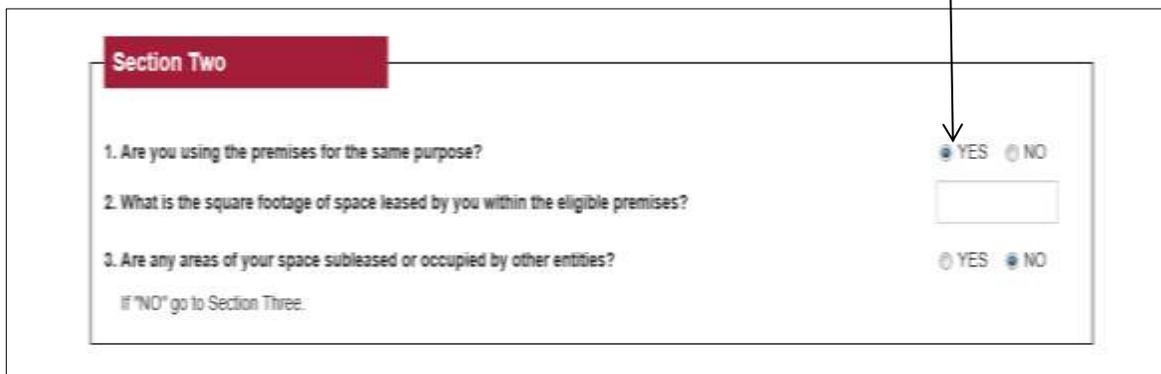**Property Address** and **Borough-Block-Lot** are identifiers for the property.

This is the contact information you confirmed when first logging into the renewal system. You may change the contact information at any time by clicking Owner/User Information on the grey bar.
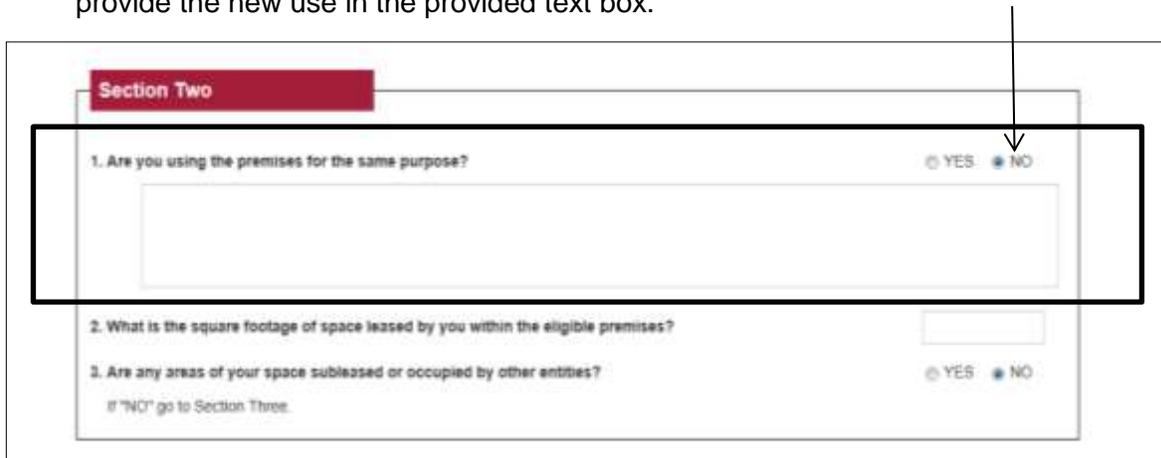
Section Two

Question 1

- If you are using the premises for the same purpose click YES for question 1.

- If you are not using the premises for the same purpose, click NO for question 1 and provide the new use in the provided text box.

Question 2

- For question 2, provide the square footage of the current tenancy.

Helpful Hint: When entering the square footage, do not include commas. For example; 5,000 square feet should be entered as 5000.

Question 3

- If none of the occupied space has been sublet to another entity and you occupy the same amount of square feet, click NO and proceed to Section Three.

- If any area of the occupied space has been sublet or occupied by another entity, click YES provide responses to the subsequent questions;
  4 – provide the amount of subleased space (do not include commas)
  4a – indicate the sublease start date
  4b – provide the relationship between the eligible tenant and the sub-tenant

Helpful Hint: When providing the sublease start date, question 4a, please use the pop-up calendar that appears.

Supporting Documentation

If Yes was the answer to question 3 in Section Two of the renewal form, you are required to provide a copy of the sublease agreement as supporting documentation.

Attaching a file works the same here as if you were attaching something to your email. Click the Browse button to locate the file on your computer (please note that only the following files are allowed: .pdf, .jpg, .jpeg, .doc and .docx and the maximum size of each file is 5MB). When you have identified the right document, click Open.

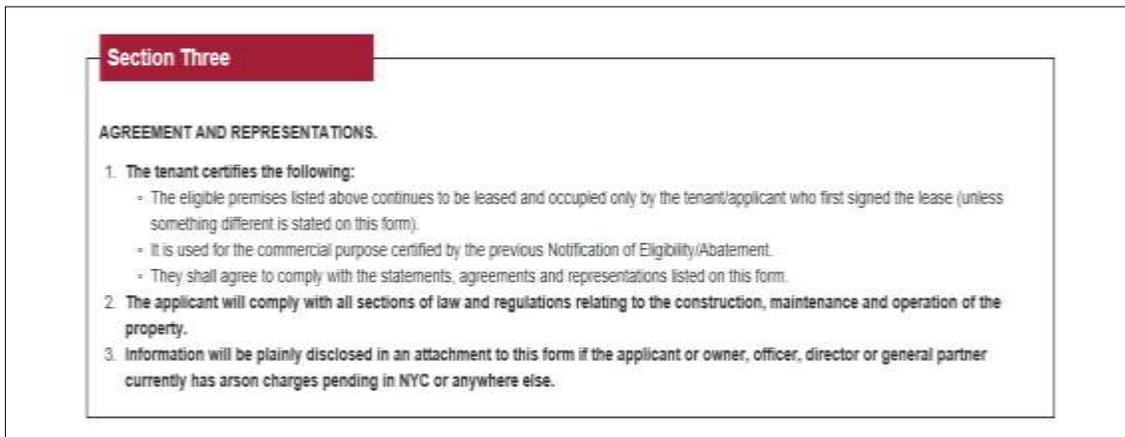If the upload is a success, the file screen will say Uploaded Successfully

If you've accidently uploaded the wrong file, click Delete to remove it. If you try to attach a file format that is not accepted, you will see this message: Only .pdf, .jpg, .jpeg, .doc and .docx accepted.

Section Three

The information in this section must be acknowledged by the tenant (representative). The agreements will be certified within the next section of this form.
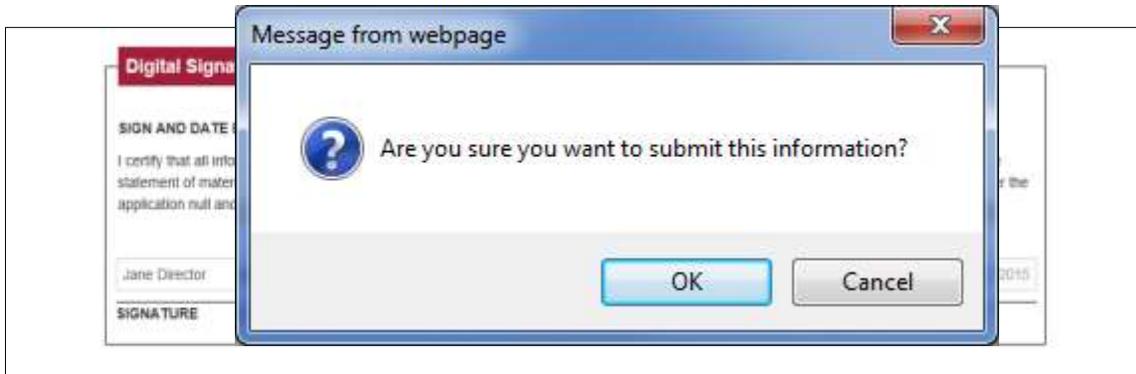
Digital Signature

To digitally sign the form, enter your name and title (position within the organization) in the displayed field boxes.
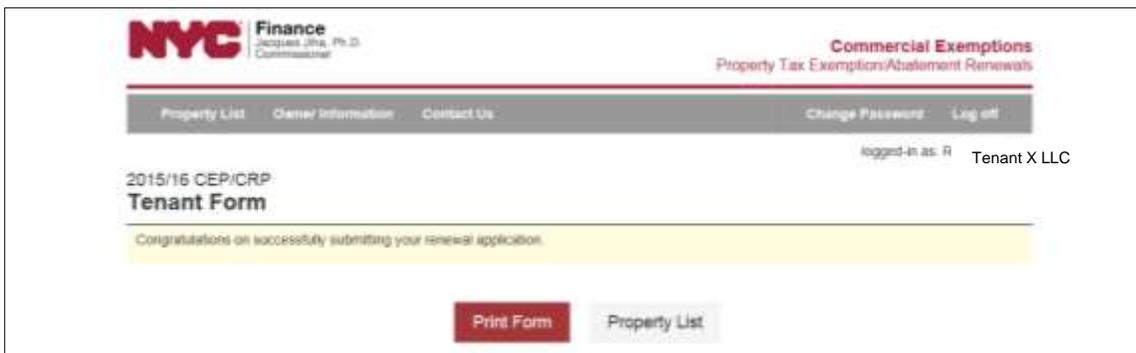
Submit Form

If you are satisfied that the form is accurate, click Submit Form. You will be asked to verify if you want to submit the form as completed.

Click OK to submit or click Cancel to keep the form active and not submit. If you submit the form you will then see the screen below:

You have the option of printing a copy of the form for your records by clicking Print Form. In the Property List, the form for the BBL you just submitted will say Completed. You will receive an email to the address you provided when you first logged-in, acknowledging receipt of the renewal form.