

# Homeless Contribution Tax Credit (HCTC)

## Formatting and Style Guide

To ensure that the HCTC Program has accurate data, both within our manually submitted contributions and Salesforce, all of the entries for names, address, and related information must be standardized. Having accurate data helps to eliminate the possibility of duplicates, minimize data clean up efforts, and ensures that information being distributed back to nonprofit partners and their donors is 100% accurate. Everything entered into an Eligibility or Contribution Form and Salesforce should be entered in the following format.

### HCTC Standardization

- Use proper capitalization for all entries. Do not use all capital letters or all lowercase letters.
- Be sure to only use one space between all words, numbers, names, etc.
  - Do not include any spaces before or after any words, numbers, names, etc.
- Review all information prior to submitting to check for spelling, formatting, and punctuation accuracy.
  - Look into best practice procedures with your organization to have a second person review information prior to submitting.
  - Accuracy for Social Security Numbers and full names to match is especially important.

### Organization Name

- Must be the non-profit organization's legal name as shown on the organization's tax return.
- Use accurate punctuation for organization name abbreviations
  - Ex.) Nonprofit Name Inc.
- On Contribution Form:
  - “Organization Name Contributing to” should be the organization’s full name, not their “Doing Business As” or “DBA” name.

## Donor Name

It is very important to maintain consistency and legal accuracy when entering donor information.

- Use full legal names as found on tax documentation
  - Do not use any nicknames (ex. “Steve” for “Steven” or “Patty” for “Patricia”, etc.)
- Include accurate spelling and punctuation for names
  - Ex. ) O’Reilly vs. Oreilly
- The donor name must match the Social Security Number that is printed on the certificate.
  - Do not use the spouse name with the donor’s SSN

## Address

- Use abbreviated state names - CO, MI, NM, etc.
- Do not use punctuation for street name abbreviations
  - Ex.) 123 W Elm St vs 123 W. Elm St.
- Common Abbreviations
  - North, South, East, or West - Only use the first letter.
  - Northwest, Southwest, etc. - NW, SW, etc.
- Secondary Unit Designator (Do Not Use Punctuation)
  - Apartment - Apt
  - Suite - Ste
  - Lot - Lot
- Street Suffixes (Do Not Use Punctuation)
  - Avenue - Ave
  - Boulevard - Blvd
  - Circle - Cir
  - County Road - CR
  - Court - Ct
  - Drive - Dr
  - Highway - Hwy
  - Lane - Ln
  - Parkway - Pkwy
  - Street - St
  - Way - Way