Tax Credit Cargo Verification Instructions

NOTE: The following instructions have changed, please review before moving forward.

Overview

A cargo verification summary is required when submitting a tax credit application with the Port of Virginia. The verification process will require a base year cargo list and a current tax year cargo list, this will allow us to calculate the change in cargo volume. Follow the instructions below and create a cargo verification summary for each tax credit you would like to file for.

Registration

Go to the registration page by using the registration link in the top navigation bar. If you have a login from the previous tax credit cargo verification system it will not work for this. You will need to create a new login. Last years data can be linked later.

Firms filing for multiple companies or multiple tax credits will only need one login.

First Login

On your first login, you will be prompted for your name and phone number. We request this information in the case we need to contact you regarding your account.

Getting Started

1. Add a company for each of the companies you are filing for By clicking the Add New Company button in the upper right.
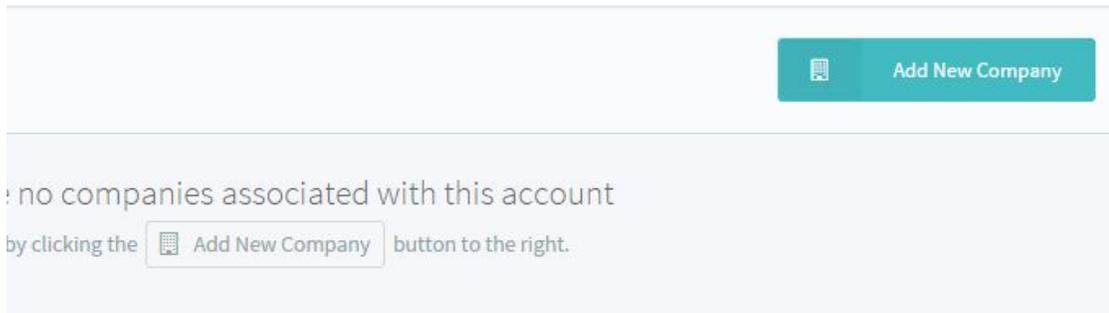

2. Follow the directions on the application to add a company.
3. If this company filed for a tax credit with the Port of Virginia last year, it will be shown in the list of tax credits under the newly created company. If this is the first time filing for a tax credit with the Port of Virginia, you will need to add one by click the 'Action' dropdown and then clicking 'New Tax Credit'. NOTE: To file for multiple tax credits add one at a time.
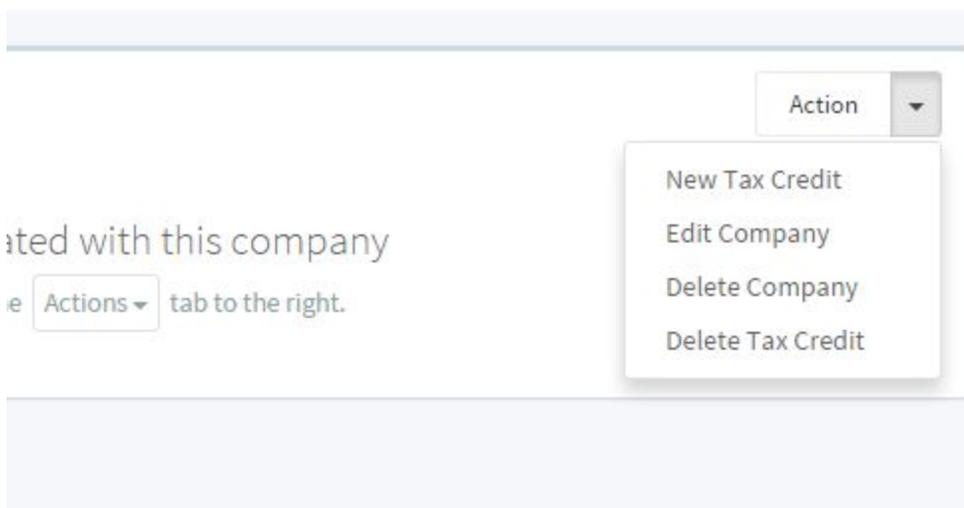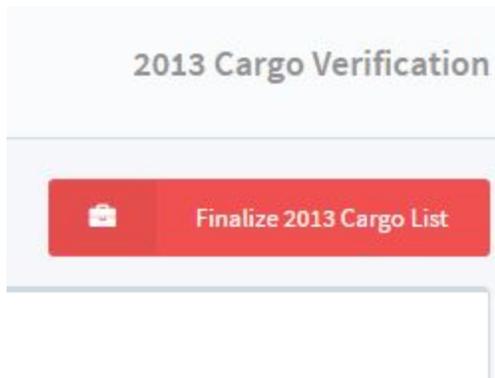

4. To start the cargo verification process, click on the tax credit in the list on the dashboard or on the sidebar. This will take you to a page where you will be able to upload cargo to be verified. To upload cargo please use the upload template as shown below.
   a. The Cargo Upload Results (shown in the top box after an upload) will display any syntax errors ex: rows with missing data. The entries with syntax errors will not be uploaded.

b. Under the Cargo Upload Results box will be a box called Cargo List. This will display all entries that did not have syntax errors. Initially these items will show a Processing state. This indicated the item is currently being run through the verification process. The state of the entries will automatically be updated as entries are verified. This can take up to 5 minutes.

5. After the entries have been processed, errors can be fixed by clicking on the item in the list and editing them.

a. Entries can be deleted or exported by clicking the checkbox next to them and then using the action tab in the top left corner of the Cargo List box
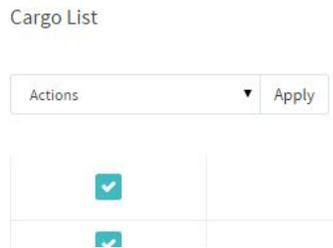
6. After all entries that should be verified are verified and there are no more entries to upload for the particular tax credit and year click Finalize Cargo List in the top right corner.

7. After this process has been completed for both the base year the the current tax year, an icon under 'Summary' for that company and tax credit will be shown on the dashboard. Click this icon to open the cargo verification summary that you will need to attach to the tax credit application.
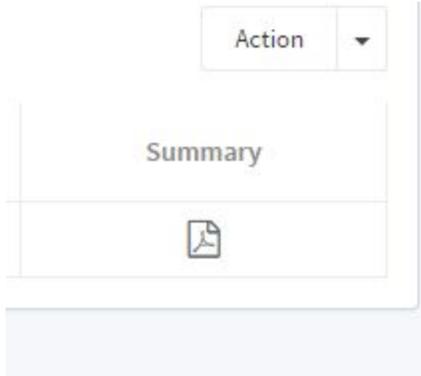
Upload Template

Cargo list can be added either using a .csv file or manual entry. In both case, the data format should match one of the templates below.

Containerized Cargo

For containerized cargo use the containerized template. The templates can be downloaded here: http://tax.portofvirginia.com/assets/containerized-template.csv

	A	B	C	D	E
1	Container	Import/Export	Booking/Bill of Lading		
2					
3					
4					
5					

1. Container: Must be 11 characters.
2. Import/Export: Must have the letter "E" or the letter "I".
3. Booking/Bill of Lading: If Import use Bill of Lading Number, else Booking Number. Twenty characters maximum.

Non-Containerized Cargo

For non-containerized cargo use the containerized template. The templates can be downloaded here: http://tax.portofvirginia.com/assets/noncontainerized-template.csv

	A	B	C	D	E	F	G	
1	Container	Import/Export	Booking/Bill of Lading	Vessel Code	Weight	Piece Count	Commodity Description	
2								
3								
4								

1. Container: Use "NC" for Non-Containerized cargo.
2. Import/Export: Must have the letter "E" or the letter "I".
3. Booking/Bill of Lading: If Import use Bill of Lading Number, else Booking Number. Twenty characters maximum.
4. Vessel Code: 4 character VIT Vessel Code. You can look up VIT Vessel Codes by Vessel Name here: http://www.vit.org/webreports/vesselcodes.aspx
5. Weight: A number indicating the weight in pounds. (Leave blank for roll-on/roll-off)
6. Piece Count: A number indicating the number of roll-on/roll-off pieces shipped on the particular bill of lading or booking number by commodity description. (Only needed for roll-on/roll-off)

7. Commodity description: Type the description of the roll-on/roll-off pieces listed on the bill of lading or booking number. For example: Jeep Cherokee. (Only needed for roll-on/roll-off)

Potential issues with using Microsoft Excel instead of a text editor

Microsoft Excel is capable of opening .csv files and you can save an Excel file as a .csv file. This tool may be easier to use than a text editor for creating your file. However, be careful about any conversions Excel may make. In particular, any fields that Excel may interpret as a number. This would include any booking or bill of lading number without letters in it. Excel may try to round or store in scientific notation any values it determines are numbers. This would alter your booking or bill of lading number and cause errors in your upload file. Make sure that Excel does not convert your file to another format like .xlsx. If you are prompted with the following warning, answer "Yes".