

# UEZ Certification System Overview - Coordinator Training Outline

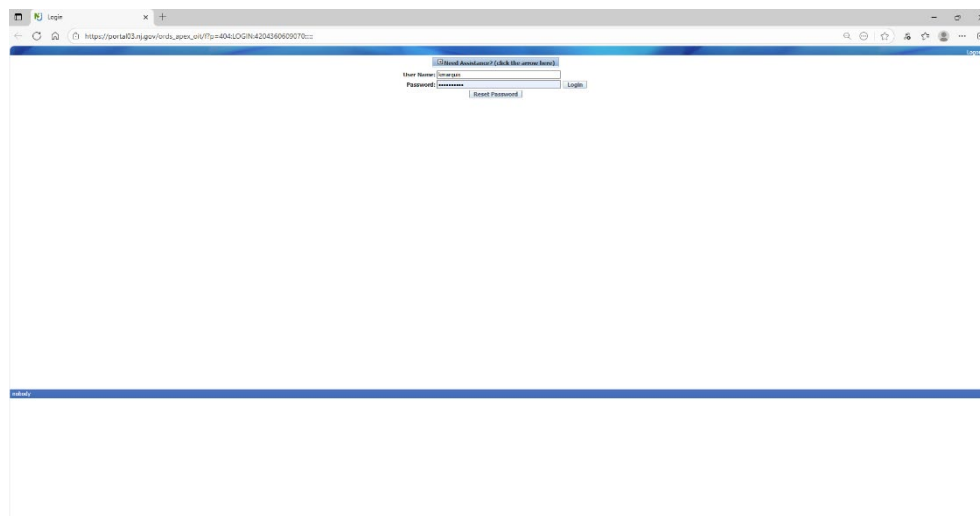
## Introduction

- Today, we are going to learn how to utilize the UEZ Certification System as a Coordinator. We will get into:
  - How to access the UEZ Certification System
  - What information is available on the Business Information Listings
  - Setting up your Business Information Listing for maximum optimization
  - Interpreting UEZ Files
- I believe that learning how to utilize this system will help you...
  - Keep up with certified businesses in your zone
    - The number of businesses, whether they are due for recertification, etc,
  - Gather info that will aid in the processing of local incentive applications
    - Learn when a business is certified and their UEZ File #
  - Learn more about the size of your zone and how you can set & manage goals

### *TRANSITION TO UEZ CERTIFICATION SYSTEM*

## How to Access UEZ Certification System

- First, you log into your myNJ account. You should have a section titled “DCA Applications,” and in that section, there is a box with the link “UEZ Certification.”
  - If any of you do not have that box, please send an email to [UEZInfo@dca.nj.gov](mailto:UEZInfo@dca.nj.gov) so we can arrange for an authorization code to be sent to you.
- Select the link and it should bring you to this page:



- When you first set up your account, your User Name is assigned to you. It is typically your first initial and last name.
- If you forgot your password or have trouble logging into your account, we now have a reset prompt! You select the “Reset Password” button and a new password will be sent to your email address. When you log in again, you will be directed to change it to a password of your choice.

## UEZ Main Menu

- Now, we’re logged in and this is what your screen may look like. We are going to focus mainly on the UEZ Business Information listing

**WELCOME**

You are logged in as **KMARQUIS**  
Your Zone is **ALL ZONES**  
(Click [here](#) to change your zone)

If you have any questions about this application, how to use it, or experience technical difficulties, please contact:

**DCA Help desk at UEZInfo@dca.nj.gov or call 609-292-8134**  
(Click [here](#) to email them now.)

[Change My Password](#)

**ACTIVITY SNAPSHOT**

- o [Application Summary \(Prior Week\)](#)
- o [Application Detail \(Prior Week\)](#)
- o [Companies Late \(Late to Date\)](#)
- o [Companies Due \(Next 2 Months\)](#)
- o [Tax Summary \(All 90-day Cond Appr\)](#)
- o [All Incomplete Applications](#)
- o [Active Business Summary Report](#)
- o [Summary Comparison Report](#)
- o [Economic Summary Report](#)

**UEZ MAIN MENU**

**[UEZ BUSINESS INFORMATION](#)**  
**Contains**  
-Business Listings

**[WEEKLY PROCESSING](#)**  
**Contains**  
-All Letters  
-Labels by Permit Number  
-Application Summary Report  
-Application Detail Report  
-Internal Application Processing Summary

**[ANNUAL REPORTING / RECERTIFICATION](#)**  
**Contains**  
-Applications  
-Mailing Labels  
-Companies Due  
-Companies Late

**[REPORTS](#)**  
**Contains**  
-Taxation Reports  
-Proofing Reports  
-Company Lists  
-Companies with 25% not met  
-Companies New to Zone  
-Company Profile by SIC Code  
-Investment and Summary  
-Woman & Minority Owned Businesses  
-Companies with Tax Delinquencies  
-Data Download

**ADMIN FEATURES**

**[TRANSFER APPROVED APPLICATION](#)**  
**Contains**  
Button to Transfer Applications

**[PRINT TRANSFERRED APPLICATIONS](#)**  
**Contains**  
Preview/Print Transferred Applications

**UEZ STAFF ONLY**

**[REVIEW ONLINE APPLICATIONS](#)**  
**Contains**  
-Listing of Recently Submitted Apps

**[ENTER PAPER APPLICATIONS](#)**  
**Contains**  
-Online Certs, Annual Reporting, and Recerts

**[VERIFY PBS/CLEAN FILE/BYPASS GIS](#)**  
**Contains**  
-Verify Tax Ids in PBS/  
Tax ID on File and Clean

KMARQUIS

# Business Information Listing

## What Information is available?

- This listing holds all the information gathered from every UEZ Application ever submitted (for your zone). If it was ever on an application, it is in here. Although, it may not appear that way, it is a much more user-friendly database than exporting all this information to Excel.
- Most Important Info
  - Legal Company Name
  - NJ Tax ID
  - UEZ File #
  - Status
  - Location Address
  - Certification, Annual & Recert Dates

## Setting Up Reports

- Unless you've played around with this on your own, you might not have set up your Business Information Listing to optimize your searches.
- List what the Primary Report has, let them know why you excluded email.
- This can be customized to what you search for the most, but if a column is not listed on your page, searching will turn out no results.
  - For Example, if you use the default "Primary Report" and try to search by the NJ Tax ID, you won't pull up any results and it would appear that the business is not certified.
- I will show you how to set up your own report, and my recommendation for best use.
  - First, we go to Actions then Select Columns.
  - On the left, we have the "Do Not Display" Column and on the right "Display in Report," this is what you see when you open the BIL.
  - Transfer between each column using the horizontal arrows between them. The vertical arrows on the left determine the order you want the report columns shown.
  - My Standard report is the Primary Report, but I've added the NJ Tax ID, Legal Corp Name, and Street Address. (Next Annual & Recert for Example)
- Once we have our perfect report, you must save it, by going back to "Actions" and selecting "Save Report." Give it a name, and now this report will automatically become the default, so you don't have to select columns every time you want to search for something.

## Using the Search Function

- Now we can search by any piece of info on this report!
  - Search by File #, NJ Tax ID to most accurately pull up a single business' file.
  - The Search is character sensitive. You have to spell names correctly and use the dashes and slashes for Tax IDs, or it won't show up.
  - If you want to know if a business has multiple locations, you can search by the first nine digits of the NJ Tax ID and it will generate all the files with it.
- Other ways to use the Search feature:
  - Do you want to see if a business is actively certified? Search by their NJ Tax ID. If it comes up with an A under "Stat" they are.
  - Need the File # for the business, you can search by NJ Tax ID and update the file # that way or the opposite!
  - Want to know if any businesses are certified at a particular location? Search by the Street Address (may have to modify for addresses with N, W, S, E)
  - Using the magnifying glass you can search within columns.
    - For example, you can search by NAICS Code if you're looking for particular types of businesses in your zone.
      - FULL-SERVICE RESTAURANTS = 722110
      - SUPERMARKET AND OTHER GROCERY = 445110

## Sorting and Filtering

- You have access to this information, but even better, you can sort and filter through this info by selecting the columns.
  - Example: Select **Stat** and Select **A**: it shows every active business in the zone and you can see the number at the top right.
  - Example: You can filter again, from the number of active businesses, how many were certified in the last month by selecting **Cert Dte** and choosing "Last Month"
- Other ways to use the Sort & Filter
  - You can organize the database in different ascending/descending orders. If you want to reset, just select **Actions** and then **Reset**.
  - You can keep your businesses active, by reminding anyone who recently missed an application deadline to complete it by filtering for **Stat (I)** and **Next Annual Due (Last Week)**

## The UEZ File: What It Means and How to Read It

- Okay, now that we've got the BIL database down pat. We can go into a business' file and learn even more!
- You can open a business' file by selecting the underlined File #
  - Open File #1
- It is organized into four sections:
  - Summary Information: Quick Info, not extremely important
  - Business Information: Basically the first page of their latest application.
  - Employment/Investment Information: This shows a lot of info pertaining to UEZ specifically. We'll go into this in detail.
  - Administration Notes: This is added by UEZ Staff, usually notes any changes that we have made manually or any notable correspondences with the business so that we can all be on the same page should the business call the helpline about an issue.

### Employment/Investment Information

| <b>COLUMN</b>            | <b>DESCRIPTION</b>                                                                                                                                     |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>DATE</b>              | Generally, the date a change was made. This is usually the Friday of the week an application was approved.                                             |
| <b>APP STAT</b>          | The status of the application, always either an A for Active or I for Inactive.                                                                        |
| <b>STAT DTL</b>          | More Information about the Status. Letters used here are C, E, G, N, O, Q, X, Y, Z.                                                                    |
| <b>PROG YEAR</b>         | Stands for Program Year. OS stands for Original Start (Date)                                                                                           |
| <b>FT PROJ</b>           | # of Projected Full Time Employees                                                                                                                     |
| <b>FT ACT</b>            | # of Actual Full Time Employees                                                                                                                        |
| <b>FT INC</b>            | # Full Time Employees have increased by (negative if decreased)                                                                                        |
| <b>NEW HIRES</b>         | Only updated for First Recertification                                                                                                                 |
| <b># OF CHKS</b>         | Number of Employees who meets the 25% Factor Requirements                                                                                              |
| <b>%</b>                 | # of Chks/New Hires (25% Factor formula)                                                                                                               |
| <b>PT PROJ</b>           | # of Projected Part Time Employees                                                                                                                     |
| <b>PT ACT</b>            | # of Actual Part Time Employees                                                                                                                        |
| <b>PT INC</b>            | # Part Time Employees have increased by (negative if decreased)                                                                                        |
| <b>ACTUAL CAPITAL</b>    | Figure listed for Actual Capital Investments for the program year                                                                                      |
| <b>PROJECTED CAPITAL</b> | Figure listed for Project Capital Investments for the program year                                                                                     |
| <b>UZ-1 QLFD</b>         | Whether they are eligible for Reduced Sales Tax based on answers to application (may not be accurate in practice) Y for Eligible or N for Not Eligible |
| <b>UZ4 TAX SAVINGS</b>   | How much the business saved with the UZ-4 Contractor's Exempt Purchase Certificate                                                                     |

|                        |                                                                                  |
|------------------------|----------------------------------------------------------------------------------|
| <b>UZ5 TAX SAVINGS</b> | How much the business saved with UZ-5 Urban Enterprise Zone Purchase Certificate |
| <b>ORIGIN</b>          | How the application was submitted, almost always Electronic                      |

## Status Detail Codes

| <b>CODE</b>         |                     | <b>MEANING</b>                                                                              | <b>SOLUTION, IF APPLICABLE</b>                                                                                                 |
|---------------------|---------------------|---------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| <i>APP<br/>STAT</i> | <i>STAT<br/>DTL</i> |                                                                                             |                                                                                                                                |
| A                   |                     | Active, no issues                                                                           |                                                                                                                                |
| A                   | E                   | Active, approved for an extension to meet program requirements                              |                                                                                                                                |
| A                   | G                   | Had Tax issues, currently in good standing                                                  |                                                                                                                                |
| A                   | X                   | Active with tax issues (180-Day Conditional Approval)                                       | Refer applicant to <a href="mailto:UEZTax.Clearances@treas.nj.gov">UEZTax.Clearances@treas.nj.gov</a> to prevent inactivation. |
| A                   | Y                   | Was inactive, but reinstated during program year                                            |                                                                                                                                |
| I                   | C                   | Inactivated because the business changed ownership and is now active under a different File |                                                                                                                                |
| I                   | N                   | Inactivated because they never submitted their renewal application                          | If within 6 months from due date, they can submit their missing application to be reactivated.                                 |
| I                   | O                   | Inactivated because the business closed/out of business                                     |                                                                                                                                |
| I                   | Q                   | Inactivated because the program requirements were not met or they opted out                 |                                                                                                                                |
| I                   | Z                   | Inactivated because the tax issues were not resolved within the 180-day conditional period  | Refer applicant to <a href="mailto:UEZTax.Clearances@treas.nj.gov">UEZTax.Clearances@treas.nj.gov</a> for reactivation.        |

## Notes about the File Information

- The UEZ runs on a Friday date system. If a business' application was due on a Wednesday, it will not be "officially" inactivated until that Friday.
- For businesses that were inactivated because of tax issues (I/Z), the date displayed will still be the application approval date, but in reality, the business was inactivated six months later.

- Another thing to note is that Actual figures correspond to the Program Year. Projected figures correspond with Date.
  - For example, if you want to figure out how many actual full-time employees an applicant put on their 2025 application, you would have to refer to the 2024 program year line. REMEMBER: Applicants are reporting information for the past program year.

Any Questions?