Farm Employer Overtime Credit Advance

USER GUIDE

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Quick Tip
Before you start, have the following information handy: • Farm's Employer Identification Number (EIN) • Farm owner(s) Taxpayer Identification Number(s) (TIN) • Representative's (e.g. tax preparer's) email address

The Farm Employer Overtime Credit is a refundable tax credit available for [eligible farm employers](#) who pay overtime wages after January 1, 2024, based on the phase-in of an overtime threshold in New York State. Farm employers may apply to the New York State Department of Agriculture and Markets for an advance payment of the eligible overtime wages paid between January 1 and July 31 each year.

Step 1: Register in the system

The first step in the application process is to complete your registration in the Farm Employer Overtime Credit Advance Certificate online system.

Logging In

To register, go to https://taxcredit.agriculture.ny.gov and log in to your My.NY.gov account. Your My.NY.gov account is the same one you use if you do online business with the NYS Department of Taxation and Finance, NYS Department of Motor Vehicles, or other New York State agency. If you do not have a My.NY.gov account, you must create one before proceeding.

Figure 1: My.NY.gov Sign In Screen

The first name, last name, and email address in your My.NY.gov account will be used to populate fields in the registration.

Important: If your first or last name needs to be updated, you must make the necessary change in My.NY.gov for the correction to appear in the Farm Employer Overtime Credit Advance system. See Appendix A: Maintaining your My.NY.gov account for more information.

Step 2: Choose your role/path

The first time you log into the system, you need to choose which role you are registering for, either: a) a farmer; or b) a representative who will be able to act on behalf of the farm for purposes of the Farm Employer Overtime Credit Advance application.

Figure 2: Choose Your Role Page

Step 3: Register (I am a farmer path)

Farm Registration

Quick Tip
If you are a tax preparer or representative acting on behalf of a farm, skip ahead to: Step 3: Register (I represent a farmer path) Farmers have the option to designate an official representative (tax preparer or other professional) who can act on their behalf in entering information and managing the application.

If you selected "I am the farmer," you will be guided through the registration process for a farm. If you are representing one or more farms in a professional capacity, such as a tax preparer, choose "I represent a farmer" and the system will guide you through the process of registering as a representative.

Representatives should see Step 3: Register (I represent a farmer path) for more information.

Farm Information

On this tab, provide the legal name of the farm as reported to NYS Department of Taxation and Finance.

Figure 3: Farm Registration - Farm Information Tab

Field Name	Description
Legal name of farm	This is the legal name of the farm used to report tax information to NYS Department of Taxation and Finance. It is a required field.
DBA or other common name	If your farm is commonly referred to by a different name, you can provide it here. This field is not required.

Point of Contact

On the "Point of Contact" tab, provide the best contact information for someone who can respond in the event there is a question about your registration. This point of contact may be different than someone you want to designate to act on your behalf, such as a tax professional. Note: Some information is automatically pre-filled from your My.NY.gov account.

Quick Tip

The point of contact is someone at the farm who is ultimately responsible for registration, representative management, and information provided for your advance application.

Figure 4: Farm Registration - Point of Contact

Field Name	Description
Contact First Name	The first name of the person who logged in to the system and is completing the registration. This is pre-filled by the system. If you need to change this, see Appendix A: Maintaining your My.NY.gov account
Middle Initial	The middle initial of the person completing the application. This field is not required.
Contact Last Name	The last name of the person who logged in to the system and is completing the registration. This is pre-filled by the system. If you need to change this, see Appendix A: Maintaining your My.NY.gov account
Contact Email Address	The email address of the person who logged in to the system and is completing the registration. This is pre-filled by the system. If you need to change this, see Appendix A: Maintaining your My.NY.gov account
Contact Phone Number and Type	The phone number the NYS Department of Agriculture and Markets can call if there are questions regarding the information provided. Provide a phone extension (if applicable) and phone type. These fields are required. Note: You will not receive any text messages without your advance permission.

Tax Information

On the "Tax Information" tab, you will provide the required information about the farm business necessary for the credit to be issued. This information should be consistent with what is provided for annual tax filings.

Figure 5: Farm Registration - Tax Information

Field Name	Description
Employer Identification Number (EIN) Type	If your farm files its tax returns using a Social Security number (e.g. sole proprietorship), select "individual". If your farm files its tax returns using an EIN, select "business".
Farm Employer Tax Identification Number	Enter the EIN or SSN that your farm uses to file taxes. **Important**: Dashes must be entered in the appropriate places depending on number type.
Business Entity Type	This should be the same as what income tax form(s) you file. Your choices are: • Corporation • Fiduciary/Trust • S-Corporation • Corporation • Sole Proprietorship • Partnership For more information about business entity types, speak with your tax professional or see this IRS resource about Business Structures.
Tax Year Start Month	This field tells us if you are a calendar year or fiscal year filer. Select your tax year start month from the list of months. If you are a calendar year filer, select January. If you are a fiscal year filer, select the start month of the farm's fiscal year. For more information about tax years, see the IRS resource on Tax Years or speak with your tax professional.

Owners/Partners

On the "Owners/Partners" tab, you will provide information about each of the legal owners of the farm. If the farm has multiple owners, partners, members, or shareholders, you will need to provide the Taxpayer Identification Number (TIN), such as a Social Security number (SSN) or Employer Identification number (EIN) for each, along with their percentage of ownership. The total percentage of ownership of all the owners must add up to 100% to complete your registration. An owner can be an individual or another business.

Note: The owner percentages must be filled out to the fourth decimal point and equal 100.0000% exactly.

Figure 6: Owners/Partners

To add additional owners, click the "Save and Add Another Owner/Partner" button. When you are done adding owners, click the "Save Owner/Partner" Information button to return the Owners/Partners Listing

When you have finished adding owners/partners, click the "Next" button.

Figure 7: Farm Registration – Owner Tab

Field Name	Description
Owner Type	This field determines which other fields need to be completed for the Owner. Your choices are: • Individual • Business This field is required.
Owner SSN/EIN	Provide the owner's Social Security Number or Employer Identification Number here. This number will be used in combination with the Percentage of Ownership information to calculate the credit that is allocated to each owner (if applicable). This field is required. Include dashes (-) when entering your TIN in either format (e.g., XX-XXXXXXX or XXX-XX-XXXX)
First Name, Middle Initial, Last Name	If you selected Individual as the Owner Type, the first name and last name of the owner are required.
Legal Business Name	If you indicated Business as the Owner Type, the legal business name of the owner business is required.
Percentage of Ownership	Add the ownership percentage for each owner. These must total 100%. All percentages must be entered out to four decimal places (e.g., XXX.XXXX%)

Representative

On the "Representative" tab, you have an option to indicate if you wish to have your tax preparer or other professional act on your behalf in the system. You can add or change representation at any time and do not need to complete this now.

Important: Only the farm can authorize a representative or change who their representative is (if any is designated).

Figure 8: Farm Registration - Representative Tab

Please note the following:

- The representative must also register in the system. If they have not already registered and you as the farm employer enter their information, they will receive an email notifying them to register.

- If a representative(s) is currently listed on this tab, they have already registered and requested access to enter data and/or manage your application on your behalf. You have the option to approve or deny this request.

- Only one representative per farm may be active in the system at a time.

Field Name	Description
Representative Email Address	The email address for your chosen representative. Information for representatives already registered in the system will be displayed here. If your representative has not yet registered, they will receive an email asking them to register. Once the representative has registered, the farm employer will need to sign in to the system and grant them access..

Confirmation Message

If the representative is not registered in the system yet, this is the message you will receive. Click "Yes" to notify the representative.
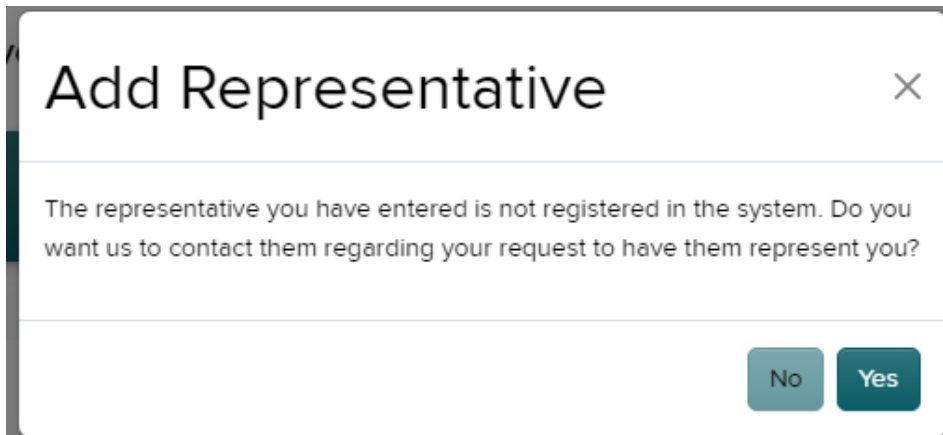

Figure 9: Add Representative Confirmation

Once the unregistered representative has been notified, this is what the "Representative" tab will look like:

Figure 10: Representative Tab - Unregistered Representative

If the representative is already registered in the system and you as the farm employer enter their email address in your registration, the system will retrieve the representative information and display it on this tab. When the representative status shows as "Active," it means this representative has been granted authority to enter data and manage your application. You may deactivate a representative at any time to cease their access to your application.

Figure 11: Farm Registration - Representative Tab, Registered Representative

Submit

The "Submit" tab displays the status of the information provided during registration . Missing information and/or errors will be displayed on this page. You will not be able to complete registration until all required information is provided and all errors are resolved.

Figure 12: Farm Registration - Submit Tab

If there are any errors that require correction, the page will look like this:
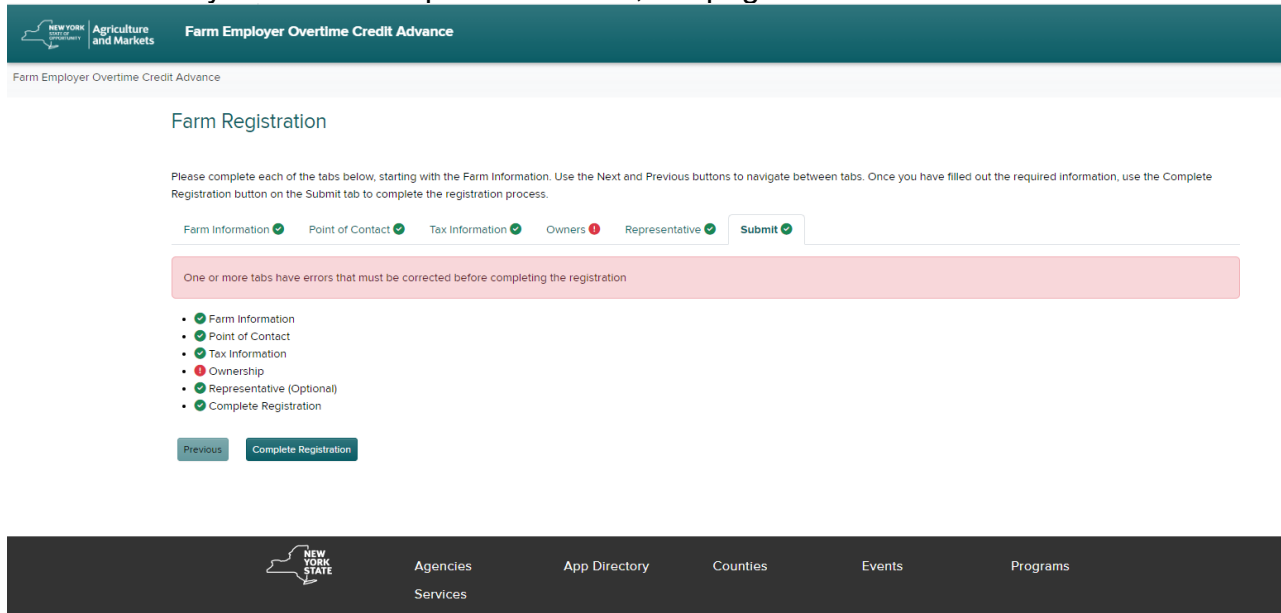

Figure 13: Farm Registration - Submit Tab with Errors

You can use the "Previous" button to navigate back to the tab showing the errors, or you can click on the tab. Correct the error(s) on the tab, navigate back to the "Submit" tab, and click the "Complete Registration" button to submit your registration.

Confirmation

The system will display a confirmation message with important information about next steps. You will also receive an email confirmation at the address you provided in the Point of Contact tab.
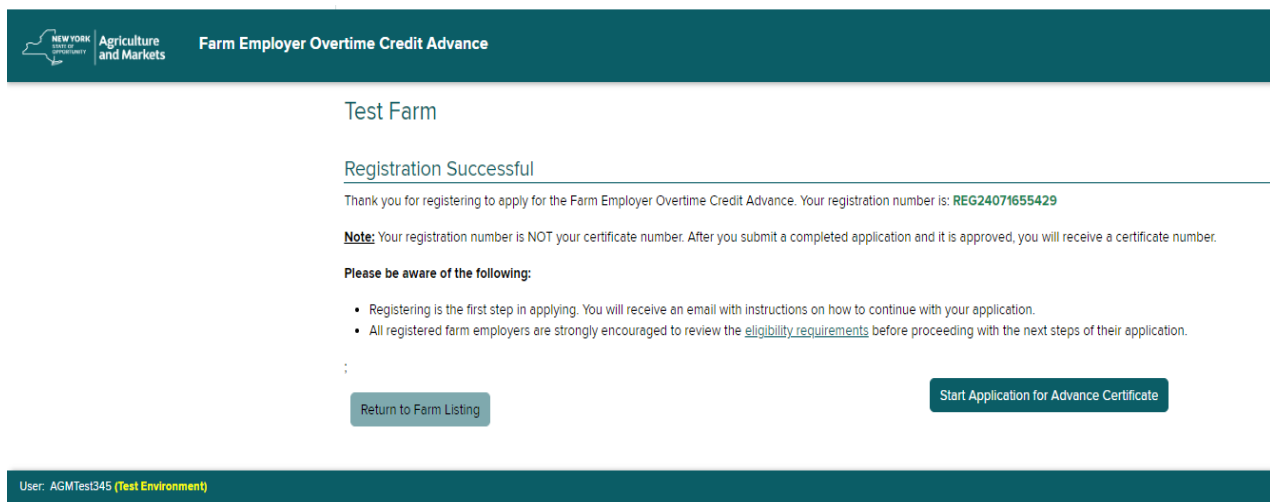

Figure 14: Registration Confirmation

Step 3: Register (I represent a farmer path)

Representative Information

Registering as a representative and requesting access to represent one or more farms is a simple process. Once you complete these few fields and click on the "Submit Registration" button, click "Return to Listing" and you can request access to represent a farm.

<table>
<tr><td colspan="2">Quick Tip</td></tr>
<tr><td>Note for Representatives: If the farm you plan to represent hasn't registered yet, we recommend that you register first and advise them that they will receive an email from the system (so they know it is not spam). The email will invite them to register, at which time they can confirm you as their designated representative. will "</td></tr>
</table>

Figure 15: Representative Information

Field Name	Description
First Name	The first name of the person who logged in to the system and is completing the representative registration. This is pre-filled by the system. If you need to change the Contact Last Name, see Appendix A: Maintaining your My.NY.gov account
Middle Initial	The middle initial of the person completing the representative registration. This field is not required.
Last Name	The last name of the person who logged in to the system and is completing the representative registration. This is pre-filled by the system. If you need to change the Contact Last Name, see Appendix A: Maintaining your My.NY.gov account
Legal Name	This is the legal name of the representative's business, such as the tax preparer's company. It is not a required field.
Email Address	The email address of the person who logged in to the system and is completing the representative registration. This is pre-filled by the system. If you need to change the email address, see Appendix A: Maintaining your My.NY.gov account
Phone Number and Type	The phone number the Department of Agriculture and Markets can call if there are questions regarding the information provided. Provide a phone extension (if applicable) and phone type. These fields are required. Note: You will not receive any text messages without your advance permission.

Confirmation

The confirmation page will display when the registration has been successfully completed and will display a list of farms that you as the representative have access to. If you click the "Request Access" button and provide the EIN of the farm and the farm's email address, the system will send the farm an email indicating you are requesting approval to represent the farm. If the farm has not yet registered, an email will be sent to the farmer inviting them to register.

Figure 16: Representative Registration Confirmation

Figure 17: Pop-up Message to Request Approval to Represent Farm

Figure 18: List of Farms Represented

Application for Advance Certificate

To begin your application for a credit advance, following the "Registration Successful" message (Figure 8), click on the "Start Application for Advance Certificate" button or the "Return to Listing" button, and navigate to the "Applications for Advance Certificate" tab.

Figure 19: Applications for Credit Advance

On the "Applications for Advance Certificate" tab, click on "Start Application for Advance Certificate" to begin an application.
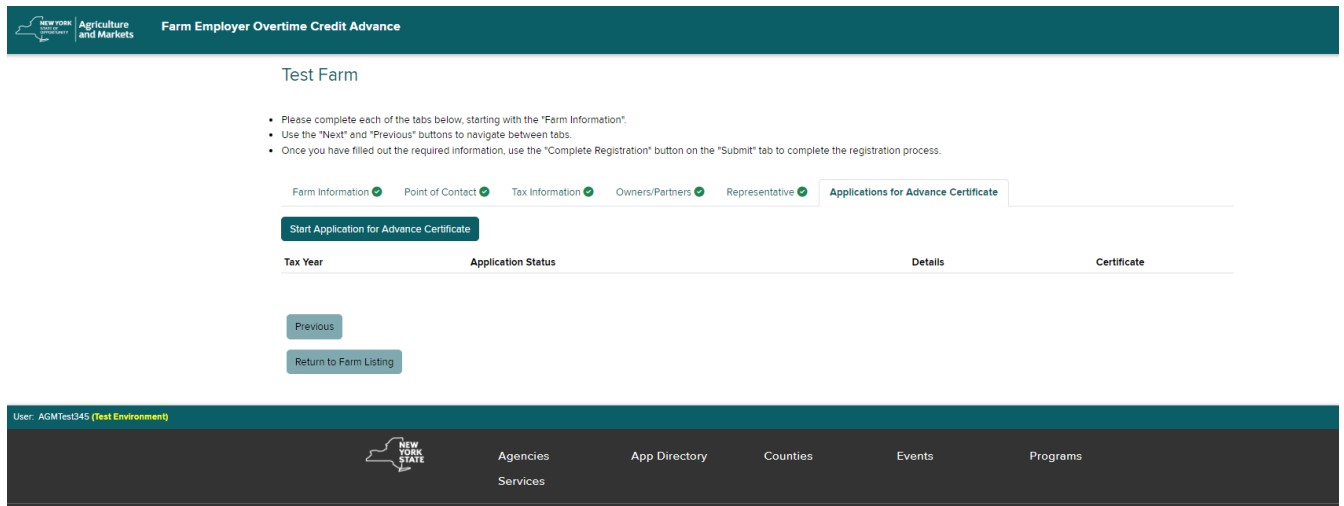

Figure 20: Applications for Credit Advance

Field Name	Description
Tax Year	This field identifies the tax year for any application in process or completed. It will be blank until the first application is started. The system will only display available tax years and will automatically update when new years are available. Once an application has been started for a specific tax year, that tax year will no longer appear as an option in the drop down.
Application Status	This field provides the status of each application. Statuses are as follows: **Application In Process** – indicates application has started, but has not yet been submitted. **Application Submitted** – indicates application has been submitted (certificate issued). **Application Approved** – indicates your application data has been transmitted by AGM to DTF.

Select the appropriate tax year you are applying for. Only those tax years currently available in the system will be displayed. (Note: In Figure 21 below, 2023 and 2024 are available). Once an application has been started for a specific tax year, that tax year will no longer appear as an option in the drop down.
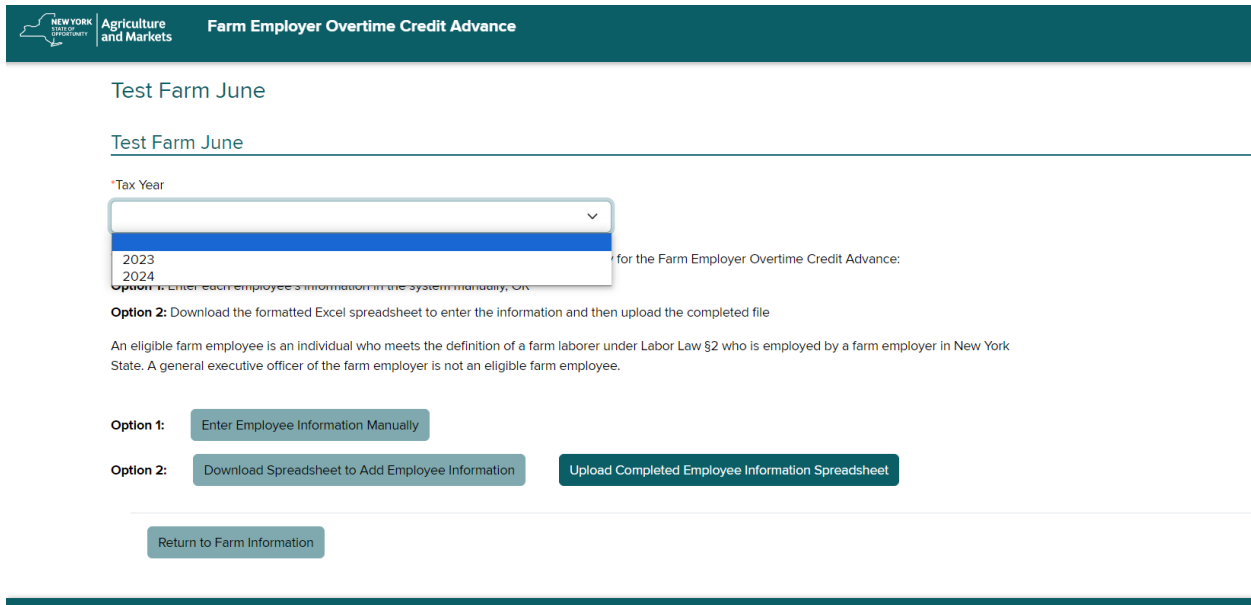
18

Figure 21: Select tax year

Once selected, the year will be displayed (2024 in the example below). There are two options to enter employee payroll data:

Option 1 – enter employee information manually

Option 2 – download/upload employee information

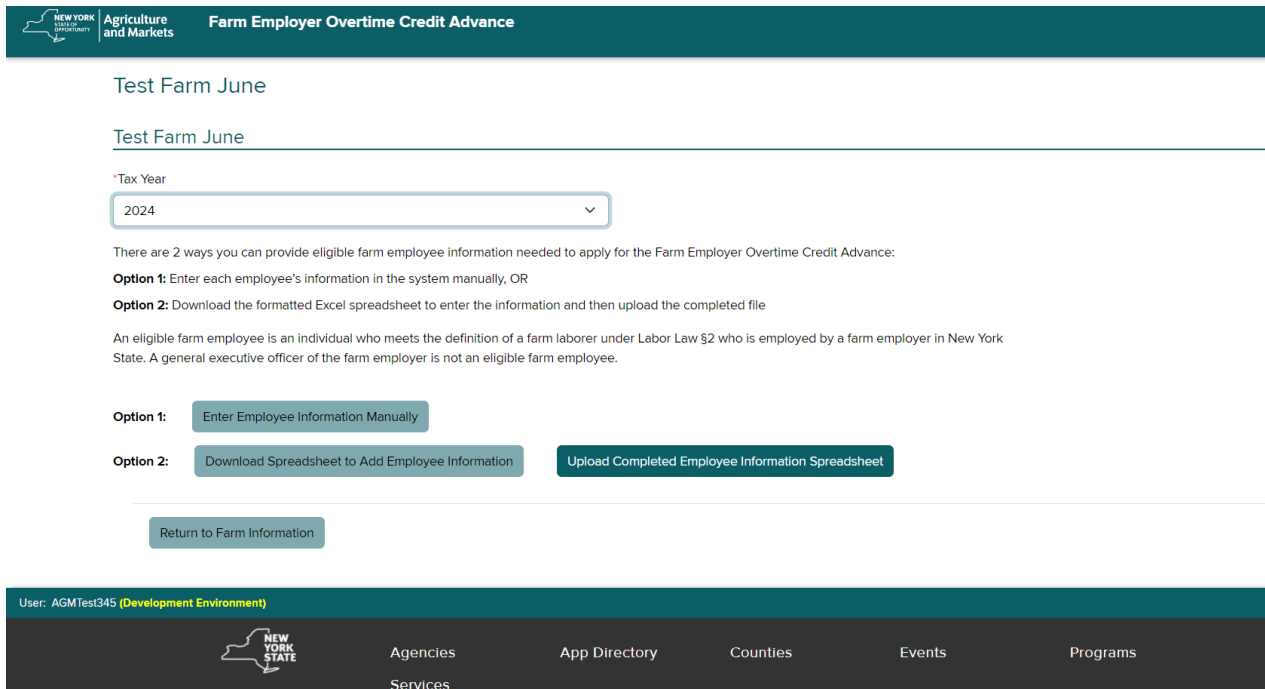Note: You can always edit information manually, regardless of which option you choose.

Figure 22: Applications for Credit Advance – Entering Employee Information

Option	Description
Option 1 – Enter Employee Information Manually	This option allows users to directly enter payroll information into the system manually. This is typically best suited for employers with a smaller number of employees.
Option 2 – Download Template Spreadsheet to Add Employee Information	This option allows users to enter information into an Excel template and upload payroll information directly into the system. This is typically best suited for medium to large employers with a significant number of employees.

Important: If you manually enter payroll data in the system before you upload an Excel file, the manually entered data will be overwritten by the upload. Always upload data first and then enter additional data manually in the system, if necessary.

Click on the "Enter Employee Information Manually" button to add employee payroll information directly into the system. Refer to Figure 22: *Applications for Credit Advance – Entering Employee Information* to continue.

Option 1- Entering Employee Payroll Data Manually

On this screen, you will provide information about each of the eligible employees of the farm. To add an employee, click on the "Add Farm Employee" button.
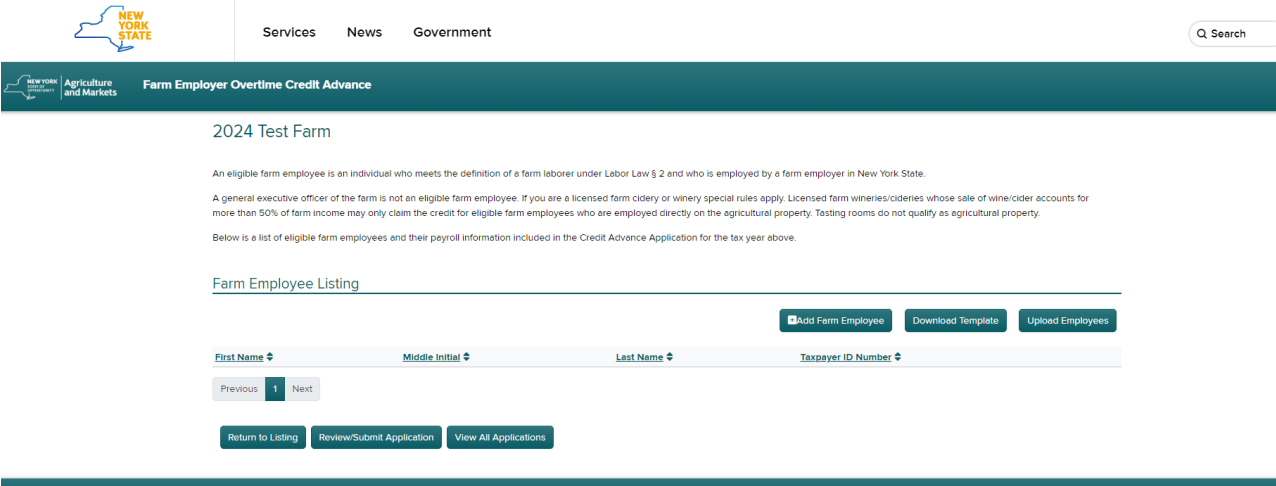

Figure 23: Applications for Credit Advance – Entering Employee Payroll Information

Buttons	Description
Add Farm Employee	This button can be used at any time to add a new farm employee.
Download Template	Used for option 2 only.
Upload Employees	Used for option 2 only.

In the next screen, enter the employee First Name, Middle Initial (not required), Last Name and Taxpayer ID Number and click the "Save Employee Information". Note: Employee Tax IDs must be entered using dashes in XXX-XX-XXXX format.

This will display the "Payroll Information for Employee" section. Enter payroll information for each employee. Credit amounts are based on this information. Ensure your entry is accurate before continuing. Make sure to enter information carefully so the system can accurately calculate your estimated credit amount.

Important: If an employee was paid different rates during the tax year, a separate pay period entry will need to be made for each pay rate.

Figure 24: Applications for Credit Advance – Entering Employee Payroll

Tip: You can enter one pay period (e.g., January – July) provided the payroll rate for the employee has not changed during the period specified . To add more than one pay period, click "Add Additional Pay Periods for this Employee" button.

Once done, click the "Save and Return to Employee List" button.

Figure 25: Employee Listing

If unsuccessful, you will see an alert prompting your correct the issue. Take the appropriate corrective action, once corrected, resave and repeat these steps.

Option 2 - Using the Excel Template to Upload Payroll Data

This option works best when you already have payroll data saved in a format that easily transfers to an Excel spreadsheet.

To start, click the "Download Template" button. This will save the file to your downloads folder on your device.

Next, open the file and follow the instructions included in the template to fill out the spreadsheet with your payroll data.
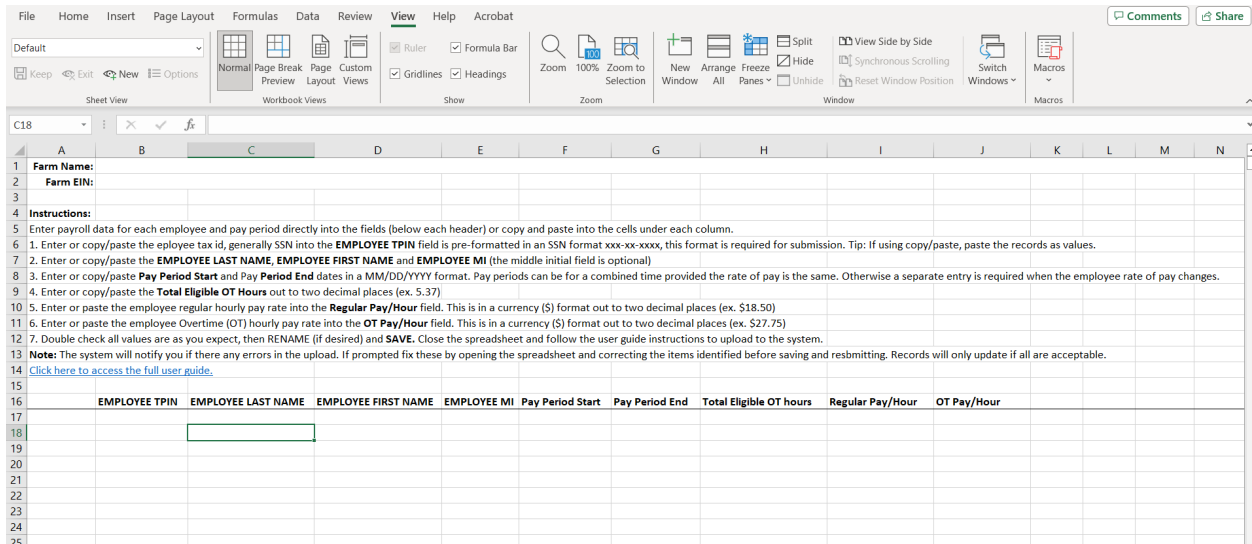
Figure 26: Excel File Sample

After you have filled out the template with your payroll data and saved it, you will be ready to upload the file. You may upload the file by either clicking the "Upload Completed Employee Information Spreadsheet" button on the "Select Tax Year" page (see Figure 22), or by clicking the "Upload Employees" button on the "Farm Employee Listing" page.
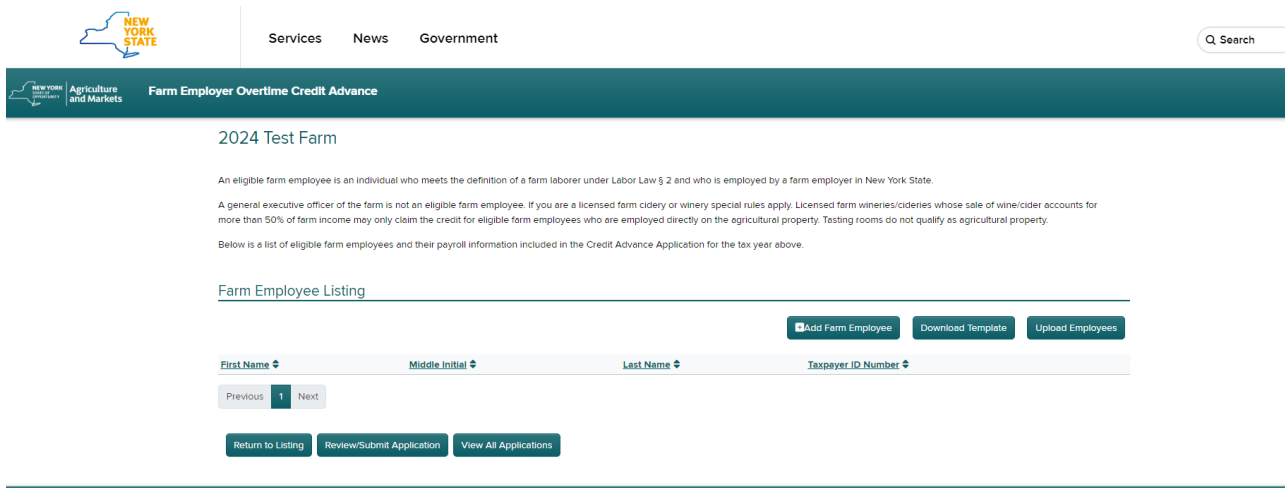

Figure 27: Upload File

Click on the "choose file" button and select your file from your device. The name of the file will display once selected. Then, click Upload.
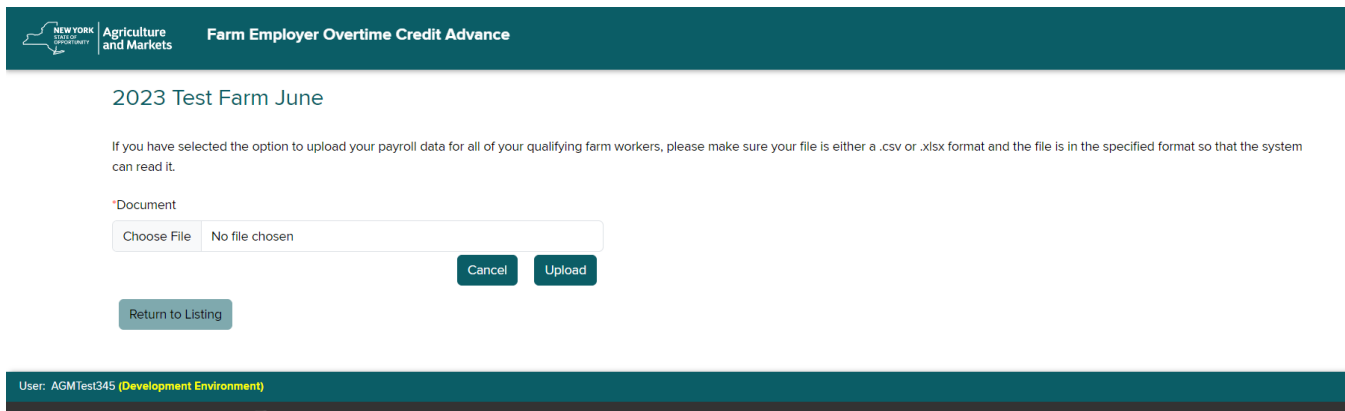
Figure 28: Upload file continued

If successful, you will see a confirmation screen. To view the records in the system, return to the Farm Employee list. Here, as with Option 1, you can edit or update records.

Note: If you need to update a significant amount of payroll information, , you can upload a revised spreadsheet. This will overwrite any previously saved records.

The system will notify you if there any errors in the upload process. If prompted, fix these by opening the spreadsheet and correcting the items identified before saving and resubmitting. Records will only update if all are acceptable.
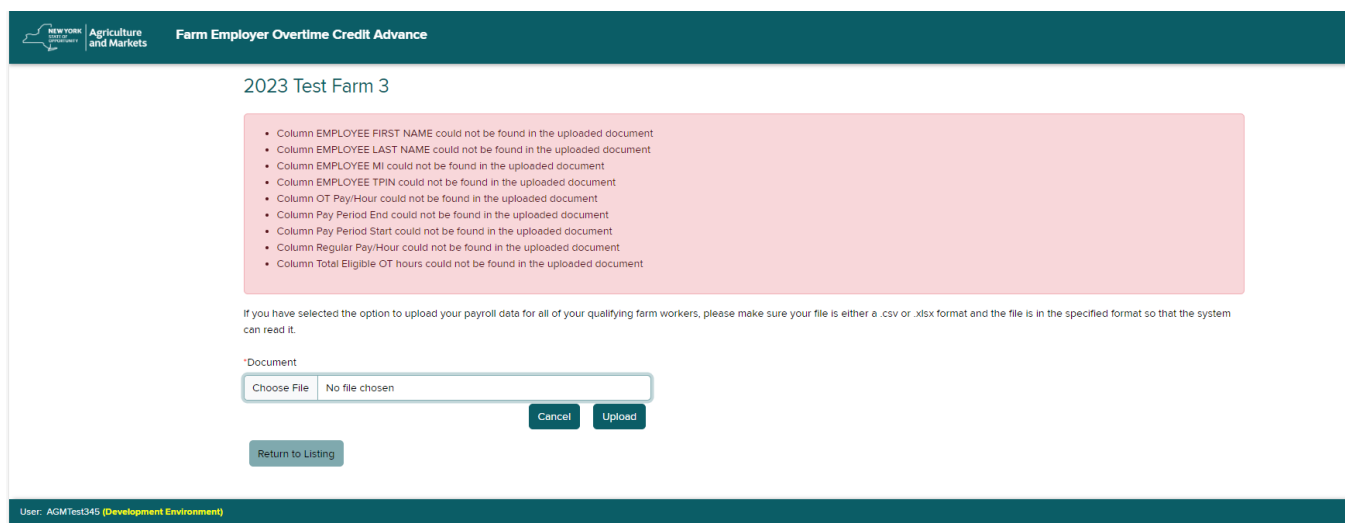

Figure 29: Error Messages

The system will return you to the "Employee Listing Summary Screen".

Once ready to submit the application, click on the "Review/Submit" button.

Figure 30: Review and Submit

Generating your Advance Certificate

The system will display the "Credit Advance Application - Summary and Attestation". Prior to submitting the application, review the information for accuracy. You will see a summary of all the information you have provided in your application, including Farm Information, Point of Contact, Tax Information, Owners, and Representative (if any). There will also be a summary of the number of employees and total eligible OT hours to verify. If any changes are needed, click on the "Review Details of Employees and Payroll" button and repeat the required attestation steps.

Farm Information

Legal Name of Farm : Test Farm
DBA or Common Name of Farm:

Point of Contact

Contact First Name : Tom

Middle Initial :

Contact Last Name : Thomas

Contact Email Address : agmtest345@mail.com

Contact Phone Number : 5189491959

Contact Phone Ext :

Contact Phone Type : Home Phone

Tax Information

Employer Identification Number (EIN) Type : Individual
Farm Employer Tax Identification Number : ###-##-3334
Business Entity Type : Corporation
Tax Year Start Month : January

Owners

Owner Type : Individual

Name : Test Farmer

Owner SSN/EIN : ###-##-3344

Percentage Of Ownership : 100.0000

Representative

Application for Credit Advance

Number of eligible farm workers included on application: 1

Total eligible overtime hours included on application: 100.00

[Review Details of Employees and Payroll]

I HEREBY CERTIFY that: All information provided herein is true, accurate and complete. FURTHER, I HEREBY ACKNOWLEDGE AND AFFIRM that Based on my review of the farm's current financial standing to date, I (farm employer) expect to meet the eligibility requirement of having federal gross income from farming that is at least two-thirds of the farm's federal gross income from all sources that exceeds thirty thousand dollars for the taxable year.

- I (farm employer) am aware of the serious implications regarding the information provided herein on my tax liability and that of the farm owners/partners/members/shareholders and further agree that it is my responsibility to consult with a tax professional as necessary.
- I (farm employer) am authorized to submit this application on behalf of the farm owners/partners/members/shareholders.
- I (farm employer) am responsible/liable for sharing the information provided in this application with all owners/partners/members/shareholders.
- If it is determined that the farm is eligible for an advance certificate, I (farm employer) am responsible for sharing the certificate with all owners/partners/members/shareholders so they can each request their advance credit payment from the New York State Department of Taxation and Finance.

[Return to Farm Listing] [View All Applications] [Submit Application for Advance Certificate]

Figure 31: Review and Attestation

If ready to proceed and submit, review the attestation and click on the "Submit Credit Advance Application" button. Wait for the screen to change.

When successful, the system will present the "Credit Application Submitted Successfully" screen.
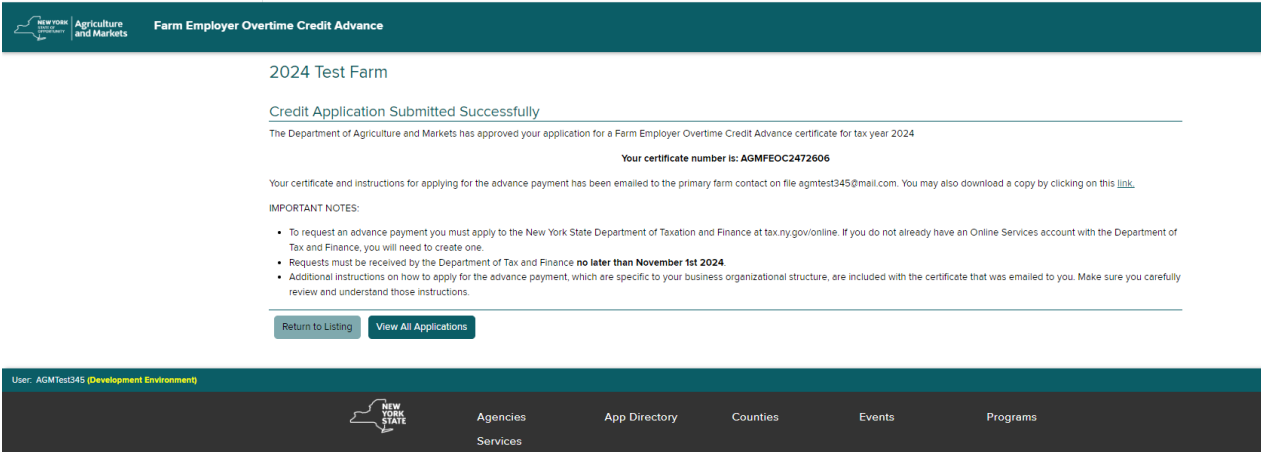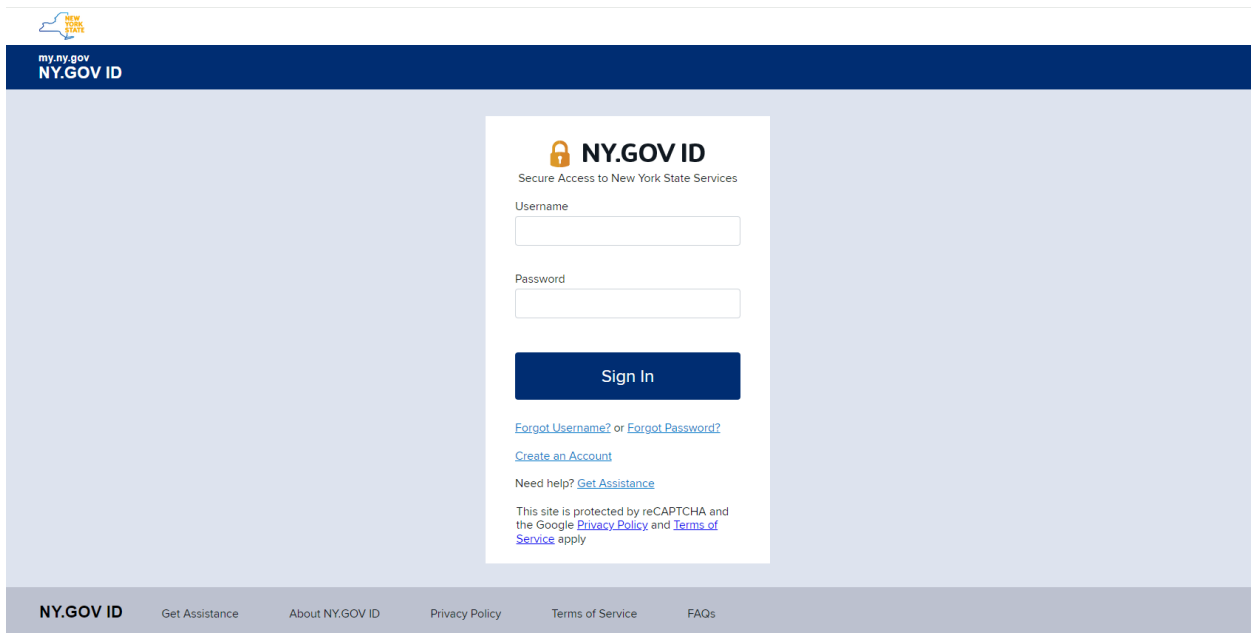
2024 Test Farm

Credit Application Submitted Successfully

The Department of Agriculture and Markets has approved your application for a Farm Employer Overtime Credit Advance certificate for tax year 2024

Your certificate number is: AGMFEOC2472606

Your certificate and instructions for applying for the advance payment has been emailed to the primary farm contact on file agmtest345@mail.com. You may also download a copy by clicking on this link.

IMPORTANT NOTES:

- To request an advance payment you must apply to the New York State Department of Taxation and Finance at tax.ny.gov/online. If you do not already have an Online Services account with the Department of Tax and Finance, you will need to create one.
- Requests must be received by the Department of Tax and Finance **no later than November 1st 2024**.
- Additional instructions on how to apply for the advance payment, which are specific to your business organizational structure, are included with the certificate that was emailed to you. Make sure you carefully review and understand those instructions.

[Return to Listing] [View All Applications]

User: AGMTest345 **(Development Environment)**

Agencies   App Directory   Counties   Events   Programs
Services

Figure 32: Certificate Submitted Successfully

Your certificate number is presented on the screen along with a link to download your certificate directly from the screen. The certificate file will also be emailed directly to the farm's primary contact. The email will include instructions on how to apply for an advance payment to the New York State Department of Taxation and Finance.

Appendix A: Maintaining your My.NY.gov account

Logging in

When you access the portal, either by clicking on the button on the [Farm Employer Overtime Credit Advance](#) page on the NYS Department of Agriculture and Markets' website or going directly to the online portal [system](#), you will be brought to My.NY.gov to log in.

Figure 33: My.NY.gov Sign In Page

If you have done online business with a New York State agency such as the Department of Motor Vehicles or Department of Taxation and Finance, you may already have a My.NY.gov account. If you do not have a My.NY.gov account, you will need to create one.

Create a My.NY.gov account

1. Navigate to My.NY.gov or click the "Create an Account" link from the sign in page
2. Click on the "Personal" account type
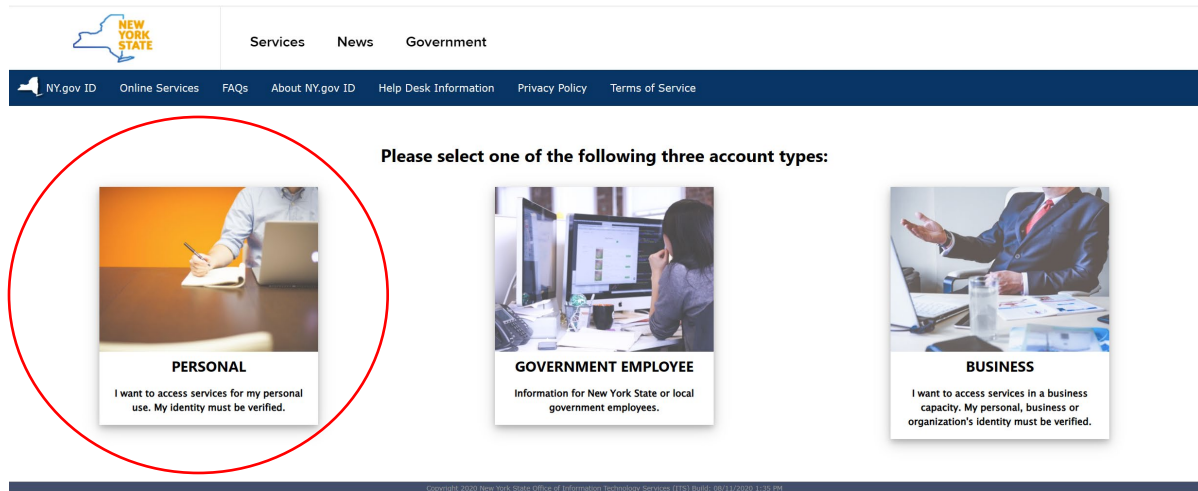
Figure 34: My.NY.gov Account Types

3. Click on the "Sign Up for a Personal NY.gov ID" button
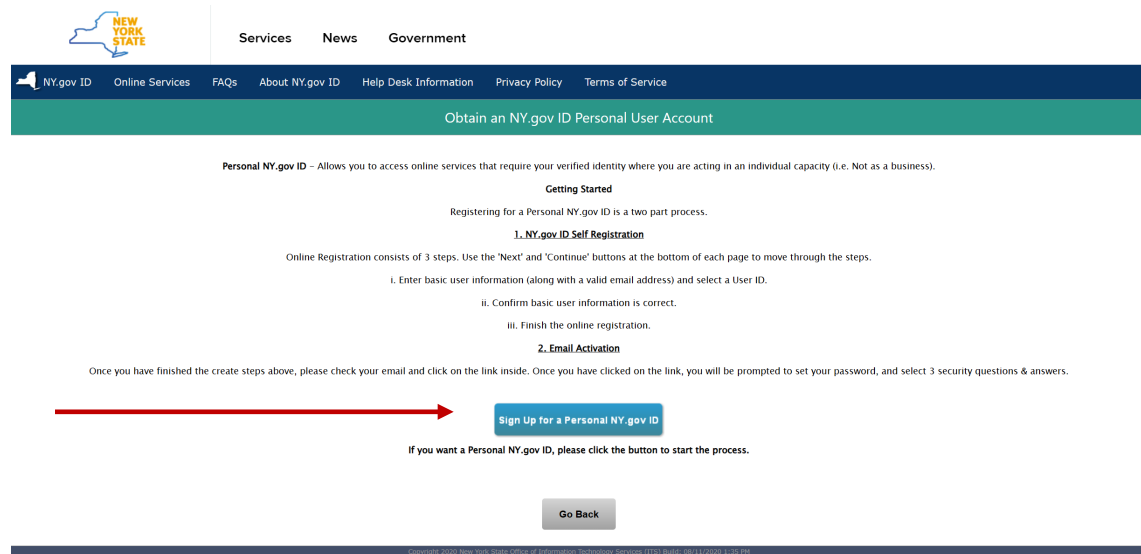
Figure 35: Obtain an NY.gov Personal User Account

4. Complete the "Account Information" form and click continue. The following fields are required:
   a. First Name
   b. Last Name
   c. Email Address
   d. Confirm Email Address
   e. Create a Username

If the username you want to use is already taken, you will be prompted to select one from the suggestions provided, or you may type in a different one.

Figure 36: My.NY.gov Account Information Page

5. Fill in your address and date of birth. Note: City and date of birth are required fields.

Figure 37: My.NY.gov Personal Information Page

6. Review the information you've provided and click the "Create an Account" button.

Figure 38: My.NY.gov Review Page

7. You will receive a confirmation message and instructions to check your email's inbox to finish setting up your account. Click the "Return to Sign In" button.

Figure 39: My.NY.gov Confirmation Page

8. Go to your email provider and access the email account used to create your My.NY.gov account. Click on the email from NY.Gov ID. If you don't see an email, make sure to check your spam or junk folder.
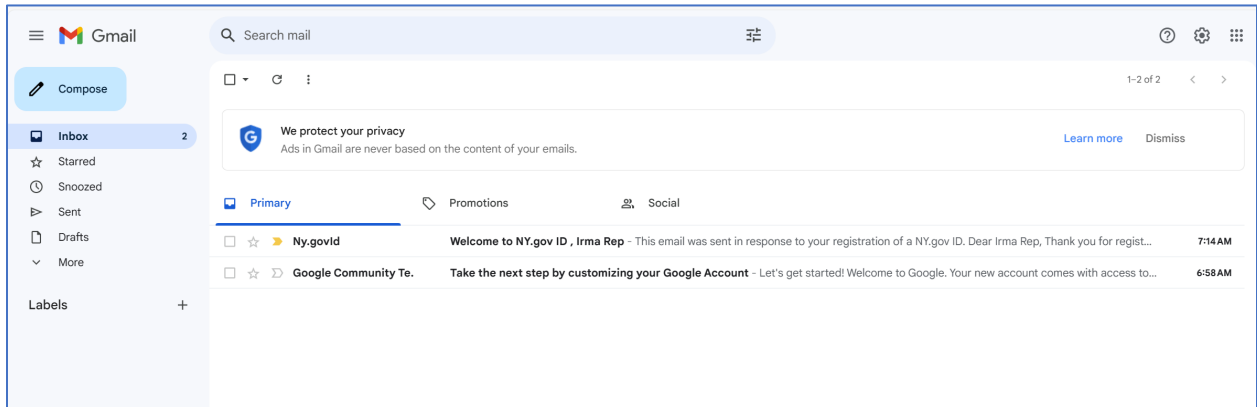
Figure 40: Example of a Gmail Inbox With Welcome Email

9. Click on the "click here" link in the email to set your security questions and activate your account.
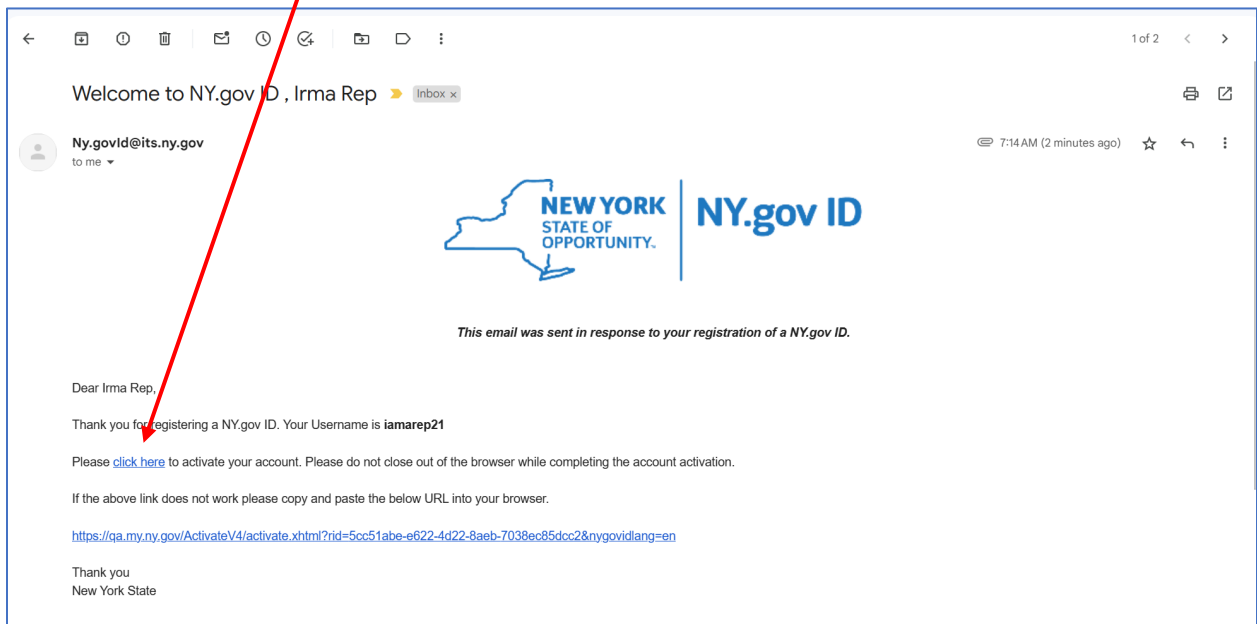
Figure 41: Welcome Email

10. Set your secret questions and answers. These questions and answers will help you reset your password in the future, so make sure you remember your answers. When you've selected three secret questions and set the answers for each of them, click the "Continue" button.

Figure 42: My.NY.gov Secret Questions

11. Next you'll create your password.
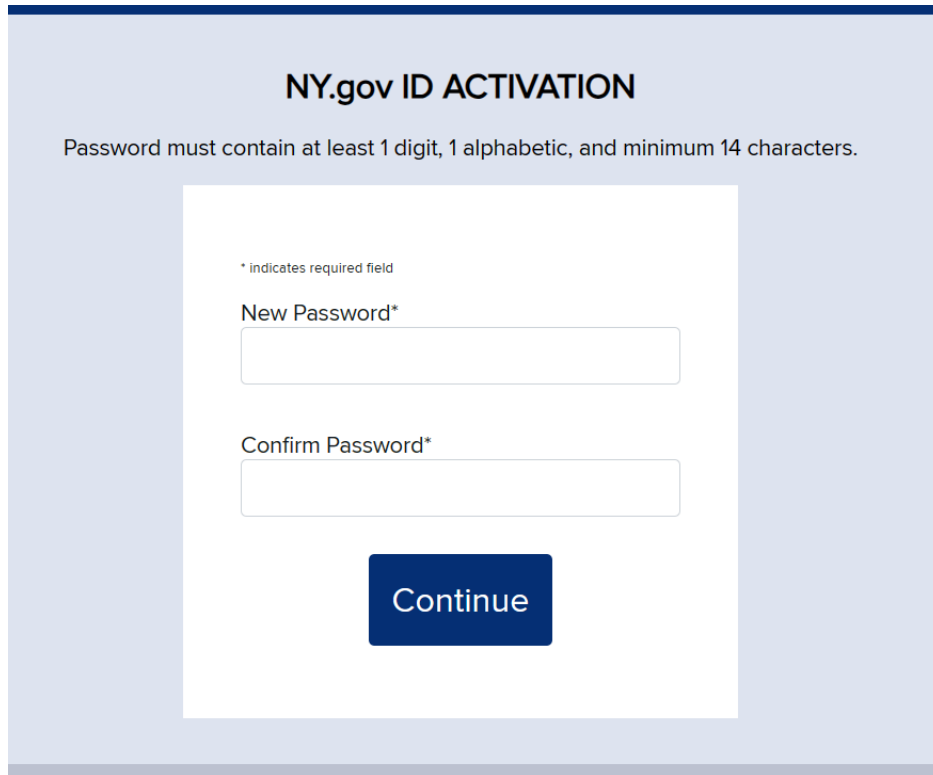
Figure 43: Set Password Prompt

Your password must contain at least one number and one letter and must be a minimum of 14 characters.
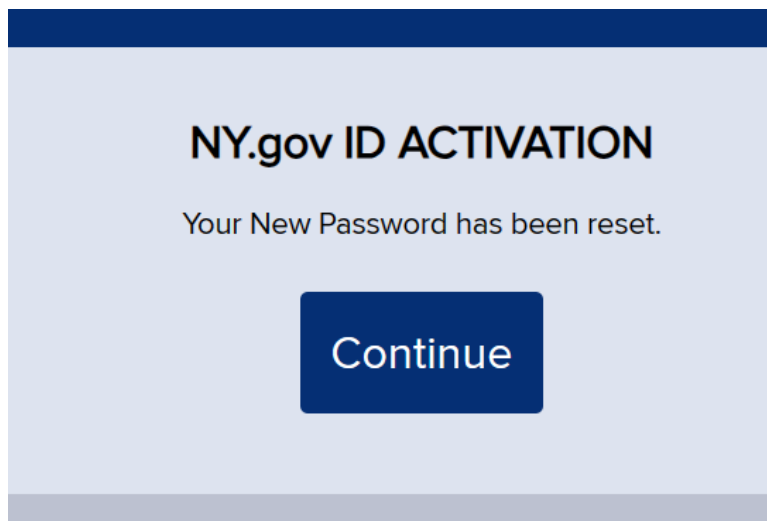
Figure 44: Set Your My.NY.gov Password
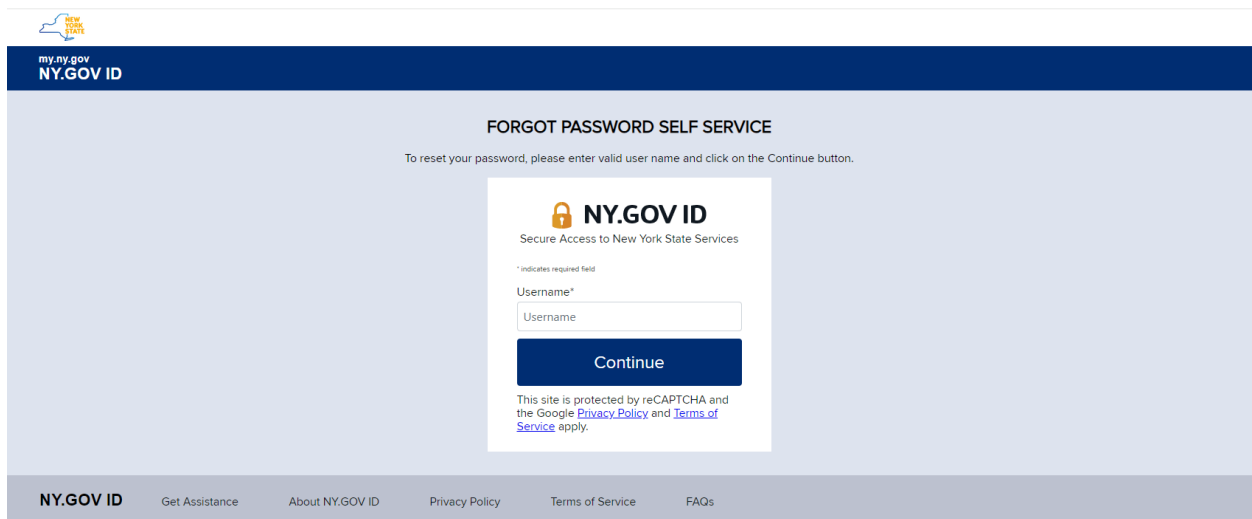
Figure 45: Password Confirmation

Reactivate your account

If it has been a while (more than 90 days) since your last log in to a New York State application using My.NY.gov, you will need to reactivate your account. You may also follow these steps if you need to change your password.
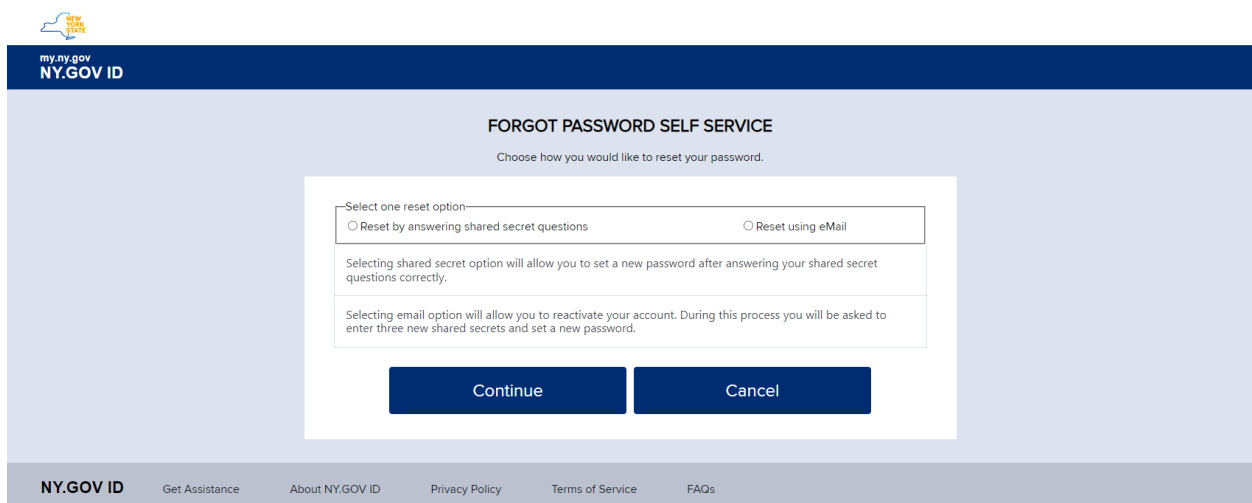
1. Go to My.NY.gov
2. Click on the Forgot Password link to access the Forgot Password Self Service
3. Enter your username and click the "Continue" button

Figure 46: My.NY.gov Forgot Password Self Service

4. Select the option to "Reset using eMail" and click the "Continue" button.

Figure 47: My.NY.gov Reset Method Selection

You will then be walked through the process to reset your password, which will also reactivate your account if it has been a while since you last logged in.
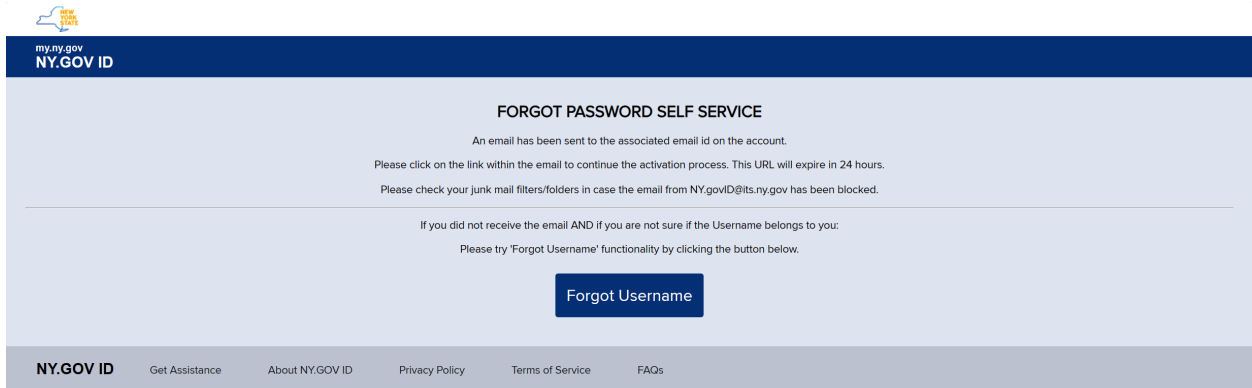

Figure 48: My.NY.gov Forgotten Password Self Service

5. You will receive an email in the account connected with your My.NY.gov account in approximately three minutes. Click on the "click here" link in the email to reactivate your account. The steps will be very similar to when you created your account originally.
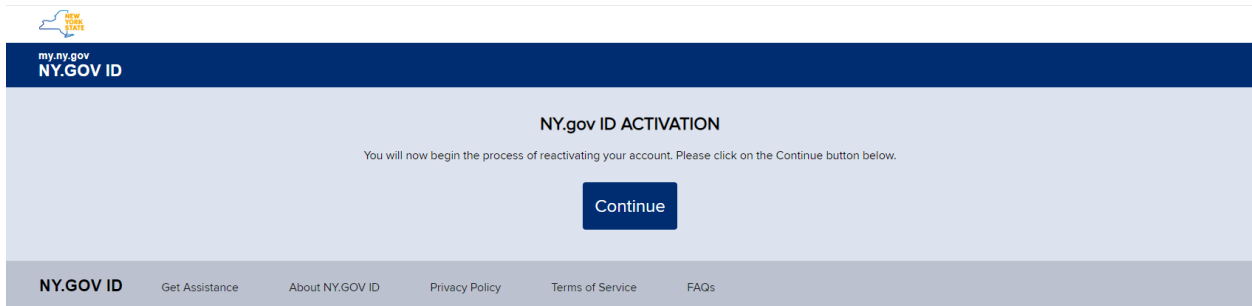

Figure 49: My.NY.gov ID Activation

6. Click on the "Continue" button and you will be prompted to select your secret questions and answers; these can be the same as previously selected.

Figure 50: My.NY.gov Activation - Secret Questions

7. After you have selected your secret questions and provided answers, click the "Continue" button and you will be prompted to reset your password. Click the "Continue" button to reset your password.
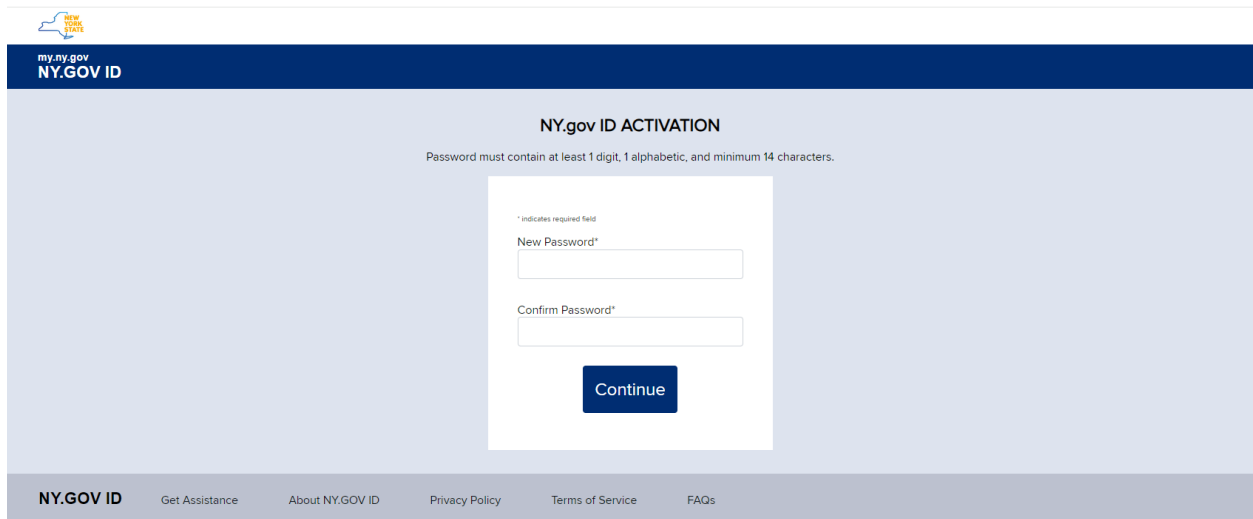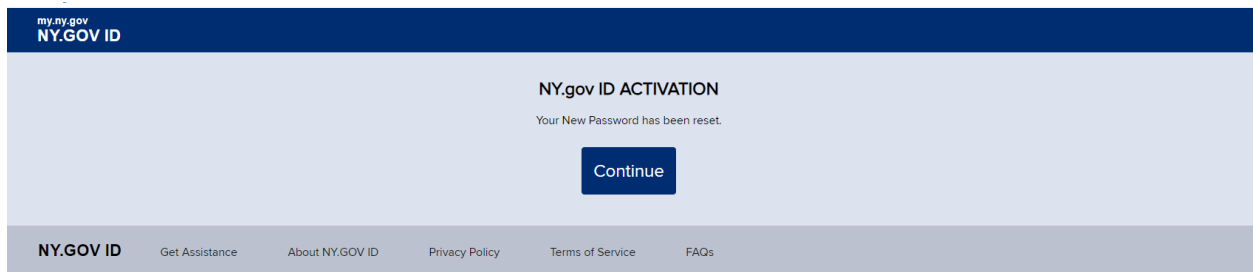

Figure 51: My.NY.gov Activation - Set Password

8. You will be prompted to set a new password. It cannot be the same as a previous password. It must contain at least one number and one letter and must be a minimum of 14 characters for security purposes. You can use special characters.

Figure 52: My.NY.gov Activation New Password

9. Click on the "Continue" button and you will receive a success message.

Figure 53: My.NY.gov Password Successfully Reset

Update my account

If you need to update the last name or email address associated with your My.NY.gov account, log in to https://My.NY.gov and you will see the dashboard.

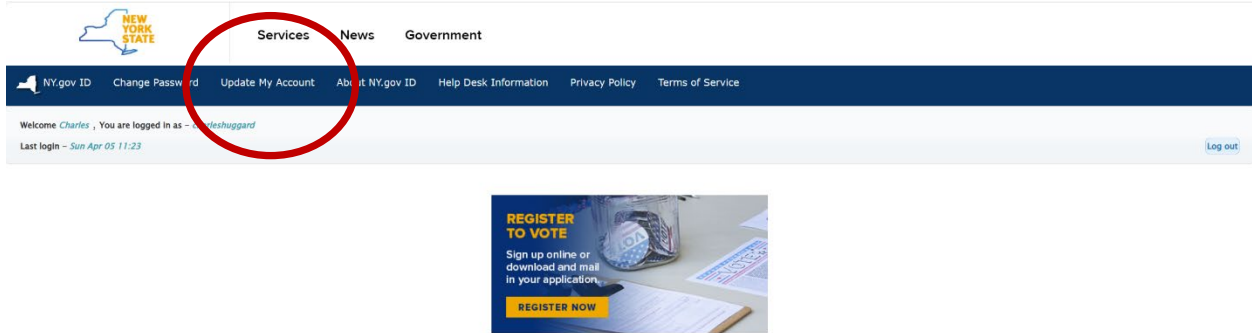1. On the dashboard, click on the menu item "Update My Account" as shown below.

Figure 54: My.NY.gov Dashboard Showing Update My Account

2. Update the information as necessary. Note: You cannot change your username, first name or date of birth.

You can also change your secret questions and answers here. When complete, click the "Modify Account" button.

3. You will have an opportunity to review both Account Update and Password Reset Information (secret questions and answers). Then this pop up will appear:
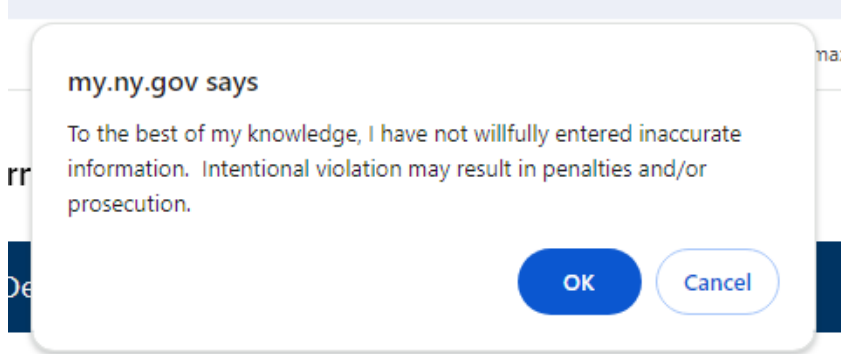

my.ny.gov says

To the best of my knowledge, I have not willfully entered inaccurate information. Intentional violation may result in penalties and/or prosecution.

OK   Cancel

Figure 55: Attestation

4. Click the "OK" button to save your updates and continue. You will receive the confirmation shown below.

NY.gov ID   Online Services   FAQs   About NY.gov ID   Help Desk Information   Privacy Policy   Terms of Service

Log Out

NY.gov ID ACCOUNT UPDATE

Your account has been successfully modified! For security purposes please close this window.

Copyright © 2023 - New York State Office of Information Technology Services (ITS)   Build: 01/10/2023 5:01 PM   Web: (NULL) App: 169PA_1

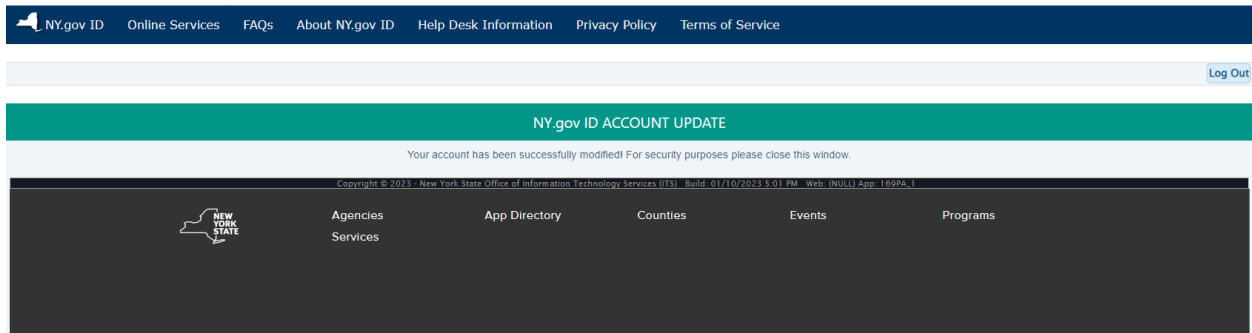Agencies   App Directory   Counties   Events   Programs
Services

Figure 56: My.NY.gov Account Update Confirmation