

# WOTC Quick Start Guide

This guide has been designed to walk through the basic features of our Work Opportunity Tax Credit (WOTC) program. For more information, visit the ***Help Center***,

## Qualifying Recipients

The following groups of people may qualify for a WOTC tax credit ranging between \$2,400 and \$9,600.

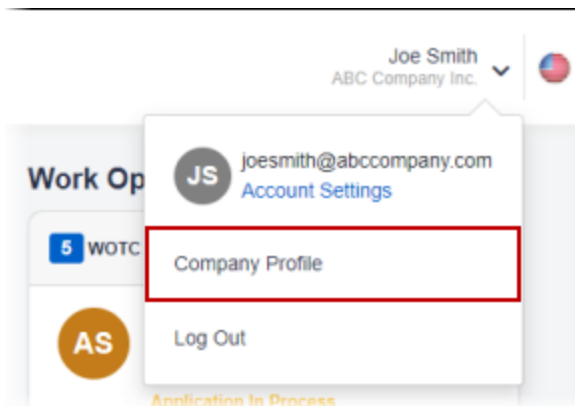
**Note:** Only new hires are eligible for these credits; existing employees and rehires are not eligible.

- Qualified Temporary Assistance for Needy Families (TANF) IV-A recipient
- Qualified veteran
- Ex-felon
- Designated Community Resident (DCR)
- Vocational rehabilitation referral
- Supplemental Nutrition Assistance Program (SNAP) recipient
- Supplemental Security Income (SSI) recipient
- Long-term family assistance recipient
- Qualified long-term unemployment recipient

## Enable WOTC

**Tip:** Pre-screen candidates for WOTC when using the Hiring application to identify those that are potentially WOTC-eligible before you engage directly with them.

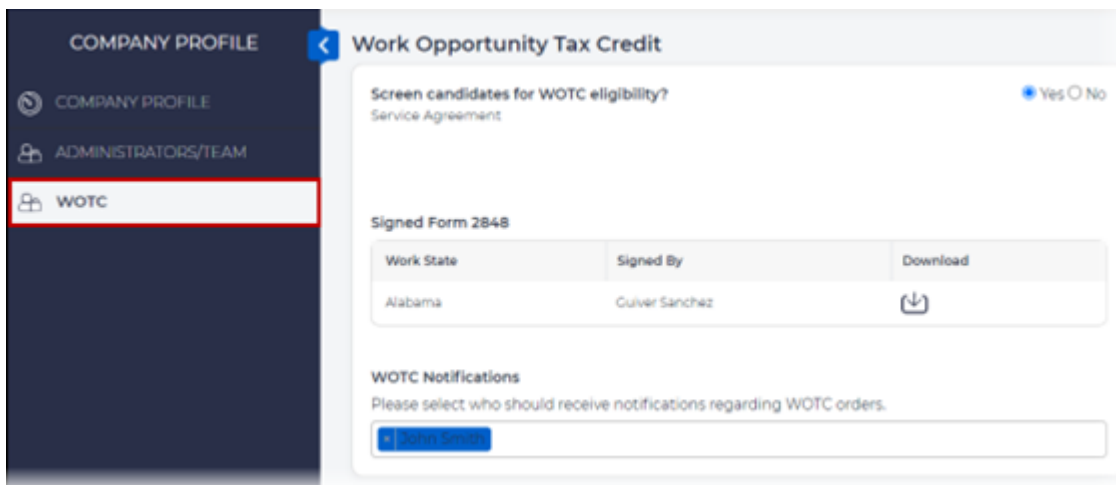
- 1) At the top right corner of the page, select the down arrow next to your user name, then select **Company Profile**.



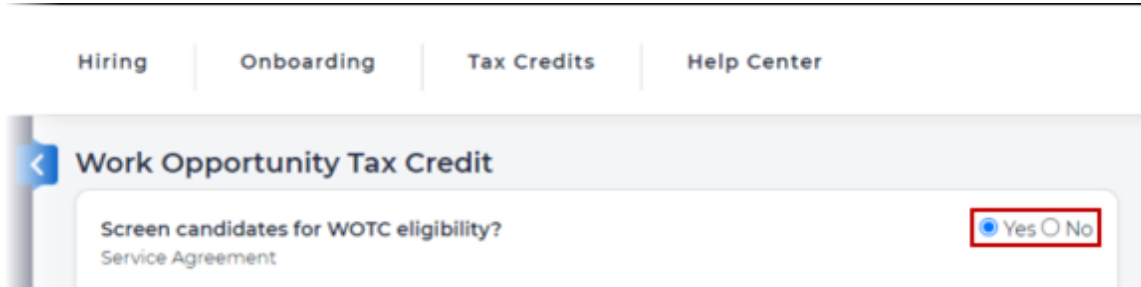
The Company Profile Information page opens.

- 2) Select **WOTC**.

The Work Opportunity Tax Credit page opens.



- 3) Set the **Screen candidates for WOTC eligibility** option to **Yes**.  
This ensures that candidates are automatically screened for WOTC eligibility.



- 4) Select **Review and E-Sign Form 9198**.  
The **Review and Sign Form** box opens.

## Review & Sign Form

This employer representative authorization form authorizes GetHired to represent your company for WOTC purposes. In order for us to file applications and necessary documentation with the State Workforce Agency (SWA) on your behalf, and to calculate your eligible tax credits, an authorized individual at your company must sign this form.

### Company Information

|                                                     |                                                    |
|-----------------------------------------------------|----------------------------------------------------|
| <b>First Name</b>                                   | <b>Last Name</b>                                   |
| <input type="text" value="stgtest"/>                | <input type="text"/>                               |
| <b>Title</b>                                        | <b>Email</b>                                       |
| <input type="text"/>                                | <input type="text" value="stgtest@gmail.com"/>     |
| <b>Firm/Company Name</b>                            | <b>Tax Identification Number (EIN)</b>             |
| <input type="text" value="Allure Care Management"/> | <input type="text"/>                               |
| <b>Company Mailing Address Line 1</b>               | <b>Company Mailing Address Line 2</b>              |
| <input type="text"/>                                | <input type="text"/>                               |
| <b>City</b>                                         | <b>State</b>                                       |
| <input type="text"/>                                | <input type="text" value="Select"/>                |
| <b>Zip Code</b>                                     | <b>Telephone Number</b>                            |
| <input type="text"/>                                | <input type="text"/>                               |
| <b>Fax Number</b>                                   | <b>501(c) Nonprofit Organization ?</b>             |
| <input type="text"/>                                | <input type="radio"/> Yes <input type="radio"/> No |

### Enable Auto Processing

☐ No ☒ Automatically process WOTC applications for eligible employees

## WOTC Service Agreement

☐ By checking the box, I indicate that I have read and agree to the terms of the [WOTC Service Agreement](#).

Cancel

Sign Form

Enter your information.

- 5) If you want to automate the WOTC process, select the check box that indicates that GetHired will automatically process work opportunity tax credit orders for new hires for a flat fee.

**Note:** If you decide to leave this check box clear to indicate you will be placing orders manually, keep in mind the 28 day window to file WOTC orders as they cannot be filed retroactively if you miss the deadline. For more information, visit the **Help Center**,

- 6) Once you have completed the form and determined that you agree with the service agreement, select **Sign Form 9198**.

×

## Add your signature

 Draw

 Type

 Upload

×

I understand this is a legal representation of my signature.

Insert

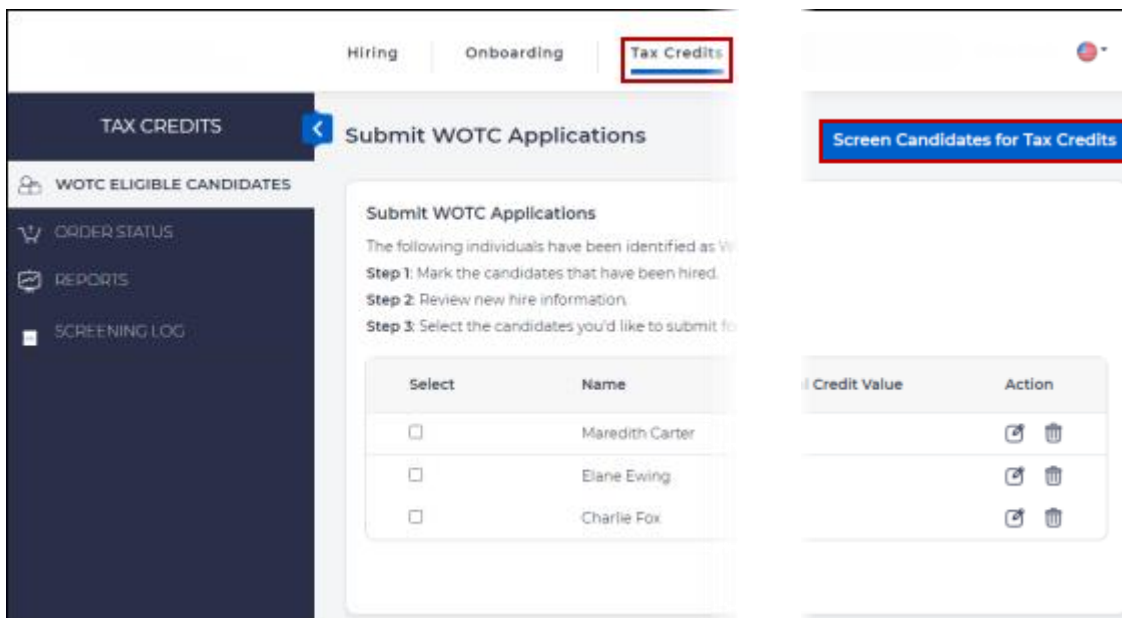
An add your signature box opens prompting you for your CPA's information.

- 7) Enter your CPA's information, making sure you select the check box indicating you agree to allow your Certified Public Accountant (CPA) or accountant to receive the information necessary to complete form 5884, and then select **Submit**.

You can then download the completed 2848 Power of Attorney (POA) and Declaration of Representative form.

## Screen Candidates Manually

- 1) From the main menu, select **Tax Credits**, and then select **Screen Candidates for Tax Credits**.



The Screen Candidates for Tax Credit box opens.

The screenshot shows the 'Screen Candidates for Tax Credit' modal form. The form has a title bar with the text 'Screen Candidates for Tax Credit' and a close button (X). Below the title bar, there is a paragraph of text: 'Automatically screen your new hire for tax credits worth up to \$9,600. Screening for tax credit eligibility is free. GetHired will send your new hire a short questionnaire and alert you if you are eligible to receive a tax credit.' Below this text, there is a section titled 'New Hire's Information:'. This section contains four input fields: 'First Name', 'Last Name', 'Job Title', and 'Email address'. Below these fields, there is a 'Mobile Number' field. At the bottom of the form, there is a button labeled 'Screen for Tax Credits' which is highlighted with a red box. Below the button, there is a link that says 'Have multiple candidates to screen? Upload File to Screen Candidates'.

- 2) Enter the candidate's information, and then select **Screen for Tax Credits**.

A WOTC questionnaire is sent to the candidate to be completed and submitted. Once it is processed, you will be notified by email whether the candidate qualifies for WOTC.

## Submit WOTC Applications

Once you have a WOTC eligible candidate, you can submit the WOTC order for them.

- 1) From the main menu, select **Tax Credits**,

HiringOnboardingTax CreditsHelp Center

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Submit WOTC ApplicationsScreen Candidates for Tax Credits







Submit WOTC Applications

The following individuals have been identified as WOTC eligible.

Step 1: Mark the candidates that have been hired.

Step 2: Review new hire information.

Step 3: Select the candidates you'd like to submit for WOTC and complete authorization documents.

| Select                              | Name            | Position                 | Potential Credit Value | Action                                                                                                                                                                  |
|-------------------------------------|-----------------|--------------------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> | Meredith Carter | Administrative Assistant | \$9,600                |   |
| <input checked="" type="checkbox"/> | Elane Ewing     | Administrative Assistant | \$2,400                |   |
| <input type="checkbox"/>            | Charlie Fox     | Administrative Assistant | \$5,400                |   |

Submit WOTC

- 2) In the **Select** column, select the check box for each candidate you want to submit a WOTC application for.

For each candidate you select, a **Confirm New Hire Dates** box opens.

### Confirm New Hire Dates

Please complete the following information for your new hire.

|                                                            |                                                                                                                                          |
|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Date the candidate completed the tax credit questionnaire: | <input type="text" value="05/11/2021"/>                                                                                                  |
| Date the job offer was made:                               | <input type="text" value="05/04/2021"/>                                                                                                  |
| Date the candidate accepted the job offer:                 | <input type="text" value="05/08/2021"/>                                                                                                  |
| Date of candidate's first day on the job:                  | <input type="text" value="05/25/2021"/>                                                                                                  |
| Starting wage:                                             | <div><div>\$</div><div><input type="text" value="54"/></div><div>Per</div><div><input type="text" value="hour"/></div><div>▼</div></div> |
| Position:                                                  | <input type="text" value="Administrative Assistant"/>                                                                                    |
| Your company's industry:                                   | <input type="text" value="Legal"/>                                                                                                       |
| State the employee will work in:                           | <input type="text" value="New York"/>                                                                                                    |

Have questions about eligibility criteria? Please contact GetHired at (888) 320-4456 to learn more.

- 3) Complete the hire date information for the candidate, and then select **Save** to close the box.
- 4) Select **Submit WOTC**.
- 5) Complete and then select **Submit Order**.