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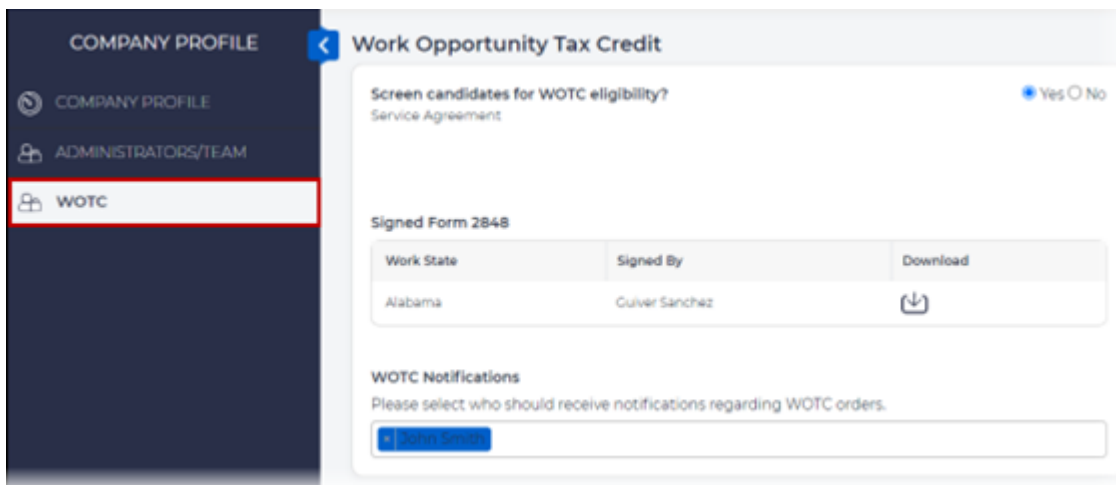
1) At the top right corner of the page, select the down arrow next to your user name, then select **Company Profile**.
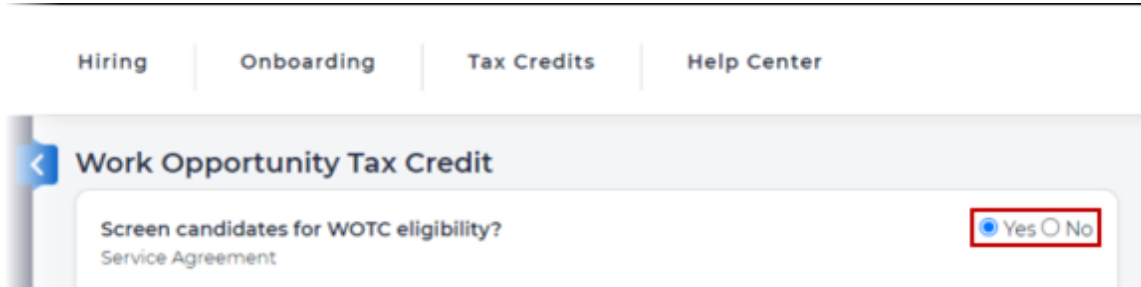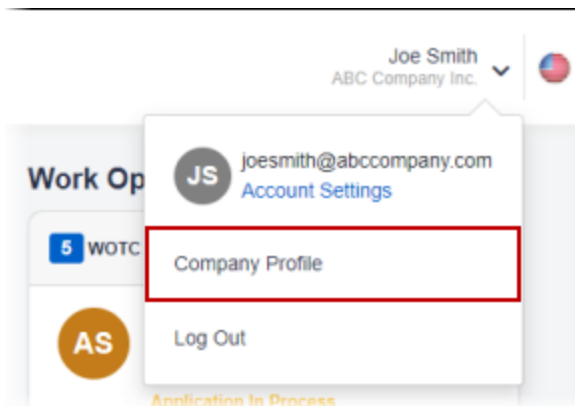

The Company Profile Information page opens.

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.

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

✕ _____

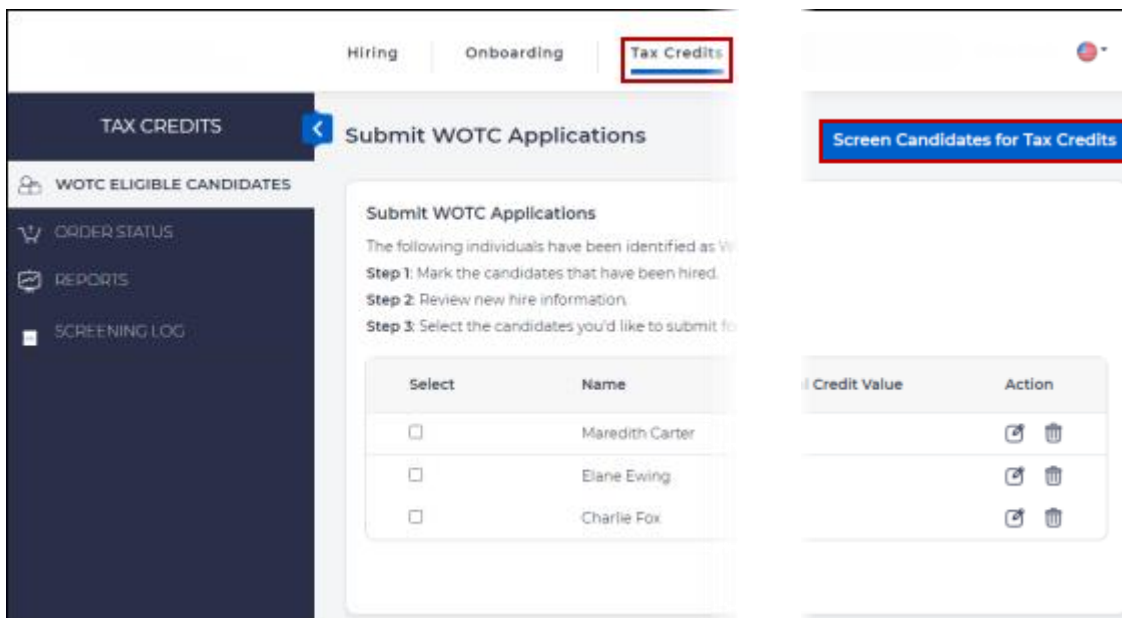I understand this is a legal representation of my signature.   Insert

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.

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**,

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:	05/11/2021
Date the job offer was made:	05/04/2021
Date the candidate accepted the job offer:	05/08/2021
Date of candidate's first day on the job:	05/25/2021
Starting wage:	$ 54 Per hour ⌄
Position:	Administrative Assistant
Your company's industry:	Legal ⌄
State the employee will work in:	New York ⌄

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

Cancel   Save

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**.