

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.

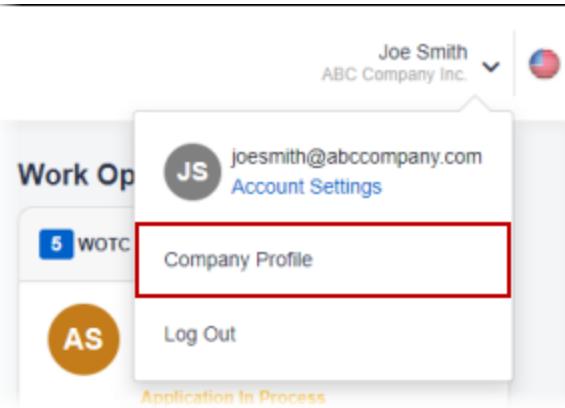
Note: Only new hires are eligible for these credits; existing employees and rehires are not eligible.

- 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.

- 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.

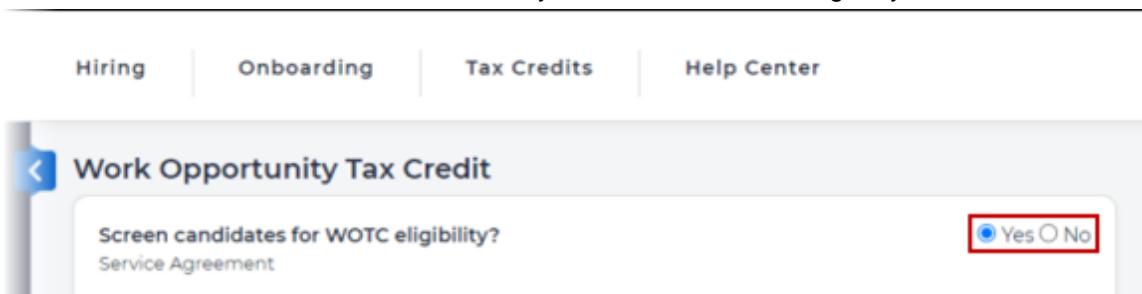
- Select **WOTC**.

The Work Opportunity Tax Credit page opens.

The screenshot shows the 'Work Opportunity Tax Credit' page. On the left, a sidebar has three tabs: 'COMPANY PROFILE', 'ADMINISTRATORS/TEAM', and 'WOTC', with 'WOTC' highlighted with a red box. The main content area has a heading 'Work Opportunity Tax Credit'. It contains a section for 'Service Agreement' with a radio button for 'Yes' (which is selected) and 'No'. Below this is a 'Signed Form 2848' section with a table showing 'Work State' as 'Alabama' and 'Signed By' as 'Guiver Sanchez'. There is a 'Download' button next to the table. At the bottom, there is a 'WOTC Notifications' section with a note: 'Please select who should receive notifications regarding WOTC orders.' A text input field contains the name 'John Smith'.

3) Set the **Screen candidates for WOTC eligibility** option to **Yes**.

This ensures that candidates are automatically screened for WOTC eligibility.



The screenshot shows a navigation bar with tabs: Hiring, Onboarding, Tax Credits, and Help Center. Below the navigation bar is a section titled 'Work Opportunity Tax Credit'. Inside this section, there is a question 'Screen candidates for WOTC eligibility?' followed by two radio buttons: 'Yes' (selected) and 'No'. The 'Yes' button is highlighted with a red box.

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

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

Enable Auto Processing

<input type="radio"/> No	Automatically process WOTC applications for eligible employees
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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**.

X

Add your signature

 Draw

 Type

 Upload

X

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

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

The screenshot shows the 'Submit WOTC Applications' page. The 'Tax Credits' tab is active in the top navigation. On the right, a red box highlights the 'Screen Candidates for Tax Credits' button. The main content area shows a table with three rows of candidates: 'Meredith Carter', 'Elaine Ewing', and 'Charlie Fox'. Each row has a checkbox in the 'Select' column and icons for 'Edit' and 'Delete' in the 'Action' column.

The Screen Candidates for Tax Credit box opens.

The dialog box is titled 'Screen Candidates for Tax Credit'. It contains the following 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.

New Hire's Information:

First Name <input type="text" value="First Name"/>	Last Name <input type="text" value="Last Name"/>
Job Title <input type="text" value="Job Title"/>	Email address <input type="text" value="Email"/>
Mobile Number <input type="text" value="Mobile number"/>	

Screen for Tax Credits

Have multiple candidates to screen? [Upload File to Screen Candidates](#)

- 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**,

Submit WOTC Applications

Screen Candidates for Tax Credits

Select	Name	Position	Potential Credit Value	Action
<input checked="" type="checkbox"/>	Maredith 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:	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.

- 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**.
