

Work Opportunity Tax Credit

External Users Instruction Manual



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1. **Document Information**

This section of the document provides information about the document itself, or the document meta-data, to allow for easier usage of this user manual. The document information seeks to describe the purpose of the document, its authors, audience, and any important information that users should know prior to reading this manual.

1.1. **Purpose**

The purpose of this document is to provide external users of the Work Opportunity Tax Credit Program (WOTC) with information on how to use the external portal. This manual will provide a high-level overview of the system, its processes, and the specifics of system functionality.

1.2. **Version History**

Date	Version	Author	Description
05/20/2019	Draft 1	Naren Willingiri SGS Technologie	An outline of the document with section descriptions, completed meta-data and system overview

1.3. **Audience**

The target audiences for this manual are Employers and Consultants who would apply through WOTC application to claim their tax credit.

1.4. **Reading and Usage**

The following sections include information that may help you in the reading and usage of this manual.

1.4.1. **The Work Opportunity Tax Credit**

The Work Opportunity Tax Credit (WOTC) is a federal tax credit intended to incentivize employers to hire individuals from targeted groups to help them re-enter the workforce.

A complete description of WOTC is beyond the scope for this manual. But as the cornerstone of WAM, it is important to understand the WOTC program.

To read more about WOTC, visit the US Dept. of Labor's website:

<http://www.doleta.gov/business/incentives/opptax/>

1.4.2. **Key Terms**

Following are several of the key terms to understand prior to reading through this manual:

Application - A request to certify an employee as a member of a Target Group and eligible for the WOTC. You may see this referred to as a ‘certification request’.

Consultant - A third party who has been granted Connection Request or Power of Attorney (POA) by an Employer to submit WOTC Applications and to represent the Employer in the Application process.

Employer - An entity with a Federal Employer Identification Number (FEIN) who has applied.

Employee - An entity with an SSN who is claimed by an Employer on an Application as a member of a Target Group that would entitle the Employer to receive the WOTC. Information about the Employee is entered into the WOTC database as part of each Application.

Control Number – Each Application submitted by an Employer, Consultant or State Coordinators will have a unique identifier called Control Number.

1.4.3. **User Registration**

WOTC External Portal is available for the public to register and create their accounts:

Employer	Consultant
Permitted	Permitted

1. Go to <https://wotc.floridajobs.org>.
2. Click on ‘Create an Account’
3. Choose your User Role and select ‘Click to Register’ button

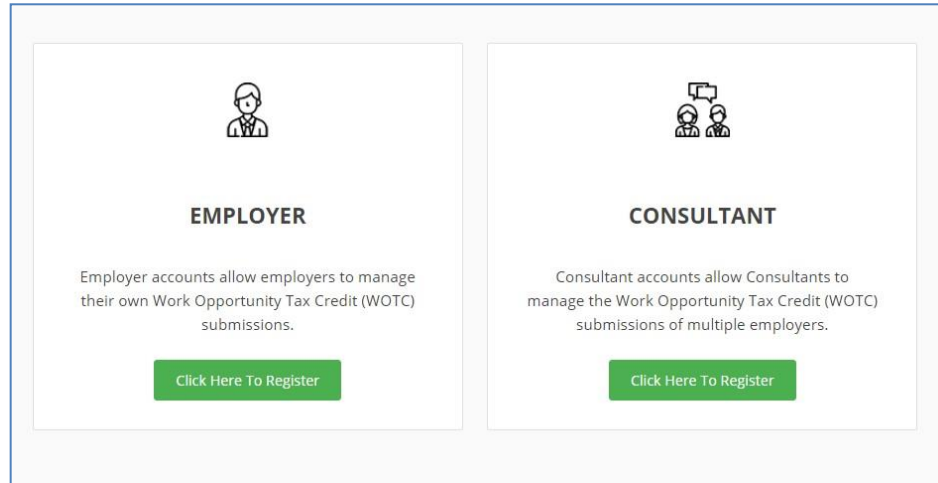


Fig 1.4.3.1: User Roles

4. Fill in the information requested in Employer / Consultant Registration Screens.

Note: Based on your User role selection, registration information may vary.

The screenshot shows the 'Consultant Registration' form. At the top, a progress bar indicates five steps: 1. Consultant Information (active), 2. Address Information, 3. Profile, 4. Agreements, and 5. Submit. Below the progress bar, the 'Consultant Information' section contains the following fields: FEIN * (text input), Company Name * (text input), Contact First Name * (text input), Contact Middle Initial (text input), and Contact Last Name * (text input). A green 'Next' button is located at the bottom center of the form.

Fig 1.4.3.2: Consultant Registration Screen

The screenshot shows the 'Employer Registration' form. At the top, a progress bar indicates five steps: 1. Employer Information (active), 2. Address Information, 3. Profile, 4. Agreements, and 5. Submit. Below the progress bar, the 'Employer Information' section contains the following fields: FEIN * (text input), Company Name * (text input), Contact First Name * (text input), Contact Middle Initial (text input), and Contact Last Name * (text input). A green 'Next' button is located at the bottom center of the form.

Fig 1.4.3.3: Employer Registration Screen

5. Fill the following sections. Click 'Next' if one section is completed and if you would like to proceed to the Next section.
 - a. Consultant / Employer Information
 - b. Address Information
 - c. Profile
 - d. Agreements
 - e. Submit

The screenshot shows a web form with the following fields:

- FEIN * (required)
- Company Name * (required)
- Contact First Name * (required)
- Contact Middle Initial
- Contact Last Name * (required)

A green button labeled "Next" is positioned at the bottom center of the form area.

Fig 1.4.3.4: Consultant / Employer Information Screen

FEIN	Federal Employer Identification Number.
Company Name	Type the Entity Name.
Contact First Name	Contact Person's First Name.
Contact Middle Initial	Type the first letter of the Contact Person's middle initial.

6. Enter the Address information of a Consultant or Employer based on the user role you chose.

Fig 1.4.3.5: Address Information Screen

Primary Address

Address line 1	The address of the Employer / Consultant.
Address line 2	Additional Employer / Consultant address information.
City	The city of the Employer / Consultant.
State	Select your State from the dropdown.
ZIP Code	The zip code of an Employer / Consultant.

Secondary Address

Same as Primary User	If no secondary Address information is present, click on this button.
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7. Fill this form to setup profile information of an Employer / Consultant.

The screenshot shows a multi-step form titled 'Profile Information Screen'. The steps are: 1. Consultant Information (checked), 2. Address Information (checked), 3. Profile (active), 4. Agreements, and 5. Submit. The 'Profile' section is divided into three sub-sections: 'Primary User Information' with fields for Primary User Name, Email Address of User, and Phone Number; 'Security Questions' with three dropdown menus for questions and corresponding text boxes for answers; and 'Profile Password' with fields for Password and Confirm Password. At the bottom, there are 'Previous' and 'Next' buttons.

Fig 1.4.3.6: Profile Information Screen

Primary User Information:

Primary Username	Choose a Username to log in to your account.
Email Address of User	Choose an email address that can be used in the future to retrieve your account information in case if you forget your Username or Password.
Phone Number	Enter your Contact Information.
Security Questions:	Select your State from the dropdown.
Security Questions 1, 2 and 3	Choose any 3 questions from this dropdown and set up an answer for the questions. You will need this information in the future to retrieve your account in case you don't remember your Username or Password.

Profile Password:

Password /
Confirm Password

Choose your Password that will be used to login to this account.

8. Read and agree with this security agreement. The previous button will take you back to the Profile Information screen.

Security Agreement

Use of Florida's electronic Work Opportunity Tax Credit (E-WOTC) application management system requires your agreement with the following TERMS AND CONDITIONS. If you are unable to certify or agree, as applicable, to each of these terms and conditions, you must instead comply with the terms and conditions applicable to mailing paper applications to the Florida WOTC unit.

- 1.) I certify that each electronic application I submit will be documented with an original, signed Internal Revenue Service (IRS) Form 8850 and Employment and Training Administration (ETA) Form 9061.
- 2.) I agree to be responsible for retaining each original, signed IRS Form 8850 and ETA Form 9061 I submit and for providing the applicable form to the IRS in the case of an audit.
- 3.) I agree to upload any required supporting documentation to the E-WOTC system. I agree to monitor the status of each application that I submit in the E-WOTC system.
- 5.) I understand that I will be responsible for printing my own determination letters for each application that I submit through the E-WOTC system.
- 6.) I understand that my unique login ID and password constitutes my electronic signature on each application that I submit through the E-WOTC system.
- 7.) I understand that I am required to make the declaration contained in the perjury statement on IRS Form 8850 and that by submitting these applications as a batch file, I am making that declaration for each application that I submit within the batch.

[Previous](#) [Disagree](#) [Agree](#)

Fig 1.4.3.7: Security Agreement Screen

9. Click Submit and check your email for an activation Link.

Hi 8F,

Please click [here](#) to verify your email address and to activate your account.

Thank You,
WOTC Support Team

Fig 1.4.3.8: Sample Activation Email Screen

1.4.4. User Login

Type the Username/Password you chose during registration and click Login.

Click Forgot Password or Forgot Username links if you need help with recovering the account information.

You will need your Email Address or FEIN number to recover your account.

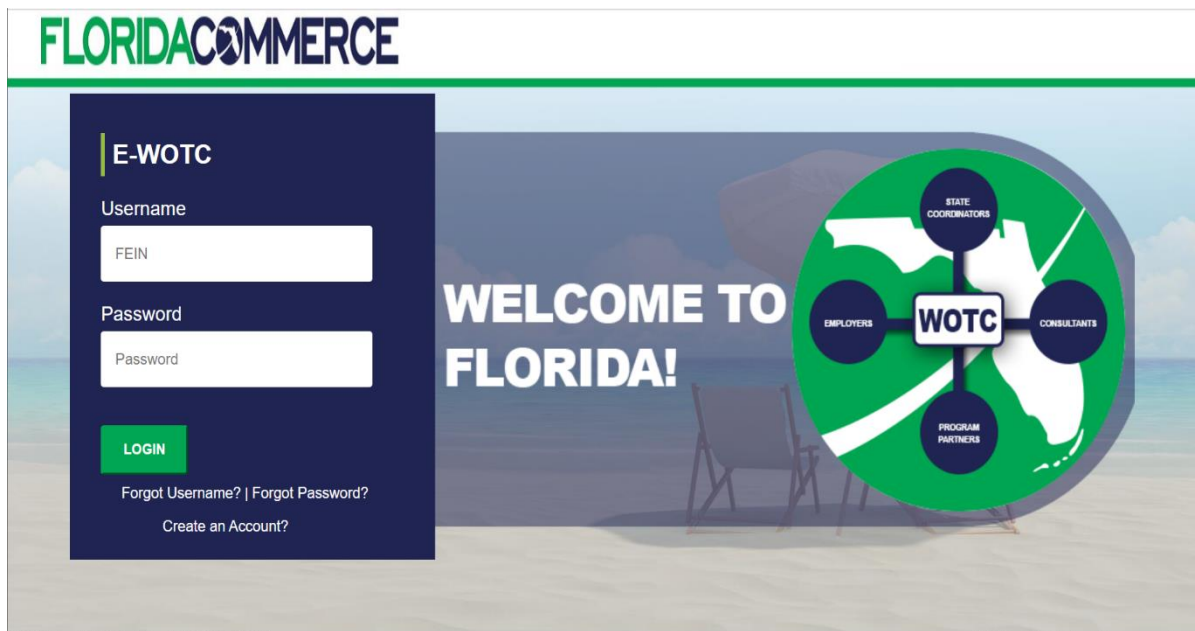


Fig 1.4.4.1: Login Screen

2. Dashboard

Employer	Consultant
Permitted	Permitted

Employers and Consultants both have their dashboards with access to the following information.

- Month in Review.
- Application Overview.
- Potential Savings.
- My Alerts.
- Manage Connections.
- Quick Links.

2.1. **Month in Review**

You can find information related to Total Applications submitted, Total Certified Applications, Total Pending Applications, and Total Denied Applications.

- Certified – Your application has been certified and you are eligible for Tax Credit.
- Pending – Your application is pending for review.
- Denied – Your application has been denied for one or more reasons.

You can search based on Year and Month to view the total Applications.

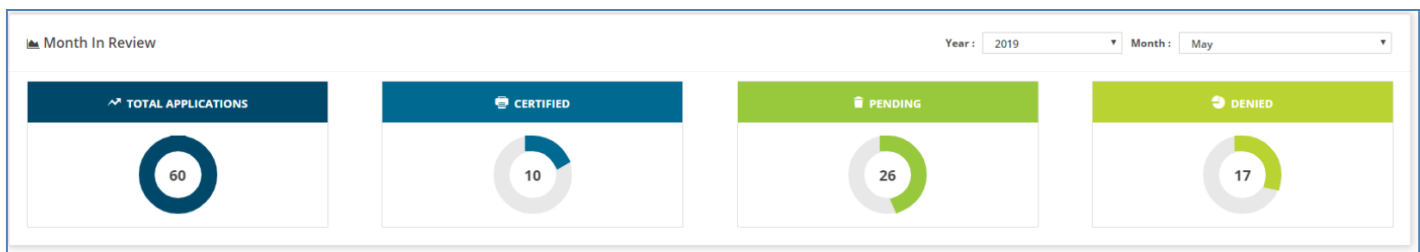


Fig 2.1.1: Month in Review Screen

2.2. Application Overview

This section will show you the number of applications you have submitted every month in a year.

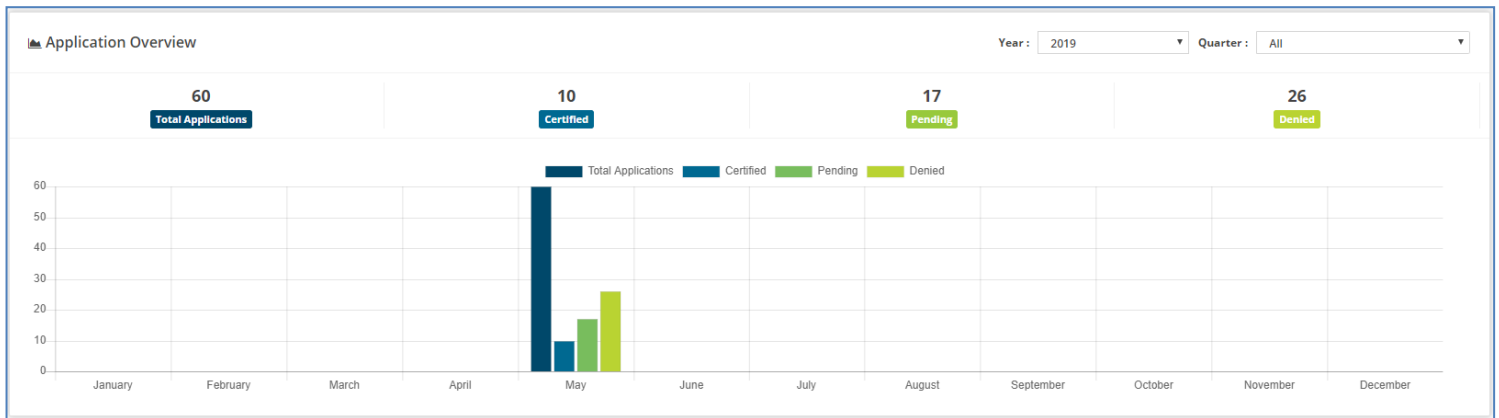


Fig 2.2.1: Application Overview Screen

2.3. Potential Tax Savings Overview

This section will show you the amount you have been offered credits for. You can also see the most certified Target Groups in any specific Year by placing the cursor on the chart at the left.

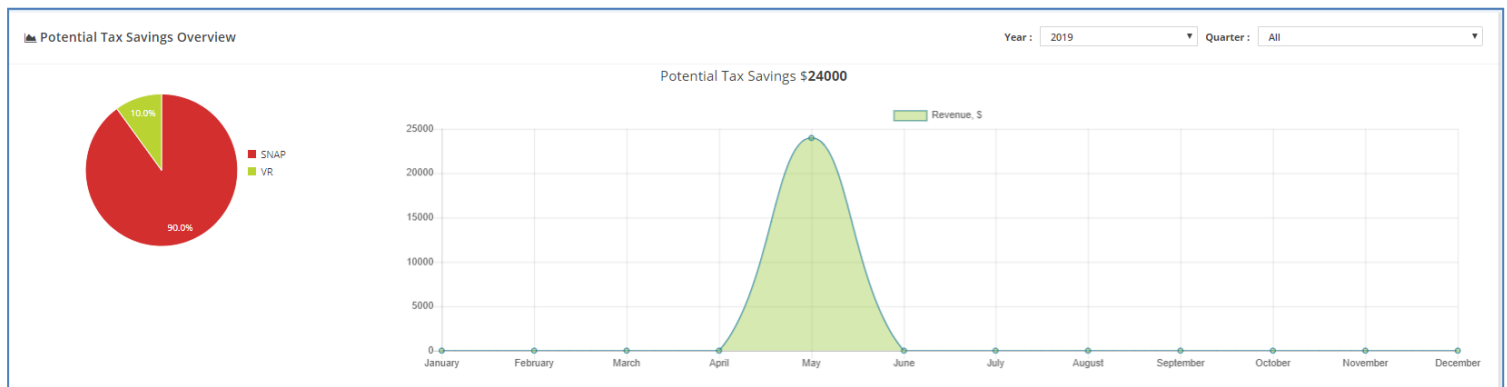


Fig 2.3.1: Potential Tax Saving Overview Screen

2.4. My Alerts

If there are any notifications regarding your application, you can find them under this section.

Below are the few notification alerts you may receive:

- Supporting Documentation Requirements
- Connection Requests approvals
- Status of an Application

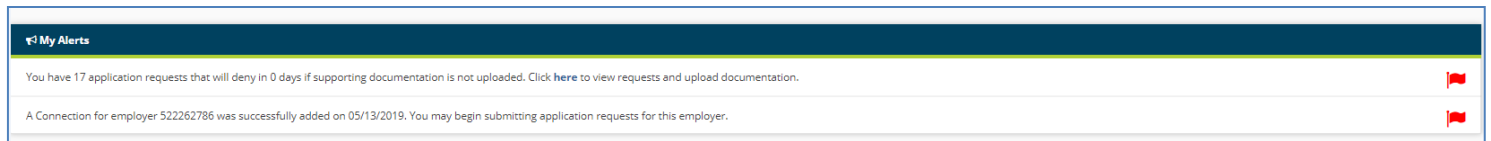


Fig 2.4.1: My Alerts Screen

3. Manage Applications

This tab will let you search, edit your applications or download determination letters.

Employer	Consultant
Permitted	Permitted

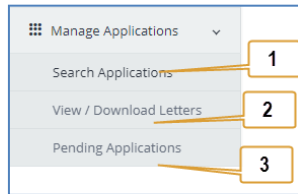


Fig 3.1: Manage Applications Screen

3.1. Search Applications

Employers or Consultants can search their applications based on FEIN, Employer Name, Control Number, Applicant SSN, Target Group, Status, or Submission Date. Clicking ‘Search’ will display results in the ‘Search Results’ section.

Search Options

FEIN <input type="text"/>	Employer Name <input type="text"/>	Control# <input type="text"/>
Applicant First Name <input type="text"/>	Applicant Last Name <input type="text"/>	Applicant SSN <input type="text" value="999-99-9999"/>
Target Group <input type="text" value="ALL"/>	Status <input type="text" value="ALL"/>	Received Date From <input type="text" value="MM/DD/YYYY"/>
		Received Date To <input type="text" value="MM/DD/YYYY"/>

Fig 3.1.1.1: Search Application Screen

Search Results

Per page: 10

Control#	Employer Name	FEIN	Applicant Name	Received Date	Created By	Status	Action
9	J.C. Penney Corporation, Inc.	135583779	Ron Tavia Watson	05/10/2019		Verifying Eligibility	
10	J.C. Penney Corporation, Inc.	135583779	Bryan Perez	05/10/2019		Denied	

Fig

3.1.1.2: Search Results Screen

3.2. View/Download Letters

You can download 8850/9061 letters in 2 ways.

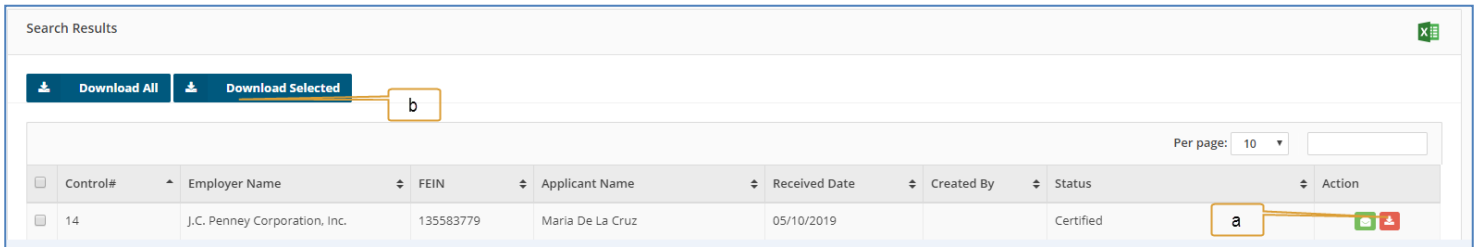


Fig 3.2.1: View Download Letters Screen

- a. Click the ‘Download’ button at the end of each application.
- b. Click ‘Download All’ or select multiple applications and click ‘Download Selected.’ button.

3.3. Pending Applications

Applications pending by WOTC Application Manager (WAM) will be displayed here. Clicking on a ‘Control Number’ of the application will open the form and show you the reason why it is pending.

All Search Results can be exported to excel.

You can search a pending application by its FEIN, Employer Name, Control Number, Applicant SSN, Target Group, Status, or Submission Date.

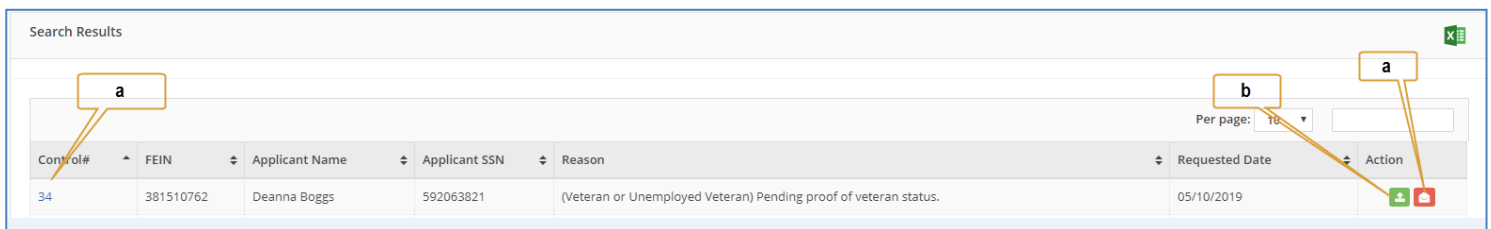


Fig 3.3.1: View Pending Application Screen

- a. Click any of these 2 items to open/view the application.
- b. Click on this to upload the supporting documents requested. This button will take you to the ‘Manage Documents’ screen.
- c. ‘Reason’ column will show you the reason why the application has been pending.

4. Submit Applications

This tab will let you submit new applications or complete your pending applications.

Employer	Consultant
Permitted	Permitted

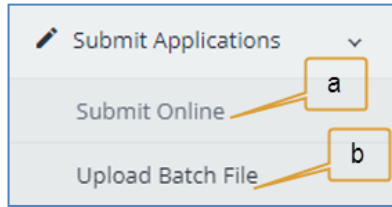


Fig 4.1: Submit Application Screen

- a. **Submit Online** – If you are submitting just one application online, click this tab.
- b. **Upload Batch File** – Larger employers and consultants who regularly submit multiple applications can use the batch application upload feature.

4.1. Submit Online

- a. Click ‘Submit New Application’ button to file a new application.
- b. If you have left an application incomplete, you can retrieve the same form and complete the process by clicking on the ‘Continue’ button.

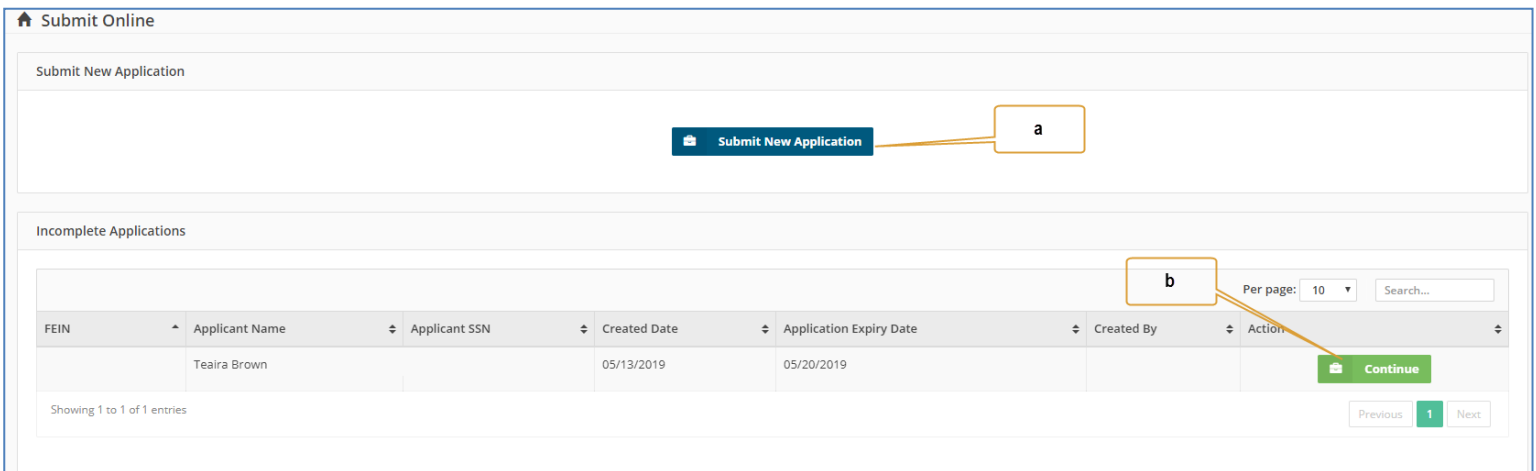


Fig 4.1.1: Submit Online Screen

Below sections must be fully completed in order to submit the application for WAM review:

- Employer and Job Information.
- Applicant Information.
- Target Group Information.
- Questionnaire.
- Electronic Signature, Review & Complete.

4.1.1. Employer and Job Information:

Most of the information for this screen will be auto populated based on Employer Name. You must have added Employer Location already in order to answer Employer Location Question. Click here to [Add a New Location](#).

The screenshot displays a multi-step application form. At the top, there are five numbered tabs: 1. Employer & Job Information (active), 2. Applicant Information, 3. Target Group Information, 4. Questionnaire, and 5. Electronic Signature, Review & Complete. The main content area is divided into three sections:

- Employer Information:** Contains two dropdown menus for 'Employer Name *' and 'Employer Location *'.
- Employer Address & Contact Information:** Contains multiple text input fields for 'Employer Name', 'Employer FEIN', 'Contact First Name', 'Contact Last Name', 'Location Name', 'Phone Number', 'Address Line 1', 'Address Line 2', 'City', 'State', and 'Zip Code'.
- Applicant Job Information:** Contains several dropdown and text input fields for 'Position Occupational Group *', 'Position Title *', 'Hourly Wage *', 'Date Applicant Was Offered Job *' (MM/DD/YYYY), 'Date Applicant Was Hired *' (MM/DD/YYYY), 'Date Applicant Started Job *' (MM/DD/YYYY), and 'Date Applicant Gave Information *' (MM/DD/YYYY).

A green 'Next' button is positioned at the bottom center of the form.

Fig 4.1.1.1: Submit Online – Employer & Job Information Screen

EMPLOYER INFORMATION

Employer Name	Choose Employer Name from this dropdown.
Employer Location	Choose Employer Location from this dropdown.

EMPLOYER INFORMATION & CONTACT INFORMATION

Employer Name	
Employer FEIN	
Contact First Name	
Contact Last Name	-----
Location Name	Most of this information will be filled automatically.
Phone Number	-----
Address Line 1	
Address Line 2	
City	
State	
Zip Code	

APPLICANT JOB INFORMATION

Position Occupational Group	The Position Occupational Group of the Employee.
Position Title	The position title for the employee.
Hourly Wage	The starting wage for the employee.
Date Applicant Was Offered Job	The date when the Applicant was offered a job.
Date Applicant Was Hired	The date when the employee was hired by the employer.
Date Applicant Started Job	The date when the employee started at the job.
Date Applicant Gave Information	Date when the applicant provided his/her job information.

4.1.2. Applicant Information:**APPLICANT INFORMATION**

Employee First Name	First name of the employee.
Employee Last Name	Last name of the employee.
Enter Applicant's Date of Birth	Date of birth of the employee.
Social Security Number	The Social Security Number of the employee.
Phone Number	Phone Number of the Employee.

Address Line 1	The address of the employee.
Address Line 2	Additional employee address, information that belongs on the second line of an address or did not fit into line 1.
State	State where the Employee resides.
County	County where the Employee resides.
City	The city of the employee.
Zip Code	The Zip Code of the employee.
Has the applicant received a conditional certification from the SWA or a participating Local Agency for the Work Opportunity Tax Credit?	Choose 'Yes' or 'No'.
Has the applicant ever worked for you before?	Choose 'Yes' or 'No'.

4.1.3. Target Group Selection:

If you are sure which Target Group you like to claim a tax credit for, choose those Groups. If you are not sure, select 'Click Here' button so the application will ask for a series of questions and help you decide eligibility.

Please select the applicant's target group(s) below

Do you need assistance selecting a target group?
Click Here

<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> IV-A Short-Term TANF Short-Term Temporary Assistance to Needy Families Recipient <input checked="" type="checkbox"/> </div>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> V-SNAP Veteran-Supplemental Nutrition Assistance Program Recipient <input type="checkbox"/> </div>
<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> Ex-Felon Ex-Felon <input type="checkbox"/> </div>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> VR Vocational Rehabilitation Referral <input type="checkbox"/> </div>
<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> Summer Youth Summer Youth <input type="checkbox"/> </div>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> SNAP Supplemental Nutrition Assistance Program Recipient <input checked="" type="checkbox"/> </div>
<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> SSI Supplemental Security Income Recipient <input type="checkbox"/> </div>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> Long-Term TANF Long-Term Temporary Assistance to Needy Families Recipient <input checked="" type="checkbox"/> </div>
<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> DV-Unemployed 6 Mos Disabled Veteran - Unemployed 6 months <input type="checkbox"/> </div>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> DCR Designated Community Resident <input type="checkbox"/> </div>
<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> TTW Ticket to Work Holder <input type="checkbox"/> </div>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> V-Unemployed 4 Wks Unemployed Veteran 4-Weeks <input type="checkbox"/> </div>
<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> V-Unemployed 6 Mos Unemployed Veteran 6-Months <input type="checkbox"/> </div>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> DV-1 Yr Disabled Veteran-1 Year <input type="checkbox"/> </div>
<div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> LTUR Long-Term Unemployment Recipient <input type="checkbox"/> </div>	

Fig 4.1.3.1: Target Group Screen

You can also uncheck a Target Group and proceed to the next screen by clicking 'Next' button. Based on your selection, questions will load.

Short Term Family Assistant Recipient (Short Term TANF)

This target group refers to any person who is a member of a family receiving Temporary Assistance for Needy Families (TANF) benefits for any nine months during the 18-month period ending on the hire date.

Veterans

To be considered a qualified veteran under the WOTC program an individual must meet these two requirements:

1. Have served on active duty (not including training) in the U.S. Armed Forces for more than 180 days or have been discharged or released from active duty for a service-connected disability; **and**

2. Cannot have a period of active duty (not including training) of more than 90 days that ended during the 60-day period ending on the hire date.

Veteran Receiving SNAP Benefits (SNAP Veterans)

This target group refers to any qualified veteran who is a member of a family receiving Supplemental Nutrition Assistance Program (SNAP) benefits for at least a 3-month period during the last 15 months ending on the hire date.

Disabled Veterans

This target group refers to any qualified veteran as entitled to compensation for a service-connected disability **and** has a hire date which is not more than one year after having been discharged or released from active duty in the U.S. Armed Forces.

Long-Term Unemployed Veteran

This target group refers to any qualified veteran as entitled to compensation for a service-connected disability **and** has aggregate periods of unemployment of 6 months or more during the one-year period ending on the hire date.

Short-Term Unemployed Veteran

This target group refers to any qualified veteran as having aggregate periods of unemployment of at least 4 weeks but less than 6 months in the year prior to being hired.

Long-Term Unemployed Veteran

This target group refers to any qualified veteran as having aggregate periods of unemployment of 6 months or more in the year prior to being hired.

Ex-Felons

This target group refers to any person who has been convicted of a felony **and** who is hired within 1 year after the conviction date or release date from prison.

Designated Community Residents

This target group refers to any person who is at least age 18, but not yet age 40, on the hire date **and** has his/her principal place of abode within an Urban/Rural Empowerment Zone (EZ).

Vocational Rehab Referral

This target group refers to any person with a disability who completed or is completing rehabilitative services from a State certified agency, an Employment Network under the Ticket to Work program, or the U.S. Department of Veteran Affairs within two years of the hire date.

Summer Youth Employee

This target group refers to any person who:

- Is age 16 but not yet age 18 on the hire date or, if later, on May 01 of the calendar year involved; **and**
- Has a duration of employment between May 01 and September 15; **and**
- Has not been employed by the same employer prior to the 90-day period between May 01 and September 15; **and**
- Has his/her principal place of abode within an Urban/Rural Empowerment Zone (EZ).

Supplemental Assistance Nutritional Program

This target group refers to any person who:

- Has attained the age of 18 but not yet 40 on the hire date; **and**
- Is a member of a family receiving assistance under SNAP for the six-month period ending on the hire date; **or**
- Is an able-bodied adult without dependents who ceases to be eligible for SNAP benefits but has received assistance for at least three months of the five-month period ending on the hire date.

Supplemental Security Income Recipient (SSI)

This target group refers to any person who is receiving SSI benefits for any month during the 60-day period ending on the hire date.

Long-Term Family Assistance Recipient

This target group refers to any person who is:

- A member of a family receiving Temporary Assistance for Needy Families (TANF) for at least 18 consecutive months ending on the hire date; **or**
- A member of a family receiving assistance for a total of at least 18 months (whether or not consecutive) beginning after August 05, 1997, and has a hire date which is not more than two years after the end of the earliest 18-month period; **or**
- A member of a family which ceased to be eligible for assistance by reason of any maximum payment limitation imposed by state or federal law and has a hire date which is not more than 2 years after the date of such cessation.

Long-Term Unemployment Recipient

This target group refers to any person who is unemployed for no less than 27 consecutive weeks **and** received unemployment compensation (which may be less than 27 weeks) for a period under state or federal law.

Applicants Not Eligible for WOTC Credits

This target group refers to any person who is:

- Any employee who has worked for the company in the past.
- No tax credit can be claimed for wages paid to relatives (including sons, daughters, stepchildren, spouses, fathers, mothers, brothers, sisters, step-brothers or sisters, nephews, nieces, uncles, aunts, cousins, or in-laws).
- No tax credit can be claimed for federally subsidized on-the-job training; however, wages paid after the subsidy expires can qualify for the credits.
- Non-United States citizens or non-permanent residents.
- Majority owners of the business.

4.1.4. Questionnaire

Based on the Target Group selection, questions will be loaded here. Questions marked with a red asterisk are mandatory and must be filled in order to complete the application. Clicking 'Next' will take you to the last section of the submission process.

Employer & Job Information Applicant Information Target Group Information Questionnaire Electronic Signature, Review & Complete

Applicant Characteristics for WOTC Target Group Classification

Short-Term Temporary Assistance for Needy Families (TANF) Recipient

Is the applicant a member of a family that received TANF assistance for any 9 months of the 18-month period that ended on their hire date? *

Yes No

Enter first name of primary recipient Enter last name of primary recipient

If other than Florida, select the state(s) where the applicant received benefits

Previous Next

Fig 4.1.4.1: Questionnaire Screen

4.1.5. Electronic Signature

Login ID and Signature Date fields will automatically load. Enter the password used to login to your account and click ‘Submit’. Clicking ‘Previous’ will allow making changes to the sections that were answered earlier.

Employer & Job Information Applicant Information Target Group Information Questionnaire Electronic Signature, Review & Complete

Electronic Signature

IRS Form 8850 Perjury Statement: Under penalties of perjury, I declare that the applicant provided the information on this form on or before the day a job was offered to the applicant and that the information I have furnished is, to the best of my knowledge, true, correct, and complete. Based on the information the job applicant furnished on page 1, I believe the individual is a member of a targeted group. I hereby request a certification that the individual is a member of a targeted group.

Login ID Password Signature Date

900000009 05/14/2019

Review & Submit

You can't modify or delete the application request once you have submitted, Please review carefully before submit.
If you are ready to submit your application, click the submit button or click the previous button to review your application details.

Previous Submit

After completing the application, you can submit another application by clicking ‘Submit New Application Request’ or download the printed PDF versions of 8850 and 9061 forms by clicking ‘Download Forms 8850 & 9061’ button.

The system will return a control number which can be used for further follow-ups and communication.

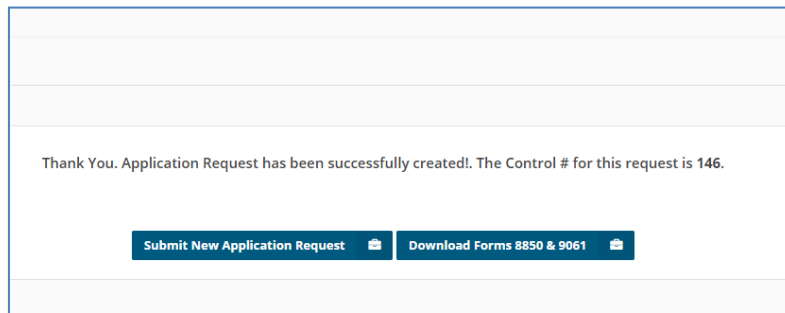


Fig 4.1.5.2: Confirmation Screen

4.2. Upload Batch File

If more than 1 application is supposed to be filed, this tab can be used. Update all information in a text file with a predefined format and upload them in the application. The predefined format can be found [here](#).

Files that were uploaded in text format will automatically convert as online applications. Each line item in the text document will become an individual application.

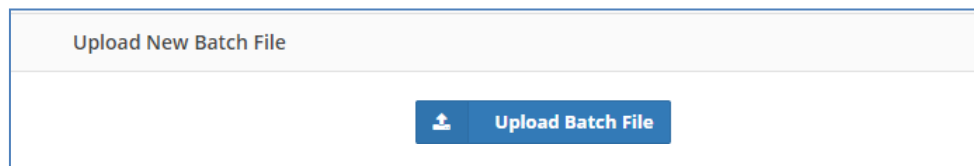


Fig 4.2.1: Upload Batch File Screen

Click on ‘**Upload Batch File**’ button to go to Batch File upload screen. Below instructions must be followed to successfully upload a file:

- File Size must be less than 5 MB.
- Only ‘TXT’ format files are accepted.

- Only one file can be uploaded at a time.
- Sample format of the file can be downloaded here.

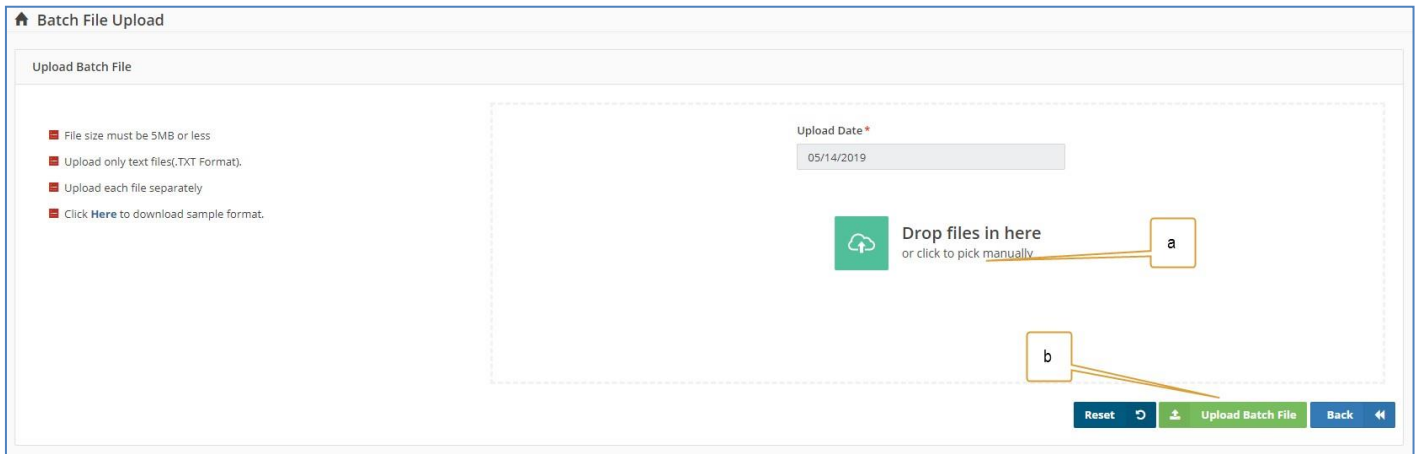


Fig 4.2.2: Batch File Upload Screen

- ‘Click to pick manually’ to load files from your machine.
- Click ‘Upload Batch File’ button to send the file to the WAM database.
- Click ‘Reset’ to delete the file and upload a new file. ‘Reset’ button will not upload the file into the database.
- Click the ‘Back’ button to abort the action.

4.2.1. Search Results screen

Files uploaded will process internally and display the status of each uploaded file in the below screen.

File Name, File Uploaded date, Uploader Name, number of accepted applications, number of rejected applications, and the status of each file application will be displayed.

‘View Error Log’ link will display the applications that are not accepted by WOTC system because of errors. You can fix those errors and upload them as a separate text file.

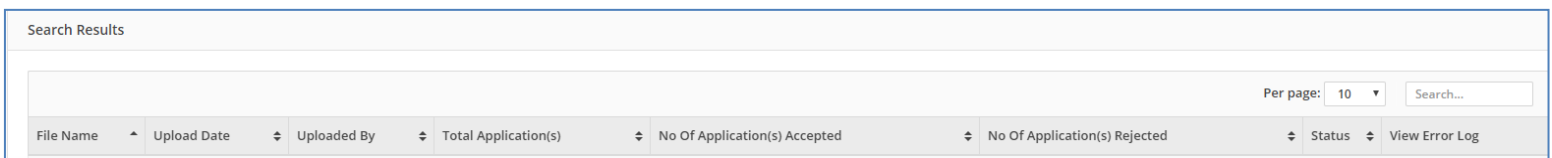


Fig 4.2.1.1: Batch File Results Screen

5. Manage Documents

Employer	Consultant
Permitted	Permitted

When processing an application, sometimes the employee or employer data must be verified. The information contained in these supporting documents can be uploaded and associated with an application. Some examples of supporting documentation:

- Driver’s License to validate age
- Social Security Card to validate Social Security Number

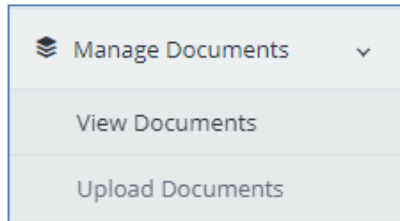


Fig 5.1: Manage Documents Screen

5.1. **View Documents**

Documents uploaded against an application can be searched based on FEIN, Control #, Applicant SSN, Document Category, Document Type or uploaded Date. Click the ‘Search’ button to load the results.

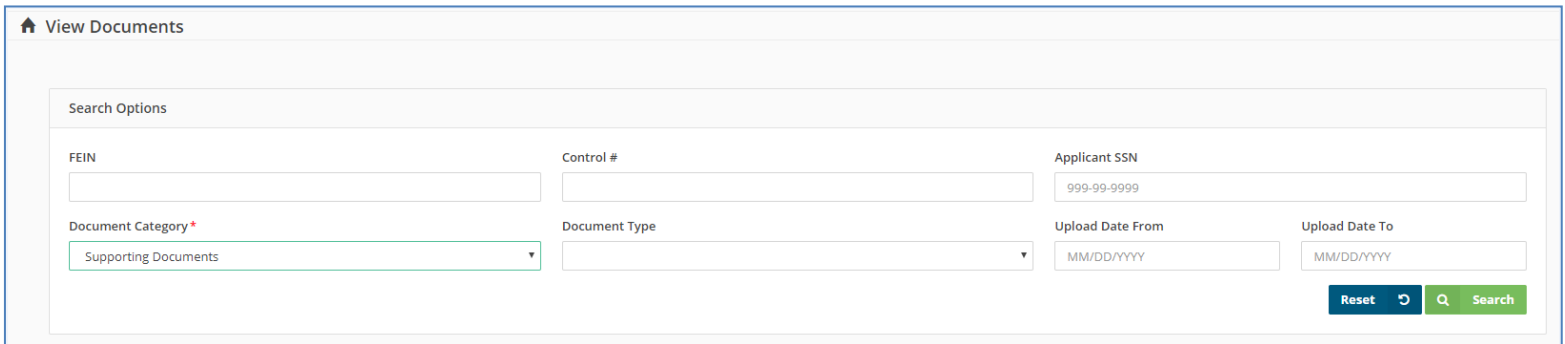


Fig 5.1.1: Search Documents Screen

Search Results

Total Document(s) : 0

Per page: 10 Search...



File Name	Document Category	Document Type	FEIN	Control#	Upload Date	Action
OTESTPOA.pdf	Connections	Employer Connection	135583779		05/10/2019	 

Fig 5.1.2: Document Results Screen

You can either view or download the document by clicking on icons under the Action column.

5.2. Upload Documents

Upload all supporting documents in this tab. Below instructions must be followed to upload a document.

- File size must be less than 2 MB.
- Password protected files are not accepted.
- Only PDF files can be uploaded.

Upload Documents

Upload Documents


Upload Instructions

- ★ File size must be 2MB or less
- ★ Files cannot be password protected
- ★ Upload only PDF files.

Control #*

Document Category*

Document Type*

 Drop files in here
or click to pick manually



Reset  Upload Document 

Fig 5.2.1: Document Upload Screen

6. Manage Connections

Connection Request must be active for a consultant to submit an application for an Employer.

Employer	Consultant
Permitted	Permitted

Consultant can add or edit a connection request.

The Employer can only disconnect a connection request for a consultant. Once a Connection request has been disconnected, the consultant cannot submit an application for the employer.

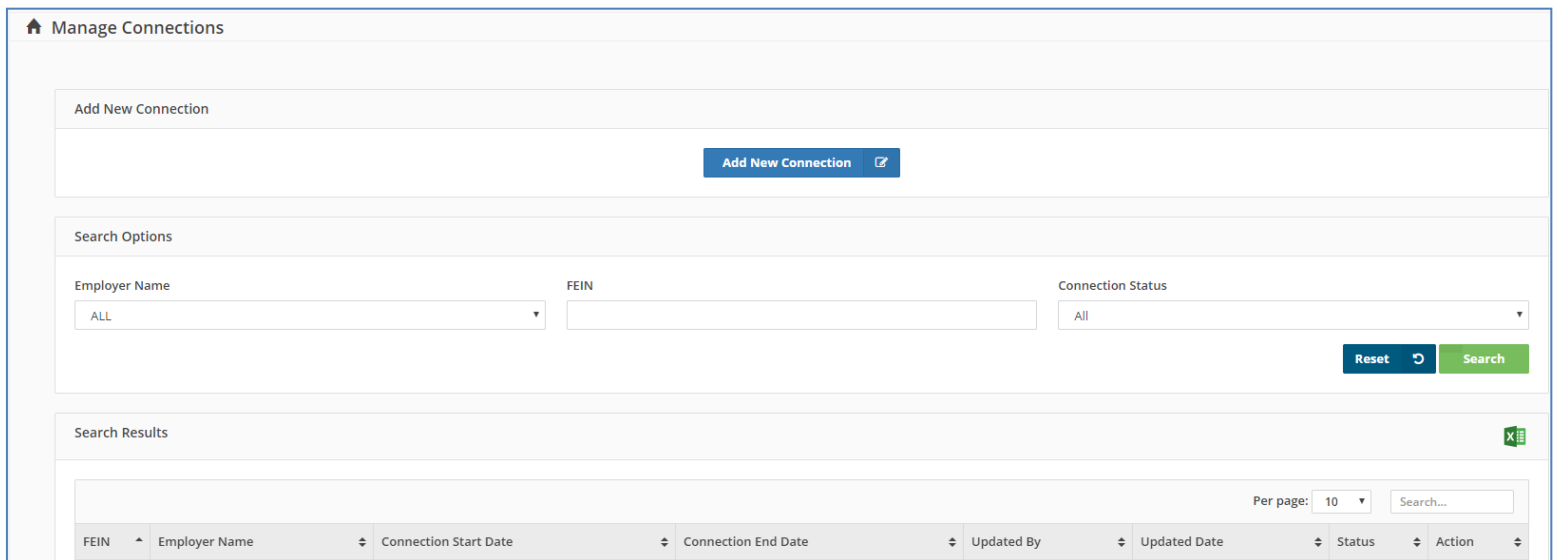


Fig 6.1: Add New Connection Screen

Click ‘Add New Connection’ screen to upload a connection request. Once a request is uploaded, it can be searched based on Employer Name, FEIN or connection Status.

Below are the connection status types:

- Active – Consultant can submit Application request.
- Disconnected – Employer or WAM have disconnected the Connection request.
- Expired – Connection Request has been expired. New Connection request must be uploaded soon.
- Pending – WAM staffs are reviewing the connection request uploaded.
- Rejected – WAM has rejected the connection request.

7. Manage Locations

Employer	Consultant
Permitted	Permitted

If an Employer has more than 1 location, fill in this information here before submitting an application request.

Employer Locations are searchable using Employer Name, FEIN and Location Name.

Manage Locations

Add New Location

Add New Location

Search Options

Employer Name* FEIN Location Name

135583779 - J.C. Penney Corporation, Inc.

Reset
Search

Search Results X

Per page: 10 Search...

FEIN	Location #	Location Name	Address	City, State, Zip Code	Created By	Status	Action
135583779	1	Location 1	107 E. Madison Street	Tallahassee, FL, 32399	Sydney Summers	Active	+

Showing 1 to 1 of 1 entries

Previous
1
Next

Fig 7.1: Manage Location Screen

Click ‘Add New Location’ button to add a new location for an employer. Below screen will appear.

Fig 7.1.1: Add Location Screen

ADD LOCATION

Employer Name	Choose Employer Name from this dropdown.
Employer Location	Choose Employer Location from this dropdown.
Location FEIN	Enter the FEIN for this new entry.
Location Name	Most of this information will be filled automatically.
Address Line 1	Address 1 for the new entry.
Address Line 2	Additional Address for the new entry.
City	The city of the employer.

State

State where the employer is located.

Zip Code

Zip Code of the employer.

8. Manage Representative

Employer	Consultant
Not Permitted	Permitted

Consultants can add Representatives for an employer using this tab.

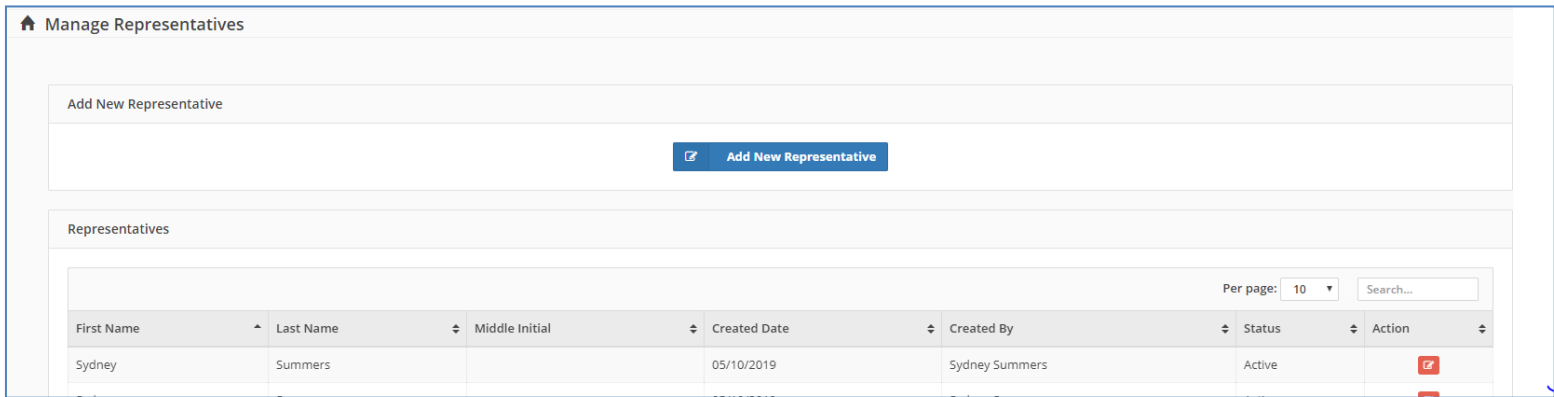


Fig 8.1: Manage Representative Screen

Representatives added can be edited by clicking on the “Edit” icon under Action column.

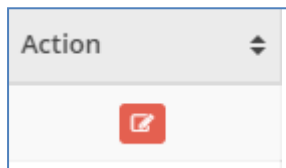


Fig 8.2: Edit Screen

Click on ‘Add New Representative’ button to add any new representatives for an employer.

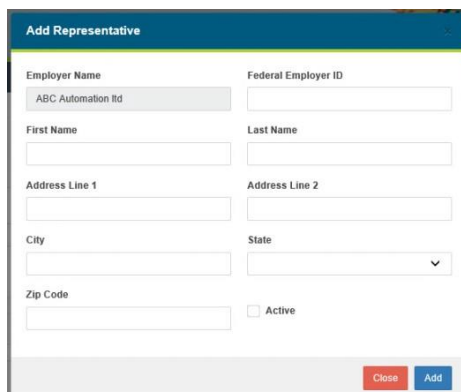


Fig 8.3: Add Representative Screen

9. View Resources

Supporting documents, Manuals, Instruction documents uploaded by WAM can be viewed here. Select 'Resource Name' from the dropdown and click 'Search Resource' button to view the files.

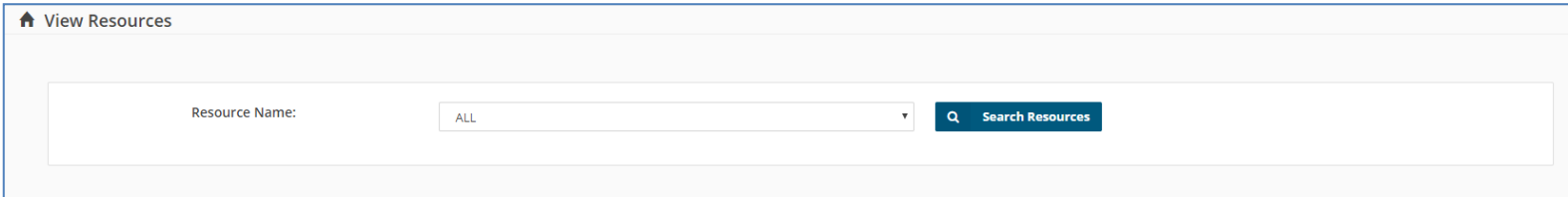
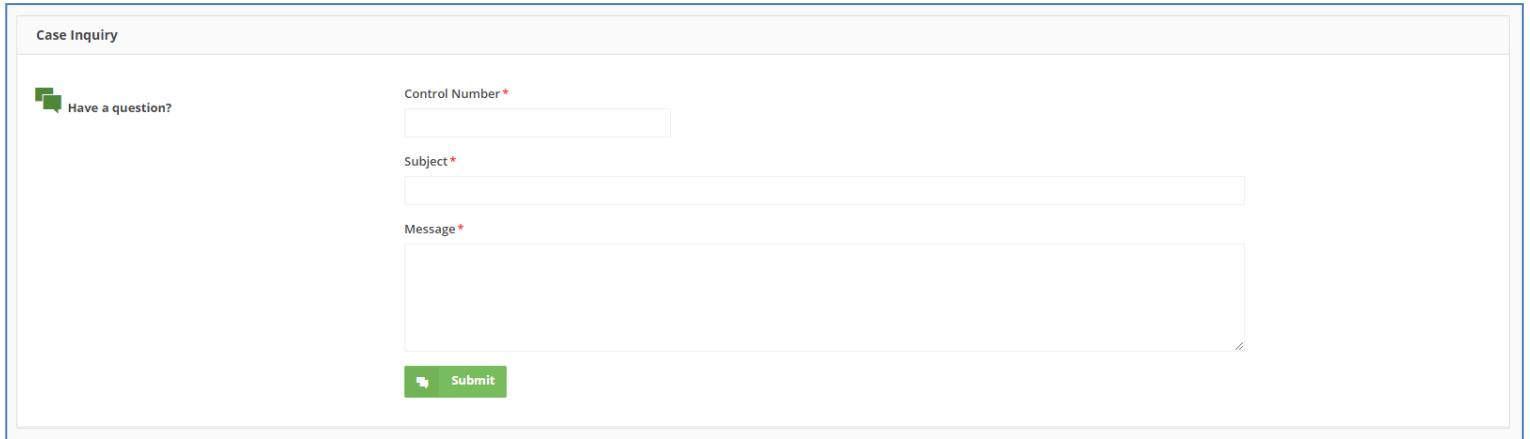


Fig 9.1: View Resources Screen

10. Contact Us

This tab helps to create a ticket against an application submitted earlier. Control number is mandatory to file a ticket.

Click the 'Submit' button to file or create a ticket.



The screenshot shows a web form titled "Case Inquiry". On the left side, there is a green icon of two speech bubbles and the text "Have a question?". The main form area contains three input fields: "Control Number*" (a short text box), "Subject*" (a long text box), and "Message*" (a large text area). Below these fields is a green button with a white speech bubble icon and the text "Submit".

Fig 10.1: View Resources Screen

11. Account Profile

Click 'Update Security Question' button to change your security questions. Click 'Submit' to save those new changes in the database.

Click 'Update Password' button to change your password.

12. Glossary

8850	Pre-Screening Notice and Certification Request for the Work Opportunity Credit Form. This IRS form is the primary form used when submitting a WOTC Application.
9061	The Individual Characteristics Form. This ETA form must be submitted with IRS Form 8850 when submitting a WOTC Application. It is used to determine the employee's eligibility as a member of one of the Target Groups.
Application	A request to certify an employee as a member of a Target Group and eligible for the WOTC.
Batch Upload File	A CSV file containing multiple Applications. It is uploaded through the WOTC Web service by an External User and gets inserted into the BATCH_UPLOADS table for processing by the Batch Upload Process.
Batch Upload Process	A Batch Upload File contains multiple Applications and the Batch Upload Process validates each Application to ensure it provides the required data and conforms to the required format of the WOTC_APP table.
Certification Request	See 'Application'.
Certified	The Status is given to an Application that complies with all the requirements of the WOTC.
Consultant	A third party who has been granted Power of Attorney by an Employer to submit WOTC Applications and to represent the Employer in the Application process.
CSV	Comma Separated Values.
Denied	The Status given to an Application that has failed to comply with the requirements of the WOTC. An Application that has been Denied can be appealed, so it is possible for a Denied Application to turn into a Certified Application at a later time.
Employee	An entity with an SSN who is claimed by an Employer on an Application as a member of a Target Group that would entitle the Employer to receive the WOTC. Information about the Employee is entered into the WOTC database as part of each Application.
Employer	An entity with a FEIN who has submitted an Application. Based on the information in the Application, the Employer has been entered into the WOTC database.

FEIN	Federal Employer Identification Number. It has a couple of synonyms, Employer Identification Number (EIN), Tax Identification Number (TIN) and Federal Tax Identification Number. It is a unique 9-digit number assigned by the IRS and is used to identify a business entity.
Forms Owner	This is the entity responsible for storing and maintaining the original copies of forms 8850 and 9061 as well as any supporting documentation. If the Application was submitted by an Employer or Consultant using the WOTC Web service then the Employer or Consultant is the Forms Owner. If the Application, along with the forms, was mailed to the WOTC business office then the WOTC business office is the Forms Owner.
Selected Target Group	This is a Target Group that has been applied for and chosen for evaluation from the set of <u>Eligible</u> Target Groups. WAM requires at least one <u>Selected</u> Target Group. See also, 'Approved Target Group,' 'Eligible Target Group' and 'Target Group.'
Single Submission Form	A WOTC Web service form used by Employers and Consultants to submit IRS Form 8850 and ETA Form 9061 data. It is found after logging in at https://wotc.floridajobs.org .
SNAP	Supplemental Nutrition Assistance Program, the new federal program name for Food Stamps.
Supporting Documentation	Documentation required by an Application to support the claims made on the Application. Examples of such documentation include a Driver's License and a Social Security card.
System	The WOTC 'system' is the combined interactions of four applications: WOTC Desktop, WOTC Web, Batch Upload Process, and the Auto Determination Process.
TANF	Temporary Assistance for Needy Families.
Target Group	A demographic group defined by the ETA as eligible for participation in the WOTC program. These have changed over the life of the WOTC program. Some are no longer valid for new Applications, but current Target Groups may not be valid for Applications submitted for prior years. See also, 'Approved Target Group,' 'Eligible Target Group' and 'Selected Target Group.'
User	WOTC business unit staff.
WOTC	Work Opportunity Tax Credit.