



# T4WOTC™ — a website for WOTC



**Screening User Guide for  
Company Admin Users**

The purpose of this document is to give company representatives a better understanding of how to navigate through the screening area of Deloitte Tax's ("Deloitte") T4WOTC™ website. The information in this document is subject to change. The latest version of the document is available via the Help section of our T4WOTC™ website. Contact your Deloitte Tax engagement team for further assistance.

## Screening link

A secure weblink based on information submitted by your company's IT department will be developed and forwarded to you for your applicants to access. Depending on the agreement between your company and Deloitte, the link may be able to be forwarded via email to your new applicants. Any "pop-up" blockers must be disabled as the system will open up information in a separate window. The site is designed for use with Microsoft Internet Explorer 8.0 and above, Firefox, Chrome and Safari browsers.

## Language choice

Screening is available in both English and Spanish. For other languages, please contact the Deloitte Tax ("Deloitte") Credits & Incentives ("C&I") Center of Excellence at 1-888-9-T4WOTC (1-888-984-9682)

## Welcome to WOTC

Created in 1996, WOTC (Work Opportunity Tax Credit) is a government program designed to stimulate employment by providing tax credits to employees who meet specific criteria. Your company is participating in the WOTC program and screens applicants and new employees on or before an offer is made to determine eligibility for the program. It is important to note that answering the WOTC questions is confidential and will not affect the employee's job, wages or taxes.

## Login

The applicant / new employee ("employee") enters First Name, Last Name, SSN and answers a question if he or she has previously worked for the company. The applicant is also asked if he or she is under the age of 40 as some categories are partially based on age. The answer will help determine the questions that will be posed to the applicant. Rehires are ineligible for WOTC.

## Questionnaire

The next few screens are geared toward determining eligibility for WOTC and take just a couple of minutes to navigate. Most questions are "Yes" or "No" in nature. Questions will be eliminated or added based on the answer selected to expedite the process. If the individual is not sure of an answer due to not knowing a specific issue, the answer "Yes" should be selected.

## Questionnaire - Applicant information (If applicable)

If an applicant is potentially eligible, he or she will be prompted for additional information. Data from these fields flows to additional forms. Here is a list and brief description of each field. The "\*" denotes a mandatory field:

- First Name – Employee's first name – flows over from earlier page
- Last Name: Employee's last name– flows over from earlier page
- \*Phone Number: Employee's best contact number
- SSN: Employee's Social Security Number – flows over from earlier page

- \*Street Address 1: Employee's Street Address. Note, must have appropriate suffix such as St., Dr., Rd, etc. The address cannot be a PO Box. If the employee encounters continuous issues completing this field, call 1-888-9-T4WOTC (904-9682)
- Street Address 2: Apartment number or additional designation if needed.
- \*City: City where employee resides
- State: Choose state where employee resides from drop down
- County: County where employee lives
- \*ZIP: Employee's ZIP Code
- \* Birth Date in Mon/DD/YYYY format (if applicable)
- \* Job Title: Does not need to be exact. Complete with closest job title to new position
- \* Approx. Starting Wage: Does not need to be exact. Discreetly enter the appropriate rate of pay (rate per hour or yearly salary) into T4WOTC™.
- \* Approx. Start Date: Approximate date applicant begins employment. Can be corrected later by HR team via New Hire file upload.

## Confirmation Page

On this page the employee has the opportunity to review the answers prior to submitting. A "change answer" link is provided if an answer needs to be changed. Once the page has been reviewed, the employee may either select "Previous" to select another answer or "Submit" to proceed to the next step.

If the employee has selected one or more affirmative answers to the questionnaire, he or she has been screened "potentially eligible" for a WOTC credit. (Note that not everyone that is designated as "potentially eligible" will receive a WOTC credit as the ultimate decision is made by the relevant State Workforce Agency (SWA).

Verbiage from the Form 8850 will be displayed for the employee to review notifying the employee that he or she may be part of a WOTC eligible group. The employee will enter his or her name EXACTLY as shown at the top of the screen to electronically sign the questionnaire. This electronic signature will be affixed to the Form 8850 which will be accessible by the HR team via the Admin application.

The employee will select "Submit" and receive a note thanking him/her for completing the questionnaire. In some cases, the employee will be requested to submit additional documentation (such as a driver's license) to substantiate that he or she is a member of the WOTC eligible group. If the employee receives this note, please have the employee complete and fax (or send) the documentation to Deloitte as soon as possible.

Deloitte's address is:

- Deloitte C&I Center of Excellence
- Attn: WOTC
- 2200 Ross Ave. Suite 11600
- Dallas, TX 75201-6778

Deloitte representatives can be reached from 7am to 7pm CT at 1-888-9-T4WOTC (1-888-984-9682).

The process will conclude by advising the applicant that he or she has completed the questionnaire and if potentially eligible, will have the ability to print a copy of the 8850 or 9061 forms for his or her records. These are the forms that Deloitte will submit to the state workforce agency on the company's behalf.

This document is highly confidential and proprietary information of Deloitte & Touche Tax Technologies LLC. Unauthorized copying, distribution, or dissemination of the information contained herein is a violation of the company's policies and proprietary rights.

As used in this document, "Deloitte" means Deloitte & Touche LLP, a subsidiary of Deloitte LLP. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

© 2014 Deloitte & Touche Tax Technologies LLC

All rights reserved.

Printed in the United States of America.

The contents of this publication may not be reproduced in any form, by any means, in part or in whole, without the prior written permission of Deloitte & Touche Tax Technologies LLC, 111 S. Wacker Chicago, IL 60606.

Other product and company names mentioned herein may be the trademarks of their respective owners.

895913-011614