Welcome to Florida!
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<td>10</td>
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<td></td>
<td>Page 3</td>
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<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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**

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Author</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/20/2019</td>
<td>Draft 1</td>
<td>Naren Willingiri</td>
<td>An outline of the document with section descriptions, completed meta-data and system overview</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SGS Technologie</td>
<td></td>
</tr>
</tbody>
</table>

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:

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:

<table>
<thead>
<tr>
<th></th>
<th>Employer</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permitted</td>
<td></td>
<td>Permitted</td>
</tr>
</tbody>
</table>

2. Click on ‘Create an Account’
3. Choose your User Role and select ‘Click to Register’ button
4. Fill in the information requested in Employer / Consultant Registration Screens.

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

Fig 1.4.3.1: User Roles

Fig 1.4.3.2: Consultant Registration Screen

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

![Consultant / Employer Information Screen](image)

Fig 1.4.3.4: Consultant / Employer Information Screen

<table>
<thead>
<tr>
<th>FEIN</th>
<th>Federal Employer Identification Number.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>Type the Entity Name.</td>
</tr>
<tr>
<td>Contact First Name</td>
<td>Contact Person’s First Name.</td>
</tr>
<tr>
<td>Contact Middle Initial</td>
<td>Type the first letter of the Contact Person’s middle initial.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address line 1</td>
<td>The address of the Employer / Consultant.</td>
</tr>
<tr>
<td>Address line 2</td>
<td>Additional Employer / Consultant address information.</td>
</tr>
<tr>
<td>City</td>
<td>The city of the Employer / Consultant.</td>
</tr>
<tr>
<td>State</td>
<td>Select your State from the dropdown.</td>
</tr>
<tr>
<td>ZIP Code</td>
<td>The zip code of an Employer / Consultant.</td>
</tr>
</tbody>
</table>

### Secondary Address

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same as Primary User</td>
<td>If no secondary Address information is present, click on this button.</td>
</tr>
</tbody>
</table>
7. Fill this form to setup profile information of an Employer / Consultant.

**Fig 1.4.3.6: Profile Information Screen**

**Primary User Information:**

<table>
<thead>
<tr>
<th>Primary Username</th>
<th>Choose a Username to log in to your account.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address of User</td>
<td>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.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Enter your Contact Information.</td>
</tr>
</tbody>
</table>

**Security Questions:**

| 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. |

<table>
<thead>
<tr>
<th>Security Questions 1</th>
<th>Answer 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security Questions 2</td>
<td>Answer 2</td>
</tr>
<tr>
<td>Security Questions 3</td>
<td>Answer 3</td>
</tr>
</tbody>
</table>
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.

**Fig 1.4.3.7: Security Agreement Screen**

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

```
Hi BF,

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 in order to recover your account.

Fig 1.4.4.1: Login Screen
2. Dashboard

<table>
<thead>
<tr>
<th>Employer</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permitted</td>
<td>Permitted</td>
</tr>
</tbody>
</table>

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.

![Month in Review Screen](image)
2.2. Application Overview

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

![Application Overview Screen]

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.

![Potential Tax Savings Overview Screen]

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

![My Alerts Screen](image_url)

*Fig 2.4.1: My Alerts Screen*
3. **Manage Applications**

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

<table>
<thead>
<tr>
<th>Employer</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permitted</td>
<td>Permitted</td>
</tr>
</tbody>
</table>

![Fig 3.1: Manage Applications Screen](image)

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.

![Fig 3.1.1.1: Search Application Screen](image)

![Fig 3.1.2: Search Results Screen](image)
3.2. **View/Download Letters**

You can download 8850/9061 letters in 2 ways.

![Fig 3.2.1: View Download Letters Screen](image)

- 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](image)

- 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 pended.
4. **Submit Applications**

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

<table>
<thead>
<tr>
<th>Employer</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permitted</td>
<td>Permitted</td>
</tr>
</tbody>
</table>

![Fig 4.1: Submit Application Screen](image)

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](image)
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.

![Fig 4.1.1.1: Submit Online – Employer & Job Information Screen](image-url)
### EMPLOYER INFORMATION

<table>
<thead>
<tr>
<th>Employer Name</th>
<th>Choose Employer Name from this dropdown.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Location</td>
<td>Choose Employer Location from this dropdown.</td>
</tr>
</tbody>
</table>

### EMPLOYER INFORMATION & CONTACT INFORMATION

<table>
<thead>
<tr>
<th>Employer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer FEIN</td>
</tr>
<tr>
<td>Contact First Name</td>
</tr>
<tr>
<td>Contact Last Name</td>
</tr>
<tr>
<td>Location Name</td>
</tr>
<tr>
<td>Phone Number</td>
</tr>
<tr>
<td>Address Line 1</td>
</tr>
<tr>
<td>Address Line 2</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>State</td>
</tr>
<tr>
<td>Zip Code</td>
</tr>
</tbody>
</table>
APPLICANT JOB INFORMATION

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

4.1.2. Applicant Information:

APPLICANT INFORMATION

<table>
<thead>
<tr>
<th>Employee First Name</th>
<th>First name of the employee.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Last Name</td>
<td>Last name of the employee.</td>
</tr>
<tr>
<td>Enter Applicant’s Date of Birth</td>
<td>Date of birth of the employee.</td>
</tr>
<tr>
<td>Social Security Number</td>
<td>The Social Security Number of the employee.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Phone Number of the Employee.</td>
</tr>
</tbody>
</table>
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.
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.
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.
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](image)

### 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](image)

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.

<table>
<thead>
<tr>
<th>Batch File Upload</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload Batch File</td>
</tr>
</tbody>
</table>

- '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.

<table>
<thead>
<tr>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Name</td>
</tr>
</tbody>
</table>

Fig 4.2.1: Batch File Results Screen
5. **Manage Documents**

<table>
<thead>
<tr>
<th>Employer</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permitted</td>
<td>Permitted</td>
</tr>
</tbody>
</table>

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

![Manage Documents Screen](image)

*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.

![Search Documents Screen](image)

*Fig 5.1.1: Search Documents Screen*
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.

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.

<table>
<thead>
<tr>
<th>Employer</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permitted</td>
<td>Permitted</td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Employer</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permitted</td>
<td>Permitted</td>
</tr>
</tbody>
</table>

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 Location Screen](image)

*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**

<table>
<thead>
<tr>
<th>Add Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Name</td>
</tr>
<tr>
<td>Location Name</td>
</tr>
<tr>
<td>Address Line 1 *</td>
</tr>
<tr>
<td>State *</td>
</tr>
<tr>
<td>Active</td>
</tr>
</tbody>
</table>

**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.
<table>
<thead>
<tr>
<th>State</th>
<th>State where the employer is located.</th>
</tr>
</thead>
</table>
8. **Manage Representative**

<table>
<thead>
<tr>
<th>Employer</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Permitted</td>
<td>Permitted</td>
</tr>
</tbody>
</table>

Consultants can add Representatives for an employer using this tab.

![Manage Representatives](image1)

**Fig 8.1: Manage Representative Screen**

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

![Action](image2)

**Fig 8.2: Edit Screen**

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

![Add Representative](image3)

**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](image-url)
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.

![Fig 10.1: View Resources Screen](image-url)
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_UPLOADES 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.
<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FEIN</td>
<td>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.</td>
</tr>
<tr>
<td>Forms Owner</td>
<td>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.</td>
</tr>
<tr>
<td>Selected Target Group</td>
<td>This is a Target Group that has been applied for and chosen for evaluation from the set of Eligible Target Groups. WAM requires at least one Selected Target Group. See also, ‘Approved Target Group,’ ‘Eligible Target Group’ and ‘Target Group.’</td>
</tr>
<tr>
<td>Single Submission Form</td>
<td>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 <a href="https://www.floridajobs.org/WOTCApp/submit_application.asp">https://www.floridajobs.org/WOTCApp/submit_application.asp</a>.</td>
</tr>
<tr>
<td>SNAP</td>
<td>Supplemental Nutrition Assistance Program, the new federal program name for Food Stamps.</td>
</tr>
<tr>
<td>Supporting Documentation</td>
<td>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.</td>
</tr>
<tr>
<td>System</td>
<td>The WOTC ‘system’ is the combined interactions of four applications: WOTC Desktop, WOTC Web, Batch Upload Process, and the Auto Determination Process.</td>
</tr>
<tr>
<td>TANF</td>
<td>Temporary Assistance for Needy Families.</td>
</tr>
<tr>
<td>Target Group</td>
<td>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.’</td>
</tr>
<tr>
<td>User</td>
<td>WOTC business unit staff.</td>
</tr>
<tr>
<td>WOTC</td>
<td>Work Opportunity Tax Credit.</td>
</tr>
</tbody>
</table>