

CONNECT 2018

WOTC 101: PRESENTED BY ADP

INTRODUCTIONS



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Services: Western US



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AGENDA

- What is WOTC
- How Does WOTC Work
- WOTC Simplified
 - Screening Process
 - Supporting Documentation
- Gaining Incremental Credits
- Wrap Up

OBJECTIVES



Driving your Work
Opportunity Tax Credit
Opportunity through Avionté
and ADP

ADP Tax Credit Services



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Why ADP is the right choice?

- Personally, with ADP 11 years, and work exclusively with Staffing Companies. Specific Staffing WOTC Division at ADP!
- More than 200 Avionte Clients currently using the ADP WOTC Integration!
- Nearly 50% of all WOTC credits in the USA are produced by ADP = \$1.4 billion in 2017
- ADP Payroll is NOT Necessary to take advantage of WOTC!
- Over \$10 million invested in technology, processes and personnel annually
- Over 400 dedicated ADP associates to the Tax Credits practice



What is WOTC?

The Work Opportunity Tax Credit (WOTC) is a Federal tax credit available to employers who hire and retain veterans and individuals from other target groups.

Work Opportunity Tax Credit (WOTC)

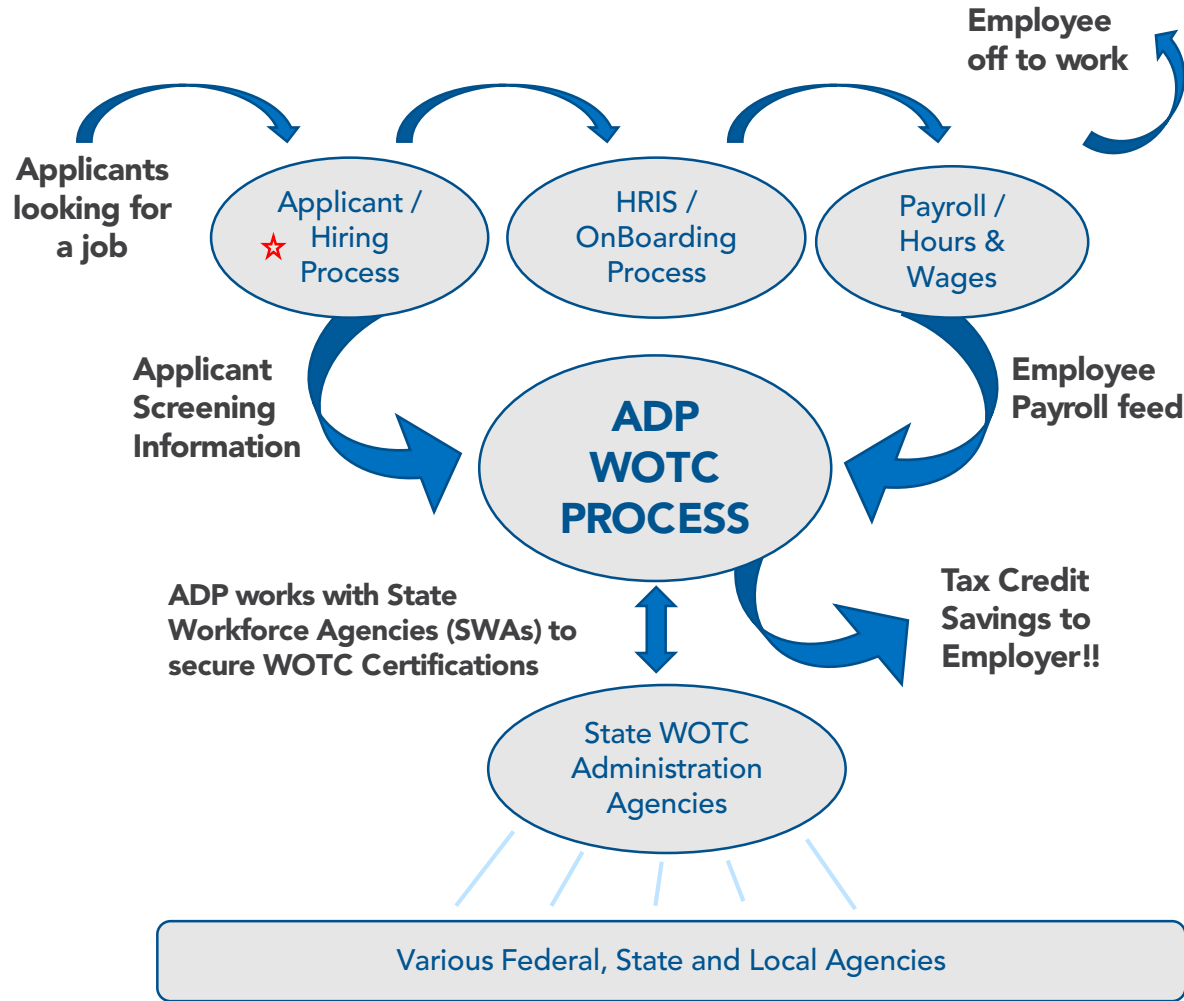
- 10 categories for employees to qualify
- Credit of \$2,400 up to \$9600 per eligible new hire depending on category of qualification.
- Employee must work 120 hours in 52 weeks



The Intent of WOTC is to Help:

- Move from economic dependency into self-sufficiency
- Become contributing taxpayers.
- Employers reduce their income tax liability.

How does WOTC work?



Key Elements of the Program

- Screening must be completed on or before the job offer date
- 28 days from job starting date to get the paperwork into the SWAs
- You can qualify for more than one criteria
- Credits are a % of wages paid based on hours worked
- Benefit to employer \$2,400 to \$9,600 per ee
- Benefit to tax payers estimated at \$17k per ee or \$14.4 billion / yr.

WOTC Screening Options



Web-In/ Integration*

- Eliminate all WOTC paperwork
- Integrates with
- Kiosk, iPhone, Android, Tablet
- Administrative Burden is **ELIMINATED!**



Phone-In/ IVR*

- Eliminate WOTC paperwork
- Increases eligibility
- 177 languages are supported

**Electronic signatures are accepted*

Welcome

WOTC

Finish

WOTC

Before continuing, complete the Work Opportunity Tax Credit screening launched in a separate browser page. If the page failed to launch, click the 'Launch survey' button.

[Launch survey](#)

[Next](#)

17%

Welcome



Personal Information



Age Verification



Address



Previous Employment



Conditional Certification



Military Service

Military Service

Not sure? If you are not sure if this applies to you, choose "Yes", and we will verify that information for you.

* Have you served in the U.S military?

YES

NO



Notes:

- Must have at least 180 days of active service
- Coast Guard, National Guard and Reserves will qualify for credit
- ROTC does not qualify for credit

Continue

40%

Welcome



Personal Information



Age Verification



Address



Previous Employment



Conditional Certification



Military Service



Temporary Assistance



Felony



Long Term Unemployed

Not sure? If you are not sure if this applies to you, choose "Yes", and we will verify that information for you.

* Have you been continuously unemployed for the last 27 weeks (since at least 12/26/2017)?

YES

NO

Continue

Welcome

WOTC

Finish

Acknowledgment

Certification of Information:

I am applying for employment with **ASAP Business Solutions L.L.C.**, and upon my agreement below, I certify that the information I have provided in the application process is accurate, truthful, and complete to the best of my knowledge. I understand and agree that any false, incomplete, or misrepresented information discovered before or after a job offer will result in rejection of my application or dismissal at any time during my employment.

I agree

I do not agree

[Back](#)

[Submit application](#)

Supporting Documentation

ADP Takes Care of More than **97%** of Supporting Documentation for Eligible Employees



Long-Term **Family Assistance** Recipient (TANF)



Veteran Target Groups



Supplemental **Security** Income Recipient



Qualified **Ex-Felon**



New: E-signature during screening



Short-Term **Family Assistance** Recipient (TANF)



Vocational **Rehabilitation** Referral



New: E-signature during screening



Food Stamp Recipient (SNAP)



Designated **Community** Resident

Driver's License/W4 Needed for Zone Categories



Summer Youth Employee (in empowerment zone)

Driver's License/W-4 Needed for Zone Categories



Long-Term **Unemployed**



New: E-signature during screening

*RFV-Request for Verification
(Pre-filled ADP form needed for EE signature)*



Tax Credit status is displayed in the Employee Record within Avionté, and can be pulled into reports to strategically place eligible candidates.

Advanced Search

Search Setup Search Result SQLText

Print
 Preview Before Printing Fit width to pages 1
 Export To Excel Print Search Result

Action
 Action

Search Result

Drag a column header here to group by that column.

| Select | EmployeeID | Name | LastName | FirstName | SSN | Status | OnAssignment | Tax Credit Qualified | City |
|--------------------------|------------|-------------------|-----------|------------|-------------|--------|-------------------------------------|-------------------------------------|--------------|
| <input type="checkbox"/> | 20381 | Little, Leo | Little | Leo | xxx-xx-6876 | Active | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Minneapolis |
| <input type="checkbox"/> | 20451 | Affleck, Ben | Affleck | Ben | xxx-xx-76e+ | Active | <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | 20321 | Alabama, Albert | Alabama | Albert | xxx-xx-4738 | Active | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Mobile |
| <input type="checkbox"/> | 20324 | Alaska, Antonio | Alaska | Antonio | xxx-xx-2340 | Active | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Juneau |
| <input type="checkbox"/> | 20480 | Alcott, Louisa Ma | Alcott | Louisa May | xxx-xx-13e+ | Active | <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | 20555 | Alfaro, Leota | Alfaro | Leota | xxx-xx-99e+ | Active | <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | 20457 | Alighieri, Dante | Alighieri | Dante | xxx-xx-65e+ | Active | <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | 20382 | Anoka, Annie | Anoka | Annie | xxx-xx-6987 | Active | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Eden Prairie |
| <input type="checkbox"/> | 20323 | Arizona, Andrea | Arizona | Andrea | xxx-xx-3938 | Active | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Phoenix |
| <input type="checkbox"/> | 20322 | Arkansas, Arlene | Arkansas | Arlene | xxx-xx-0943 | Active | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Little Rock |
| <input type="checkbox"/> | 20559 | Arthur, Mayhelle | Arthur | Mayhelle | xxx-xx-34e+ | Active | <input type="checkbox"/> | <input type="checkbox"/> | |

Grand Summaries
 Count = 214

| Group Name | Result Count |
|------------|--------------|
| 1 | 214 |

| Table | Field | Value |
|--------|-----------------|--------|
| Detail | Employee Status | Active |

AVIONTÉ Talent Order Company Contact Posting Admin

Martin Smith
 22945 Online Applicant

Phone not defined
 Email
 Resume

Click to enter notes or something interesting about this talent...

Back

Profile
 Personal Professional Confidential

General information
 First name Martin
 Middle name
 Last name Smith
 Branch Madison
 Talent module theme Avionté Theme
Tax credit status Pre-Qualified
 Send form request

Contact information
 Email msmith@example.com

Addresses
 No addresses have been added to this individual.

Application process
 Original workflow testing
 Completed 07/13/2018
 Workflow steps Welcome WOTC Finish

Acknowledgments
 07/13/2018 Agreed ABC Staffing Inc.

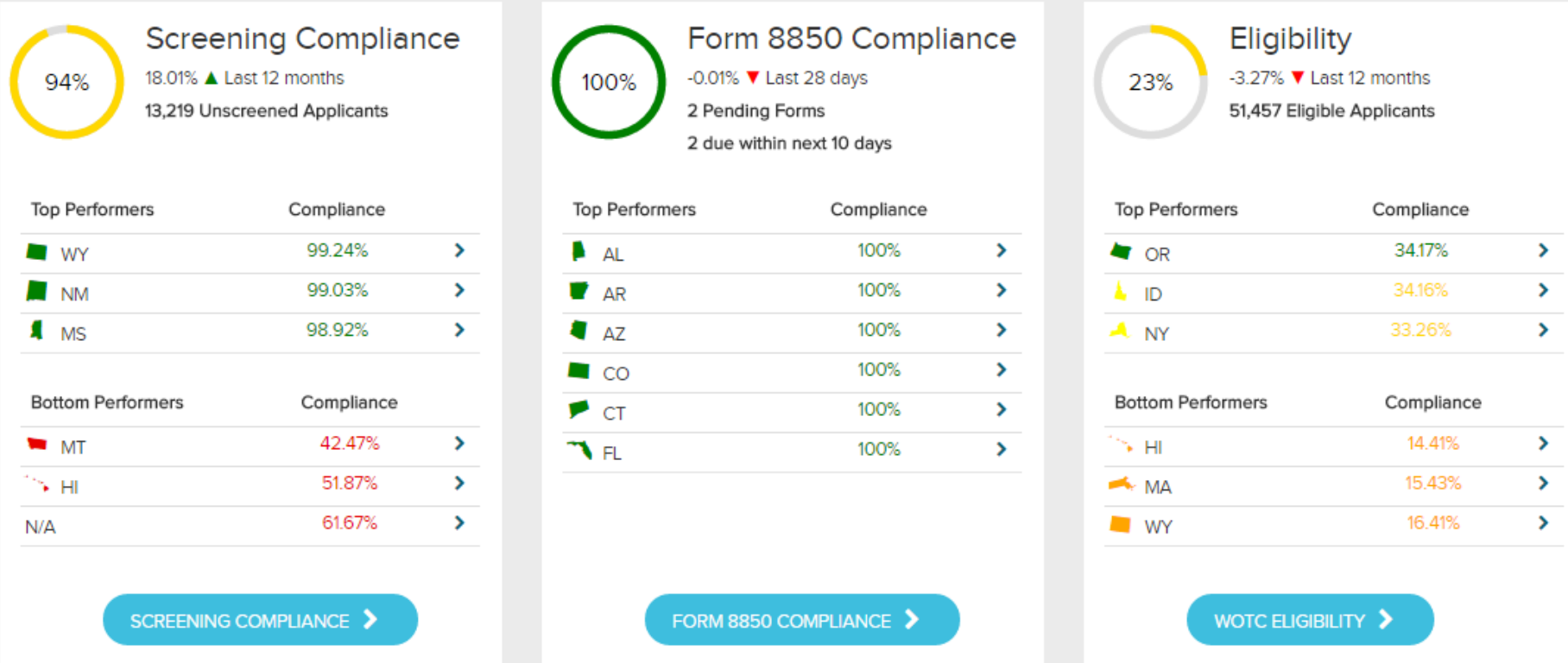
Job and salary expectations
 Current salary \$0
 Min salary expected \$0
 Job titles

Documents
 No documents have been added to this individual.

Order History
 This individual has no past order history to display.

Reporting

WOTC



Dashboards make it quick and easy to view WOTC screening, forms, and eligibility data.

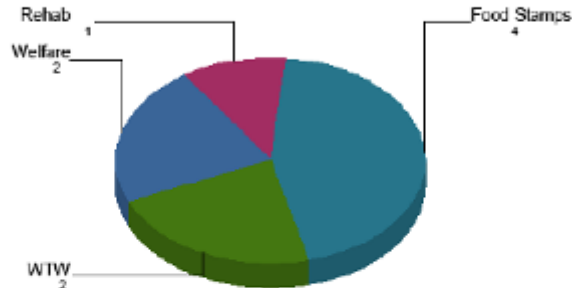
Reporting

Sample Company - WOTC Screening Activity
Individuals screened are those through 06/30/2010

| Location | Name | Hire Date | Screened | Eligible | Details |
|----------------------------|------|------------|----------|----------|--|
| 0010 | | | | | |
| Florence, SC | | | | | |
| Sample Company | | | | | Screened Eligible Hires from 01/01/2008 through 06/30/2010 |
| Brown, Bill | | 05/29/2008 | 0/0 | | |
| Brown, Lisa | | 07/16/2008 | 0/0 | | |
| Brown, David | | 05/16/2008 | 0/0 | | |
| Brown, John | | 05/06/2008 | 0/0 | | |
| Brown, Joseph | | 07/06/2008 | 0/0 | | |
| Brown, Mark | | 07/26/2008 | 0/0 | | |
| Brown, Michael | | 05/16/2008 | 0/0 | | |
| Brown, Robert | | 05/08/2008 | 0/0 | | |
| Smith, Bill | | 05/11/2008 | 0/0 | | |
| Smith, Dan | | 07/11/2008 | 0/0 | | |
| Smith, David | | 05/11/2008 | 0/0 | | |
| Smith, John | | 05/11/2008 | 0/0 | | |
| Smith, Joseph | | 07/01/2008 | 0/0 | | |
| Smith, Mark | | 07/01/2008 | 0/0 | | |
| Smith, Michael | | 05/13/2008 | 0/0 | | |
| Smith, Robert | | 05/23/2008 | 0/0 | | |
| Smith, Susan | | 07/03/2008 | 0/0 | | |
| Screened this location: 17 | | | | | |
| Eligible this location: 3 | | | | | |
| Eligible %: 17.65% | | | | | |
| 0020 | | | | | |
| Florence, SC | | | | | |
| Jones, Bill | | 05/22/2008 | 0/0 | | |
| Jones, Dar | | 07/12/2008 | 0/0 | | |
| Jones, David | | 05/12/2008 | 0/0 | | |
| Jones, John | | 05/03/2008 | 0/0 | | |
| Jones, Joseph | | 07/02/2008 | 0/0 | | |
| Jones, Mark | | 07/23/2008 | 0/0 | | |
| Jones, Michael | | 05/14/2008 | 0/0 | | |
| Jones, Robert | | 05/04/2008 | 0/0 | | |
| Jones, Susan | | 07/04/2008 | 0/0 | | |
| Lee, Bill | | 05/27/2008 | 0/0 | | |
| Lee, Dan | | 07/11/2008 | 0/0 | | |
| Lee, David | | 05/17/2008 | 0/0 | | |
| Lee, John | | 05/07/2008 | 0/0 | | |
| Lee, Joseph | | 07/07/2008 | 0/0 | | |
| Lee, Mark | | 07/07/2008 | 0/0 | | |
| Lee, Michael | | 05/19/2008 | 0/0 | | |
| Lee, Robert | | 05/29/2008 | 0/0 | | |
| Screened this location: 17 | | | | | |
| Eligible this location: 4 | | | | | |
| Eligible %: 23.53% | | | | | |

Sample Company
 Screened Eligible Hires from 01/01/2008 through 06/30/2010

WOTC Category Analysis



| | | |
|-------------------|----------|---------------|
| Welfare | 2 | 22.2% |
| Military | 0 | 0.0% |
| Priority | 0 | 0.0% |
| Zone | 0 | 0.0% |
| Retain | 1 | 11.1% |
| Summer Youth | 0 | 0.0% |
| Food Stamps | 4 | 44.4% |
| SSI | 0 | 0.0% |
| WTW | 2 | 22.2% |
| Katrina | 0 | 0.0% |
| Disabled Veterans | 0 | 0.0% |
| Total: | 9 | 100.0% |

Eligible Hires: 6
 Multi-Category Hires: 2

Sample WOTC Credit Report
 Hire Dates and Payroll through 12/31/2007
 Printed: 02/27/2008

| Location | Social | Name | Hire Date | Hours | Wages | Eligible @ 25% | Eligible @ 49% | Previous Credit | New Credit | Total Credit |
|----------------------------|-------------|--------------------|-------------|----------|-------------|----------------|----------------|-----------------|------------|--------------|
| 11-11111111 | | | | | | | | | | |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 10/11/2007 | 43.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/28/2007 | 43.00 | \$100.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/21/2007 | 642.00 | \$5,730.18 | \$0.00 | \$5,730.18 | \$0.00 | \$2,292.06 | \$2,292.06 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 05/15/2007 | 1,943.00 | \$30,737.46 | \$0.00 | \$0,000.00 | \$0.00 | \$2,400.00 | \$2,400.00 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/24/2007 | 200.00 | \$2,633.65 | \$0.00 | \$0.00 | \$0.00 | \$656.41 | \$656.41 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 05/16/2007 | 180.00 | \$1,218.70 | \$1,218.70 | \$0.00 | \$0.00 | \$304.06 | \$304.06 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/11/2007 | 180.00 | \$1,159.00 | \$1,159.00 | \$0.00 | \$0.00 | \$294.75 | \$294.75 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/04/2007 | 560.00 | \$7,786.13 | \$0.00 | \$0,000.00 | \$0.00 | \$2,400.00 | \$2,400.00 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 04/17/2007 | 680.00 | \$9,216.13 | \$0.00 | \$0,000.00 | \$0.00 | \$2,400.00 | \$2,400.00 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 04/23/2007 | 200.00 | \$1,511.13 | \$1,511.13 | \$0.00 | \$0.00 | \$377.76 | \$377.76 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 01/06/2007 | 120.00 | \$964.81 | \$964.81 | \$0.00 | \$0.00 | \$241.13 | \$241.13 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 04/23/2007 | 920.00 | \$10,426.28 | \$0.00 | \$0,000.00 | \$0.00 | \$2,400.00 | \$2,400.00 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/29/2007 | 43.00 | \$40.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1810 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 07/01/2007 | 643.00 | \$10,962.00 | \$0.00 | \$0,000.00 | \$0.00 | \$2,400.00 | \$2,400.00 |
| Sub-Total For Location: 14 | | | Sub-Totals: | | 6,240.00 | \$81,649.23 | \$7,466.59 | \$30,730.18 | \$0.00 | \$16,158.81 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 05/10/2007 | 43.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 05/10/2007 | 43.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/17/2007 | 80.00 | \$773.88 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/11/2007 | 560.00 | \$6,714.24 | \$0.00 | \$0,000.00 | \$0.00 | \$2,400.00 | \$2,400.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 10/04/2007 | 43.00 | \$100.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 05/18/2007 | 560.00 | \$6,719.51 | \$0.00 | \$0,000.00 | \$0.00 | \$2,400.00 | \$2,400.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 10/26/2007 | 43.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/20/2007 | 240.00 | \$2,366.59 | \$2,366.59 | \$0.00 | \$0.00 | \$591.65 | \$591.65 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/27/2007 | 43.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 11/12/2007 | 43.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/04/2007 | 43.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 05/10/2007 | 0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/17/2007 | 80.00 | \$337.75 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/27/2007 | 180.00 | \$1,316.15 | \$1,316.15 | \$0.00 | \$0.00 | \$329.04 | \$329.04 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 06/27/2007 | 43.00 | \$40.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 1850 | XXX-XX-XXXX | XXXXXXXXXX, XXXXXX | 10/08/2007 | 43.00 | \$50.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Sub-Total For Location: 16 | | | Sub-Totals: | | 2,640.00 | \$18,828.22 | \$3,682.74 | \$12,300.00 | \$0.00 | \$5,729.69 |
| Sub-Total for FGR: 30 | | | Sub-Totals: | | 8,780.00 | \$106,677.43 | \$11,149.33 | \$47,730.18 | \$0.00 | \$21,879.50 |

- Real-Time Reports
- Drive Savings
 - 75/120 and 400 Hours Report
- Automated Payroll Interface



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