

## Tax Credits and Incentives

# WOTC Online Tax Credit Screening Instructions

WOTC Screening Dedicated URL	<a href="https://secure.talxtei.com/Screening/Direct/?EmployerCode=60733&amp;locationCode=DEFAULT">https://secure.talxtei.com/Screening/Direct/?EmployerCode=60733&amp;locationCode=DEFAULT</a>	
Client Name	MENASHA CORPORATION	MSH
Location Code	DEFAULT	

Every new applicant should go through the Equifax Workforce Solutions WOTC Online Tax Credit Screening process. All applicants deemed potentially eligible must **eSign** the Tax Credit Questionnaire and the Release Statement.

During the Equifax Workforce Solutions WOTC Online Tax Credit Screening process, the applicant will answer a series of questions to determine eligibility for the tax credits. All information gathered during the screening process is applicant specific.

A summary of the steps are listed below:

- The applicant should be directed to your unique Equifax Workforce Solutions WOTC Online Tax Credit Screening URL as shown above.
- The "DEFAULT" screening will be reconciled to the valid location code once the pay file with the proper information is submitted to Equifax Workforce Solutions.
- The applicant will answer a series of questions to determine eligibility for the WOTC tax credits.
- Eligible applicants will be prompted to complete their eSignature for the Tax Credit Questionnaire and Release Statement in a two step process. The eSignature for each form consists of the applicant entering the last 4 digits of their social security number and pressing the "I Accept" icon.
- All applicants will receive a confirmation code upon completion of the Equifax Workforce Solutions WOTC Tax Credit Screening process. A "Finished" message and a confirmation code will be displayed. All applicants should click the "Close Window" button to end the Equifax Workforce Solutions WOTC Online Tax Credit screening.

The eSignature process eliminates the need for submitting wet signature paper forms to Equifax Workforce Solutions for applicants screening and eSigning online. If an applicant eSigns, do not send signed paper forms to Equifax Workforce Solutions.

Occasionally, an applicant may inquire as to the nature of the WOTC screening. You may reassure an applicant by relaying that your company participates in federal and state incentive programs in an effort to minimize your cost of doing business. The company is always looking at innovative ways to reinvest in their workforce and would appreciate the few extra minutes needed for the applicant to complete the screening and eSign the forms if they are eligible. You can stress to the applicant that their responses to the questionnaire will in no way affect their employment opportunity and that their responses will be kept confidential.

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## WOTC Best Practices

### Best Practices to Achieve High Compliance

All WOTC screening must be completed on or before date of job offer to be compliant with the IRS requirements for WOTC.

WOTC screening after this date will not be valid, resulting in a lost opportunity for your organization.

Here are some important best practices that you should incorporate into your process to be sure that your applicants have screened on or before this important date:

- Ensure that during the application process, applicants are given easy, uninterrupted access to the WOTC screening.
- Prior to completing the WOTC screening process, provide additional information to the applicant, so they are comfortable with understanding the process and the purpose of the screening.
- On or before the date of job offer, the hiring manager should log into the Equifax Hiring Manager Online tool to lookup the individual to verify that screening and eSignature (if applicable) has been completed.
- On or before the date of job offer, require your job applicants to provide to the hiring manager the Confirmation Code that is provided at the end of the WOTC screening. By requiring this, you can be sure that the individual has successfully completed the screening process.
- Work directly with Equifax Workforce Solutions to incorporate these best practices to ensure the maximum tax credit opportunity for your organization. Adopting a consistent process across your entire organization will yield the best results!

If we can be of service assisting with the enhanced Equifax Workforce Solutions WOTC screening process, please contact our Client Service line at 1-800-578-6716 or email [tcj-customerservice@equifax.com](mailto:tcj-customerservice@equifax.com).

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**NOTE: Avoid these 2 mistakes and your location will achieve maximum compliance and credits:  
No Screening - No CREDIT | No eSignature - No CREDIT**