

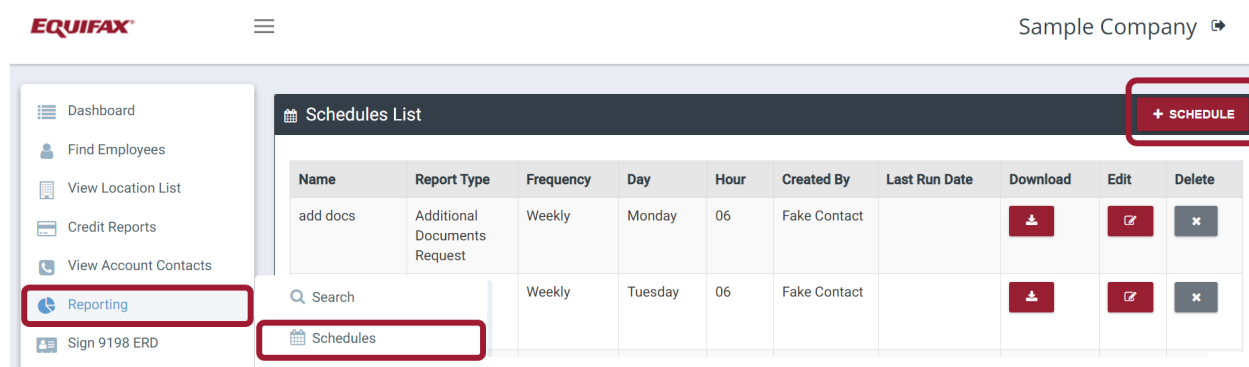
Client Training HQ

How to Schedule a Report in WOTC

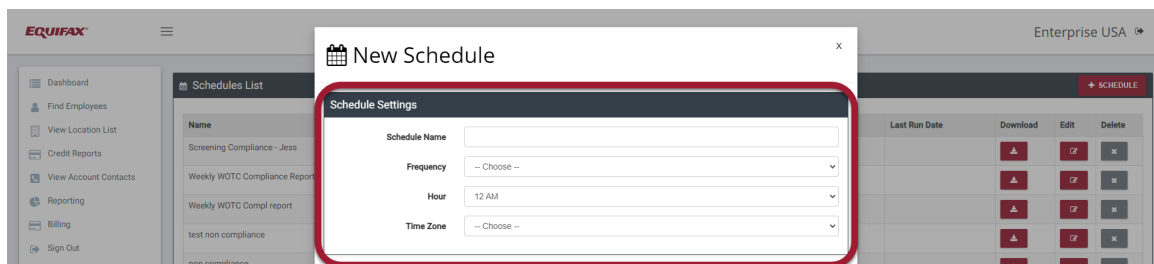
Please note that not all reports are currently available for all accounts and for all users.

To schedule a WOTC Report, complete the following steps:

1. Log in to your Client Portal using your provided link.
2. From the Dashboard, click **Reporting**.
3. Select **Schedules** from the left side menu.
4. Click the **+Schedule** button on the right.



5. Fill in the information requested, i.e., the name of the schedule you are setting up (example: Weekly Compliance Report, etc. - You can name this whatever you would like), the frequency that you would like it to be sent to you, what time of the day, and the time zone you are in:



Images are examples and for information purposes only. They may vary across platforms and are subject to change.

6. Choose the report you would like to schedule:

NEW Schedule

Schedule Settings

Schedule Name:

Frequency:

Hour:

Time Zone:

Report Settings

Report Type:

Notification Subscribers

First Name	Last Name	Phone Number	Mobile Number	Fax	Email

SAVE **CLOSE**

7. Choose your name or anyone you would like to receive the report from the list of Subscribers and then click **Save**:

Add Subscriber(s)

Contacts

	First Name	Last Name	Phone Number	Mobile Number	Fax	Email
☐	Test	User1	314-555-5555			test.user1@equifax.com
☐	Test	User2	314-555-1234			test.user2@equifax.com
☐	Test	User3	314-555-5678			test.user3@equifax.com

SAVE **CLOSE**

8. Once the report is scheduled and set up, you will receive an email notification.

More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.

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