EQUIFAX®

Client Training HQ

WOTC Paper Forms Screening Instructions

WOTC stands for Work Opportunity Tax Credit, a federal program designed to encourage companies, through significant tax credits, to hire people with predetermined barriers to finding work. Candidates will be presented with a survey as part of the employer onboarding process.

Who should complete a WOTC Online Screening?

Any candidate going through the onboarding process should complete a WOTC questionnaire. Rehires can also apply if they are rehired within their first screening year.

The Paper Screening Process:

1. Applicants must complete three forms with original signatures on all forms:
   a. **IRS Form 8850**- Have company-specific information printed at the top of the form*.
   b. **Tax Credit Questionnaire (TCQ)**- Used in the certification process.
   c. **Self-Attestation Form (SAF)**- Used to determine target group eligibility.
2. Transmit all three forms for review and submission:
   a. Scan or email completed forms to wotcforms@equifax.com
   or fax to 800.570.9830.
   b. If deadline is within 4-5 days or less, you may also fax or email forms to:
   Fax: 800.887.7173 - **Scan/Email:** wotcpriorityforms@equifax.com

Frequently Asked Questions:

1. **What if an applicant refuses to complete the form?**
   a. Put the employee's name, SSN, address, your Employer Code*, indicate their refusal on all forms, and mail the forms to Equifax® using pre-addressed envelopes.
2. **Where do I get additional supplies and pre-addressed envelopes?**
   a. Please reach out to tci-supplies@equifax.com for additional supplies.

Who can I contact for additional questions?

Support: Hours of operation - Monday - Friday 7 a.m. - 5 p.m. CST
Contact Us: 855.844.3350 - wotcsupport@equifax.com

More Training Available!

Check out additional training resources available on our site, Connections.

*If you do not know your Employer Code and/or Location Code, please call your support team.

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.