



Your WOTC Process: What to Expect

Our WOTC Solution makes your hiring process easier by connecting screening directly with your ATS (Applicant Tracking System) or onboarding platform. Our automated process helps reduce manual work and may lead to higher completion rates. We can help you simplify WOTC screening for both employers and new hires by possibly integrating screening into your ATS or onboarding platform. Plus, our real-time reports keep you updated on your WOTC process status.



Steps

- 1 Complete Form 9198 ERD
- 2 Implement Screening
- 3 Start Screening
- 4 Reporting Options

STEP 1: Complete Form 9198 Employer Representative Declaration

Activate your [WOTC Portal account](#). To establish your service, you'll enter the site and verify some information, then sign documents digitally. Form 9198, the Employer Representative Declaration (ERD), is required by the Department of Labor (DOL) for WOTC. It allows a third party like Equifax to help you manage your WOTC certification requests with State Workforce Agencies (SWAs). You will digitally complete and sign this form in the WOTC dashboard by selecting **Sign 9198 ERD**. After all ERDs are submitted, you'll receive a confirmation email with the signed form(s).

STEP 2: Implement Screening

Decide which screening method works best for you:

- When applicants or new hires complete their screening via website or through integration, they receive a reference number. You can ask for this number to confirm completion and track it on your Client Portal.
- For online screenings, place the WOTC link in your hiring process—such as in the application, offer letter, or onboarding—to help you increase completion rates.
- Screening at the application stage (ATS) or possibly integrating into your new hire/onboarding platform could help provide better results in the WOTC process.
- **Important Note:** All new hires must complete the WOTC screening per the requirements to meet IRS standards.

STEP 3: Start Screening

Applicants and new hires go to a screening website to answer a series of online questions. After they finish, they'll either get a reference number right away or be asked for an eSignature before getting this number. If an applicant has already started screening, they can log in using their specific screening URL and required authentication. They can then resume from where they left off, to finish the process.

STEP 4: Reporting Options in the Client Portal

Our WOTC reports give you the opportunity to receive detailed information about your program's performance and participation. Some possible options are:

- **Overall Compliance Report** shows new hires, screening timeliness, missing Form 8850 signatures, and overall eligibility and participation.
- **Additional Documentation Report** highlights any missing state-required documents, which you can submit confidentially to help speed up processing. *(upon request)*
- **WOTC Snapshot** provides a summary of account activity and screening statistics for the most recent month.
- **WOTC Tax Filing/Credit Report** details your WOTC credits. *(upon request)*
- **Credit Maximizer Report** lists employees that have not reached their minimum work requirement to achieve their potential tax credit.