

Client Training HQ

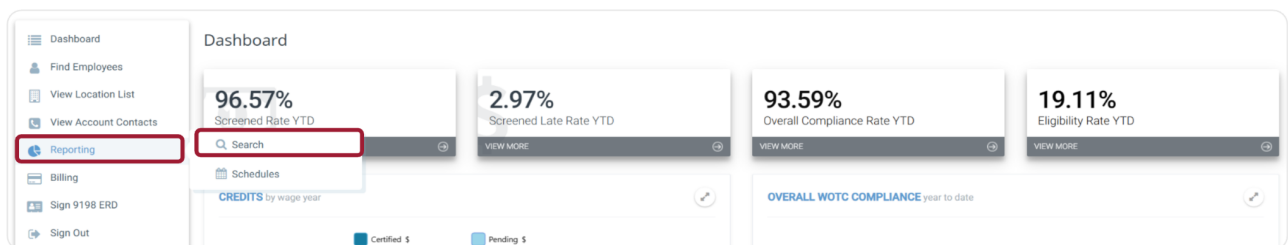
How to Run A Tax Credit Report in WOTC

This report shows the total pending and total certified WOTC credits broken out by year and by tier/group level.

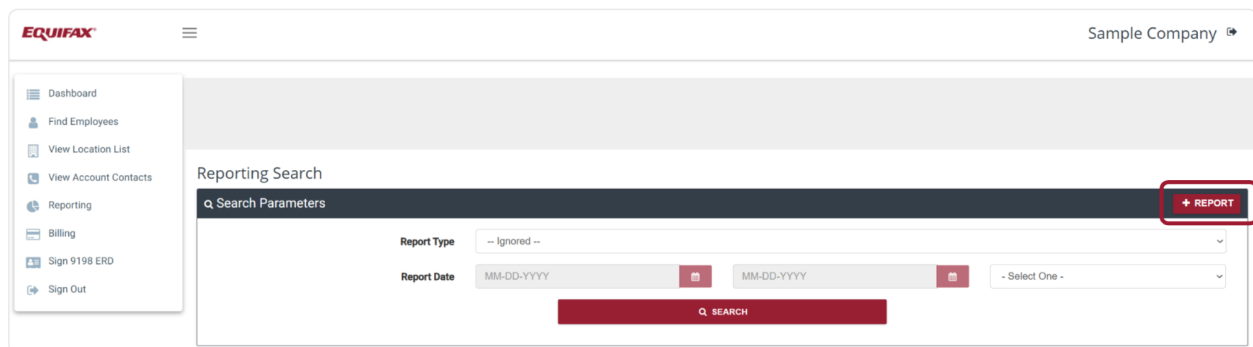
Note: This report may or may not be available based on your organization's configurations.

Steps to Run a Tax Credit Report

1. From the left navigation menu, click **Reporting** and then **Search**.

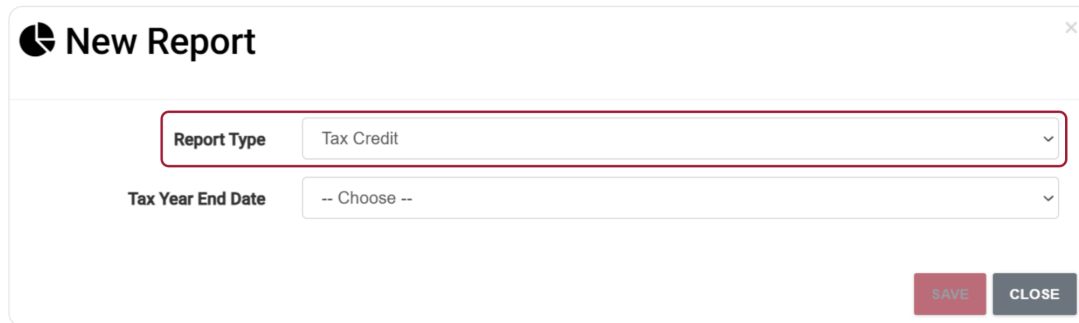


2. Click **+Report** in the upper right corner.



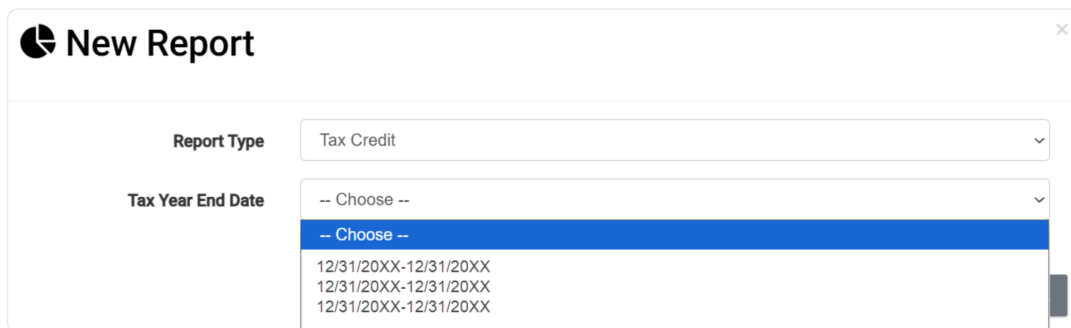
Images are examples and for information purposes only. They may vary across platforms and are subject to change.

- From the drop-down menu, click **Tax Credit**.



The image shows a 'New Report' form. At the top left is a pie chart icon and the text 'New Report'. Below this, there are two dropdown menus. The first is labeled 'Report Type' and has 'Tax Credit' selected. The second is labeled 'Tax Year End Date' and has '-- Choose --' selected. At the bottom right, there are two buttons: 'SAVE' (red) and 'CLOSE' (grey).

- Click the **Tax Year End Date** drop-down and choose the timeframe to include in the report. Then, click **Save**.



The image shows the 'New Report' form with the 'Tax Year End Date' dropdown menu open. The dropdown menu shows the following options: '-- Choose --', '12/31/20XX-12/31/20XX', '12/31/20XX-12/31/20XX', and '12/31/20XX-12/31/20XX'. The first option is highlighted in blue.

Note: Run a report for each tax year to check for any increases in tax credits due to recently received certifications from State Workforce Agencies.

- The generated **Tax Credit report** appears in the Results section. Click the arrow in the **Download** column to view the report. The report export format will Excel.



The image shows a 'Results (Total = 1)' section. It contains a table with the following columns: 'Id', 'Title', 'Generated On', 'Generated By', and 'Download'. The table has one row with the following data: 'XXXXXXX', 'WOTC Tax Credit Report_XXXXXXXXX', 'Jun 30, 20XX', 'Sample User', and a download icon (a red square with a white arrow pointing down). Above the table, there are buttons for 'PREVIOUS' and 'NEXT', and text indicating 'Showing page 1 of 1'.

Id	Title	Generated On	Generated By	Download
XXXXXXX	WOTC Tax Credit Report_XXXXXXXXX	Jun 30, 20XX	Sample User	

Note: The tax credits on both the Certified and Pending Detail tabs are not subtotaled by tax year. Additionally, remember that you can only take advantage of certified tax credits on your federal tax return.

The **Tax Credit Report** is broken down into several tabs. You can move between the tabs at the bottom of the Excel file. A breakdown of what is shown in each report is listed below.

- | XXXXXX - Sample Company | B | C | D | E | F | G | H | I | J | K | |
|----------------------------|---------|---------------|-----------------|---------|----------------|---------|----------------|----------|----------------|---------|-------------|
| WOTC Tax Credits | | | | | | | | | | | |
| Report Run Date: 6/30/20XX | | | | | | | | | | | |
| 4 | | | FYE 12/31/20XX | | FYE 12/31/20XX | | FYE 12/31/20XX | | FYE 12/31/20XX | | |
| 5 | Group | Total Pending | Total Certified | Pending | Certified | Pending | Certified | Pending | Certified | Pending | Certified |
| 6 | Group A | \$XXXXXX | \$XXXXXX | \$0.00 | \$0.00 | \$0.00 | \$XXXXXX | \$0.00 | \$XXXXXX | \$0.00 | \$XXXXXX |
| 7 | Group B | \$XXXXXX | \$XXXXXX | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$XXXXXX | \$XXXXXX | \$0.00 | \$XXXXXX |
| 8 | Totals | \$X,XXX,XXX | \$XX,XXX,XXX | \$0.00 | \$0.00 | \$0.00 | \$X,XXX,XXX | \$XXXXXX | \$XX,XXX,XXX | \$0.00 | \$X,XXX,XXX |
| 9 | | | | | | | | | | | |

- | | A | B | C | D | E | F | G | H | I |
|---|--|----------|-------------|-------------|------------|------------|---------------------|------------|-----------------|
| 1 | XXXXXX - Sample Company | | | | | | | | |
| 2 | WOTC Certified Tax Credits by Location | | | | | | | | |
| 3 | Report Run Date: 06/30/20XX | | | | | | | | |
| 4 | | | | | | | | | |
| 5 | Tier 2 | Location | Fiscal Year | SSN | Last Name | First Name | Target Group | Hire Date | Last Check Date |
| 6 | Group A | XXX | 12/31/20XX | XXX-XX-XXXX | XXXXXXXXXX | XXXXXX | WOTC-Food Stamp (G) | 11/16/20XX | 11/17/20XX |
| 7 | Group B | XXX | 12/31/20XX | XXX-XX-XXXX | XXXXXXXXXX | XXXXXXXXXX | WOTC-Food Stamp (G) | 11/16/20XX | 11/21/20XX |
| 8 | | | | | | | | | |
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Summary

Certified Detail

Pending Detail

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[illegible]

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- **The Pending Detail tab of the Tax Credit Report:** This tab provides pending tax credits by employee. Scroll right to see wages at 25%, 40% and 50%. This can include previous tax years.

Note: You will not receive all of the pending credits listed, as not all of them will actually be certified.

Location	Fiscal Year	SSN	Last Name	First Name	Target Group	Hire Date	Last Check Date	Certification Date	Status
Group A	XXXX	XXX-XX-XXXX	XXXXXXXXXX	XXXXXX	WOTC-Food Stamp (G)	10/12/20XX	11/16/20XX	11/17/20XX	P
Group B	XXXX	XXX-XX-XXXX	XXXXXXXXXX	XXXXXXXXXX	WOTC-Food Stamp (G)	9/18/20XX	11/16/20XX	11/21/20XX	P

Hours	Wages	Credit	Wages	Credit	Wages	Credit	Calc Type
XXXXXX	\$X,XXX.XX	\$XXX.XX	\$0.00	\$0.00	\$0.00	\$0.00	R
XXXXXX	\$X,XXX.XX	\$XXX.XX	\$0.00	\$0.00	\$0.00	\$0.00	R

Note: The columns of this report have been resized for better viewing.

Defining Pending versus Certified Credits

Pending Credits: Pending credits are for individuals that have worked enough hours to generate tax credits; however, the State Workforce Agency has yet to issue a determination. You cannot take advantage of the pending credits on your federal tax return.

Certified Credits: Certified credits are for individuals that have been certified as eligible by the state and have worked enough hours to generate tax credits. You can take advantage of the certified tax credits on your federal tax return by populating IRS 5884 ([IRS website](#)).

Due to states not having a deadline to issue a determination and most states being behind in their processing, it could take several years before receiving a determination. Due to the backlog, the IRS issued a Joint Directive allowing employers to take advantage of the certified tax credits in the "certified year" rather than the year the wages were paid (see IRC § 51 on the [IRS website](#)). The Tax Credit Report is sorted by fiscal year then by the most recent certification date. Review data for prior tax years to see if there have been any certifications with a certificate date after you filed last year's tax return ([IRS website](#)).

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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