

# How to Setup & Utilize Experian WOTC Integration

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## Experian WOTC

Experian helps you as the staffing company maximize the benefits of participating in the WOTC (Work Opportunity Tax Credit) program as well as utilizing these features through HRCenter with TempWorks.

**\*Note\*** If you are interested in the Experian WOTC integration, please contact your TempWorks Account Manager for pricing and setup inquiries.

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## Experian Workflow

The following is the workflow for how the Experian WOTC integration functions:

1. TempWorks completes the initial setup of the integration.
2. User runs the Payroll Retro File and sends to Experian.
3. TCC WOTC page is setup within HRCenter Admin by TempWorks.
4. TCC WOTC page is added/replaced within an HRCenter workflow by the user.
5. HRCenter workflow is assigned to the employee(s) to complete by the user.
6. Employee completes the assigned TCC WOTC page within the HRCenter workflow.
7. Experian reports and logs results as a message on the employee file with the potential WOTC eligibility status.

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## Initial Integration Setup

After reaching out to your TempWorks Account Manager, a TempWorks representative will complete the initial setup of the Experian WOTC integration.

Once the initial setup is complete, you will need to run the Payroll Retro File and send the file to Experian.

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## Running the Payroll Retro File

The Payroll Retro File takes multiple weeks' worth of data and combines it into a single file which can be sent to

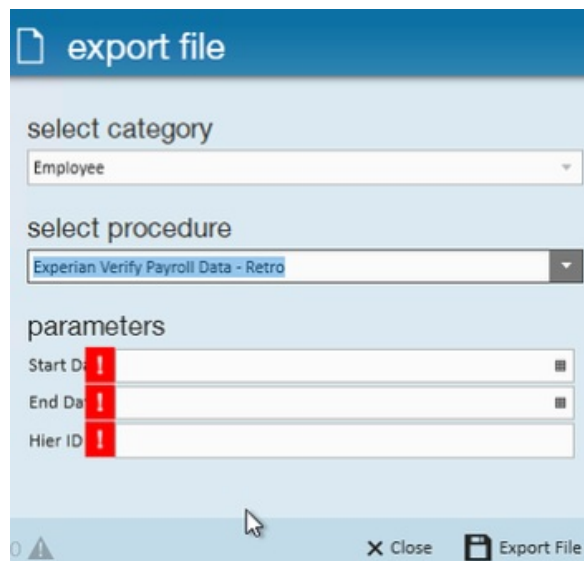
Experian.

**\*Note\*** As part of setup, Experian may request up to three years of retro pay data.

This file can be downloaded by navigating to Enterprise > Pay/Bill > Action's Menu > Exports:

- **Category:** Employee
- **Procedure:** Experian Verify Payroll Data - Retro
- **StartDate:** Weekend Bill Start Date
- **EndDate:** Weekend Bill End Date
- **Hier ID:** Enter your appropriate Hier ID that is relative to the information that will be pulled into the file.

**\*Note\*** If you are uncertain as to the Hier ID to enter within the "Hier ID" field, please contact [TempWorks Support](#) for assistance.



**\*Note\*** If there are any issues when downloading, please break up the file into smaller timeframes of 6 months to 1 year and combine the individual files to house all the data within the intended date ranges.

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## HRCenter Page Setup

The TCC WOTC HRCenter page will be setup by a TempWorks representative.

**\*Note\*** Once initial Experian setup is completed, you will need to add the TCC WOTC page to your HRCenter workflow via the instructions outlined below.

## Adding the TCC WOTC Page to an HRCenter Workflow

Within HRCenter Admin, select the "Workflows" tab on the left, find the workflow you would like to add/replace the TCC WOTC page within, and select "Edit" within the "Steps" section:

The screenshot displays the HRCenter Admin interface. The left sidebar has the 'Workflows' tab highlighted. The main content area is titled 'Employee Workflow Settings'. It contains several sections: 'Name' (Employee Workflow), 'Description' (A workflow for applicants to complete), 'Primary Actor Type' (Employee), 'Public' (Allow applicants to select this workflow during registration? No), and 'Branch Visibility' (Nothing selected). The 'Steps' section shows a table with one step named 'Complete' (11 Pages) and an 'Edit' button highlighted in red. The 'Actions' section is also visible.


Within the "Edit Existing Step" window, select the ">" to continue to the next step:

**Edit Step** ✕

## Edit Existing Step

A step is composed of any number of unique pages that ask the applicant information that you may inquire about.

**Name**

**Step Introduction Text**

Within the "Assign Pages" window, you can do one of the following:

- If the workflow contains a previous WOTC page, de-select it from the list and select the new TCC WOTC V2 page within the list.
- If the workflow does not contain a previous WOTC page, select the new TCC WOTC V2 page within the list.

**\*Note\*** If you are currently using the original TCC WOTC page, you can replace it with the new TCC WOTC V2 page within your HRCenter Workflows.

This is depicted within the below screenshot. The original WOTC article is being de-selected, and the new TCC WOTC V2 page is being selected.

**\*Note\*** When adding the TCC WOTC page to your workflow, **do not** select the Federal 8850 form.

The Federal 8850 form should only be used if you are processing WOTC on your own and is not affiliated with Experian.

Once the pages have been added/removed from the step, select the ">" to continue to the next step:

**Edit Step** ✕

## Assign Pages

Pages are the heart beat of the application. They are the containers of questions, or data, that you wish to receive from your applicants. You can always do this later.

Info	Availability - Default	✓
Survey	Basic Info - Default	✓
Form	Contact Information - Default	✓
Saved Pages <span>11</span>	Education - Default	✓
	EEO - Default	✓
	Languages - Default	✓
	References - Default	✓
	Skills - Default	✓
	<b>TCC WOTC V2</b>	✓
	Transportation - Default	✓
	Work History - Default	✓
	<b>WOTC</b>	

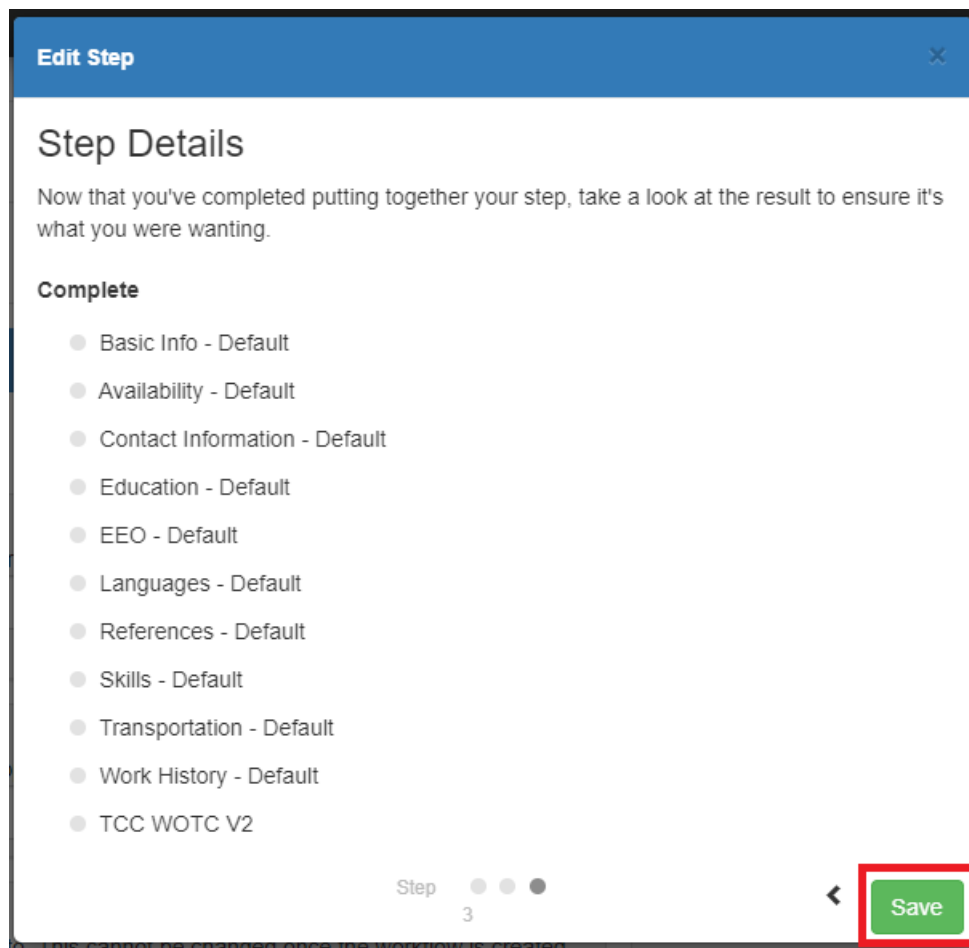
Step 2 ◀ ▶

**\*Note\*** Experian requires the following fields to have information before the employee completes the TCC WOTC V2 page:

- SSN
- First Name
- Last Name
- Address
- City
- State
- Zip Code

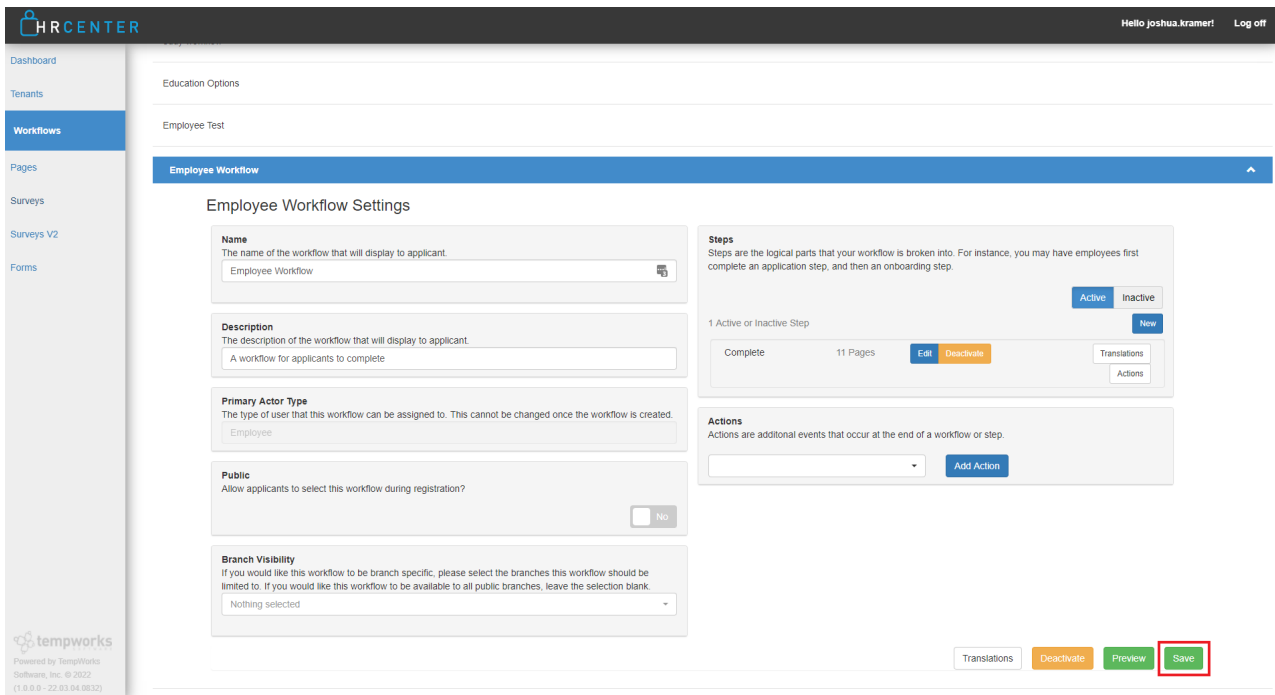
When adding the TCC WOTC V2 page within your workflow, it should be placed in an order so that the employee has the above information entered before getting to the TCC WOTC V2 page within the workflow.

Verify the pages have been included within the step and select "Save" to finalize the changes:



Once the step has been saved, you will be navigated back to the workflow overview.

Select "Save" on the workflow overview within HRCenter Admin to save the changes made:



With the workflow changes saved, it can be assigned to applicants to complete.

## Assigning an HRCenter Page and/or Workflow

Once the workflow changes have been saved, the page and/or workflow will need to be assigned to the employee.

The process for assigning pages and/or workflows depends on whether you are using Enterprise or Beyond.

**\*Note\*** For more information on assigning HRCenter pages and workflows, please see the following articles:

- Enterprise - [Assigning HRCenter Workflows/pages](#)
- Beyond - [How to Assign a New HRCenter Workflow or Page](#)

## Completing the TCC WOTC Questionnaire

Once the page has been assigned to the employee, the employee will access the page via HRCenter.

Once the employee arrives on the TCC WOTC page, they will select the "Continue" button:

Previous Page 1 of 2 Save and Continue

### WOTC Tax Credit

Our company participates in the Work Opportunity Tax Credit (WOTC) program, a voluntary government program designed to stimulate hiring for individuals that meet certain criteria. Part of the application process involves completing the following questionnaire. Press continue to begin.

**Continue**

Upon selecting "Continue", the applicant will answer the questions presented to them within the survey and select "Next" once they are ready to continue:

Previous Page 1 of 2 Save and Continue

SELECT LANGUAGE ▾

At this time, please answer Yes or No to the following questions:

**In the last year, have you or anyone you've lived with received SNAP (Supplemental Nutrition Assistance Program also referred to as food stamps)?**

Yes  No

**In the last two years, have you or anyone you've lived with received TANF (Temporary Assistance for Needy Families also referred to as welfare)?**

Yes  No

**Are you a veteran of the U.S. Military/Armed Forces?**

Yes  No

**Are you a person who has a disability?**

Yes  No

**Have you ever been convicted of a felony?**

Yes  No

**Are you unemployed?**

**And**

**Have you collected unemployment benefits at any time during your unemployment period?**

Yes  No

**In the last two weeks, have you applied for or received unemployment benefits?**

Yes  No

**Next**

**\*Note\*** Depending on how the applicant answered the initial questions, additional questions may be asked:

Previous Page 1 of 2 Save and Continue

SELECT LANGUAGE ▾

**You indicated that you have served in the U.S. Military.**

**In which military branch did you serve?**

**What is your military status?**

**What was your Enlistment Date?**

**What was your Discharge Date?**

**Within the last year, were you unemployed at any point - even for just a few days?**

No  Less than one month

Between one and six months  Longer than six months

**Next**

The applicant will need to answer the follow-up questions before being able to proceed.



Once all of the questions have been answered by the applicant, they will need to confirm their First and Last name and select "Submit form" to complete the process:

Previous Page 1 of 2 Save and Continue

SELECT LANGUAGE ▾

**Additional Information**

Thank you for taking the time to complete this survey related to IRS Form 8850 (Pre-screening Notice and Certification Request for the Work Opportunity Tax Credit) and the ETA Form 9175 (Long-Term Unemployment Recipient Self-Attestation Form). These forms are used to verify the information you have provided and to manage the important WOTC jobs program.

If you agree with the following declaration, click the submit button to electronically sign the Forms 8850 and (if applicable) 9175. Your electronic signature will authorize the Veterans Administration, Department of Vocational Rehabilitation, Tribal Governments, federal and state unemployment insurance offices, or other applicable agency to release verification of information to TCC. If the name is incorrect, type in your correct name and click the submit button to electronically sign.

*Under penalties of perjury, I declare that I gave the above information to the employer on or before the day I was offered a job, and it is, to the best of my knowledge, true, correct, and complete.*

Please confirm your first and last name:

Joshua Testing

Submit form

With the form submitted successfully, the applicant will select "I am finished! Submit." to complete the workflow:

**Review & Submit**

All questions have been answered in this part of the application.

Now, you can go back and review or change any part of your answers. To do so, click on the link labeled "Go back and review my work".

When you are sure that all the information is correct, click on the button labeled "I am finished! Submit". By doing this, you confirm that all the information is complete and correct. You will not be able to change your answers after this step.

HR CENTER

Go back and review my work

I am finished! Submit.

Once the workflow is completed by the employee, a message will be logged on that respective employee record.

## Message Linking

Once the survey has been completed by the applicant, a message will be logged on their employee profile, indicating their potential WOTC eligibility status:



**\*Note\*** The TCC WOTC message is logged using the standard "Message" Action Code.

## Hiring Card

The "WOTC Eligibility Status" field in the Hiring Card on the employee record will be updated based on the survey results.

Hiring			
Washed Status	Web Applicant	Hire Status	Web Pending >
Job Order Type	Temp	Profession	All
Job Title	--	Vendor	--
Orientation Date	--	Anniversary Date	--
Activation Date	4/21/2022	Deactivation Date	--
Interviewed By	--	I-9	Not On File
Entered By	HRCenter twdemo	Staffing Specialist	HRCenter twdemo
Numeric Rating	0	WOTC Eligibility Status	Eligible

## Related Articles