

# Work Opportunity Tax Credit (“WOTC”) Free Lookback Review for 2015

STEP 1	STEP 2	STEP 3
Employee Roster	Employee Notification Campaign	Employee Eligibility Reporting
<p>Employee Roster should include the following data elements:</p> <ol style="list-style-type: none"> <li>1. Employee Name</li> <li>2. Cell Phone Number</li> <li>3. Email Address</li> <li>4. Start/Term Date</li> <li>5. Cumulative hours worked</li> </ol> <p>*Cell phone and email addresses are used to notify employees to complete the online WOTC Questionnaire.</p> <p>*Start date is needed to determine eligibility.</p>	<p>Once the Employee Roster has been provided, Clarus will launch the Employee Notification Campaign.</p> <p>Clarus will notify each employee on the roster via text and/or email. The campaign is focused on getting each employee to complete the online WOTC Questionnaire. Each text/email message will contain a link to our online WOTC Questionnaire (to be branded with your logo).</p> <p>*The questionnaire takes less than three minutes to complete and helps Clarus determine eligibility.</p>	<p>The campaign duration is determined by the number of employees in the field (5 working days for every 750 employees in the field).</p> <p>Throughout the campaign, Clarus will monitor the number of online WOTC Questionnaires completed, as well as how many employees are potentially eligible. Clarus will provide weekly reports detailing the number of completed questionnaires and potential eligible employees.</p> <p>The goal of the campaign is to collect more than 90% of your employees completed questionnaires. This gives Clarus the best opportunity to maximize your tax credit.</p>

**Final Step (Step 4)** – After the completion of the Free Lookback Review, and upon approval from your organization, Clarus will start the process of certifying each employee with the appropriate State Workforce Agencies. Clarus will provide progress reports through this phase of the program. This ensures that your organization is up-to-date on your accumulated tax credit.

**Additional Recommendations:**

\*Before the start of the Employee Notification Campaign, Clarus recommends alerting internal recruiting and payroll personnel who are in contact with your employees in the field. Some employees will contact your internal personnel with questions and comments since you are their employer.

\*Before the start of the Employee Notification Campaign, Clarus recommends placing a notification within the Employee Portal system urging employees to complete the WOTC Questionnaire.

\*Clarus can support onsite WOTC Questionnaire completion as well. We have the ability to print our proprietary WOTC Questionnaire for onsite distribution. Clarus can even design and print 'paycheck stuffers' as well as printed post cards that provide a link to the online WOTC Questionnaire.



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