WORK OPPORTUNITY AND WELFARE-TO-WORK TAX CREDITS REPORTING SYSTEM

User's Guide

U.S. Department of Labor
Employment and Training Administration

Contents

Accessing WOTC/WtW Tax Credits Reports

Follow the steps below to access the **ETA WOTC/WtW Tax Credits Reports**.

1.   Open your Web browser and type the following address in the URL location field at the top of the window: **http://www.etareports.doleta.gov** (Figure 1).
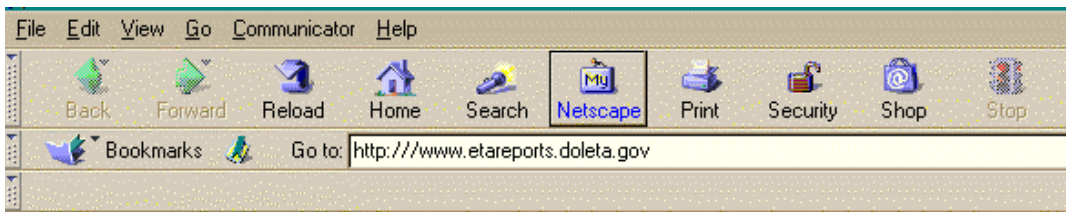
Figure 1: Web Browser – Location Field Displayed

2.   Press **Enter.** The **ETA Grantee Reporting System Login** window is displayed (shown in Figure 2).

Figure 2: Grantee Reporting System Login Window

3. Type the Password. Click **Login**. The **WOTC/WtW Tax Credits Reports Selection** (main menu) window is displayed (Figure 3).

WOTC/WtW Tax Credits Reporting System (TCRS)

Please Choose a Report

WOTC/WtW Tax Credits Reports:	Conditional Certifications Issued ▾

Continue

Main Menu   List of Edit Checks   Log out

Figure 3: WOTC/WtW Tax Credits Reports Selection Window

Accessing/Reviewing the Edit Checks List for WOTC/WtWTC

Follow the steps below to access and review the **Tax Credits Reporting System Edit Checks** list. This is a list of fields that have unique edit checks (standard edits plus additional edits). The list is provided as a user aid. For example, you can look at the list to quickly determine the formula that the system uses to calculate a particular field **or** to find out which fields are automatically calculated by the system.

1.   Click **Edit List** from any window in the WOTC/WtWTC system. The **Tax Credits Reporting System Edit Checks** list is displayed (Figure 4).

2.   The edit checks are arranged according to the report name and then the report sections. It provides the following information for each field in the list**: Type of Field**, **Edit Check**, **Edit Check Message**.

3.   **To print a list of the edit checks**, click the **Print** icon on the browser menu bar. A complete copy of the list is attached to this document in the **Appendix** section.

4.   **To return to the previous window**, click **Back** at the top of the window, under the title.

Figure 4: WOTC/WtWTC Edit Check List

Conditional Certifications Issued – Report No. 1

Accessing Conditional Certifications Issued (WOTC/WtWTC Report No. 1)

Follow the steps below to access the **Conditional Certifications Issued Report**. You can enter or update data in the report form. The data can be saved without a PIN or saved and submitted with a PIN. General **field** instructions are provided online. Also, a copy of the report can be printed for your records.

1. Access the **WOTC/WtW Tax Credits Reports Selection (main menu)** window (see Figure 3).

2. Click the arrow at the end of the **WOTC/WtW Reports** field and select **Conditional Certifications Issued**. The **Choose Quarter End Date** (for WOTC/WtWTC Report No. 1) window is displayed (Figure 5).

Figure 5: Choose Quarter End Date Window

3. Click the arrow at the end of the **Quarter End Date** field and select the desired quarter ending date from the list.

4. Next, click **Continue**. The **WOTC/WtWTC Conditional Certifications Issued/Report No. 1** is displayed (Figure 6).

Conditional Certifications Issued
Work Opportunity and Welfare-to-Work Tax Credits
(Report No. 1)

Work Opportunity and Welfare-to-Work Tax Credits - Report No. 1 for 12/31/2001
Awaiting State Certification as of 11/05/2002 03:30:09

State	Quarter Ending		OMB Approval
TENNESSEE	12/31/2001	Persons are not required to respond to this collection of information unless it displays a currently valid OMB control number. Respondents' obligation to reply to these reporting requirements are mandatory (P.L. 104-188). Public reporting burden for this collection if information is estimated to average 8 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to the U.S. Department of Labor, U.S. Employment Service, Room C-4514, Washington, D.C. 20210 (Paperwork Reduction Project 1205-0371)	No. 1205-0371 Expires:

I. By Issuing Agency	Number of Conditional Certification Issued			II. By WOTC Target or Long-Term IV-A Recipient Group	Number of Conditional Certification Issued		
	WOTC	WtW	Dual Tax Credit		WOTC	WtW	Dual Tax Credit
1. Employment Service Offices	0	0	0	11. IV-A Recipient	0		0
2. 1-Stop Career Centers	0	0	0	12. Veteran	0		0
3. WIA LWIAs, Partner Agencies, and Tmg Providers	0	0	0	13. Ex-Felon	0		0
				14. High-Risk Youth (EZ/EC/RC)	0		0
4. Voc Rehab Agency	0	0	0	15. Voc Rehab Referral	0		0
5. Veteran Affairs Offices	0	0	0	16. Summer Youth (EZ/EC/RC)	0		0
6. Welfare Offices	0	0	0	17. Food Stamp Recipient	0		0
7. Social Security District Offices	0	0	0	18. SSI Recipient	0		0
8. All Other Participating Agencies	0	0	0	19. Long-Term IV-A Recipient(WtW)		0	
9. TOTAL (for quarter)	0	0	0	20. TOTAL (for quarter)	0	0	0
10. TOTAL (year-to-date)	0	0	0	21. TOTAL (year-to-date)	0	0	0
TOTAL (Quarters Item 9 + 20)	0			TOTAL (year-to-date Item 10 + 21)	0		

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Please press the Save button to save: [Save]

Please enter your pin number to submit: [_____] [Submit]

Please press the print button to print: [Print]

Main Menu   List of Edit Checks   Log Out

Figure 6: WOTC/WtWTC Conditional Certifications Issued (Report No. 1)

Entering WOTC/WtWTC Conditional Certifications Issued (Report No. 1)

1. Type the report data in the fields within the white boxes. Only numeric values may be entered. No decimals or minus numbers are allowed (e.g., 4**.**5 or **-**25). The numbers are automatically formatted by the system (e.g., commas are system-generated). The maximum number of digits that can be entered is 8. If there is no data for a field, a zero must be entered. Fields within a shaded box are calculated automatically and you cannot enter data in them. Press the **Tab** key to move from field to field.

Note: General instructions for the report fields can be viewed online by clicking any underlined field title (e.g., Employment Service Offices). To return to the form from the online instructions, click the underlined title at the top of the instructions.

2. When you are ready to save the report, you can **save (only)** without a PIN or **submit and save** with a PIN.

Save Only (without a PIN): Click **Save**. A message is displayed (Figure 7) to confirm that the report is saved, but not submitted. Click **OK**. The confirmation message is displayed (Figure 8). It provides the name of the state, report period, and date that the report was saved/modified. Click the **Print** icon from the browser menu bar to print a copy of the message window. Click the **Back** button on the browser menu bar to return to the report. Otherwise, you may click **Main Menu** to return to the **WOTC/WtW Tax Credit Reports Selection** (main menu) window or click **Log Out** to return to the **ETA Grantee Reporting System Login** window.
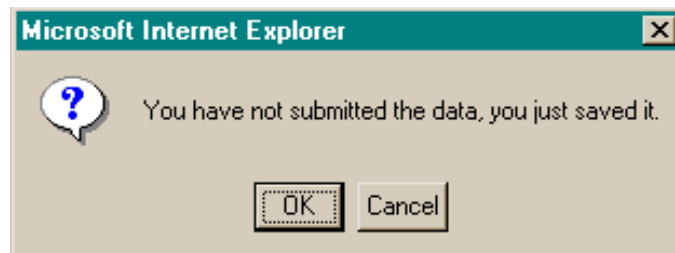
Figure 7: Save Confirmation Dialogue Box

WOTC / WtW TC - Report No. 1 : Conditional Certifications Issued
State: VIRGINIA
Report Period: 12/31/2001
Has been modified on 11/05/2002 01:33:33 and is awaiting Certification.

Main Menu   List of Edit Checks   Log Out

Note: Please print the screen for your records.
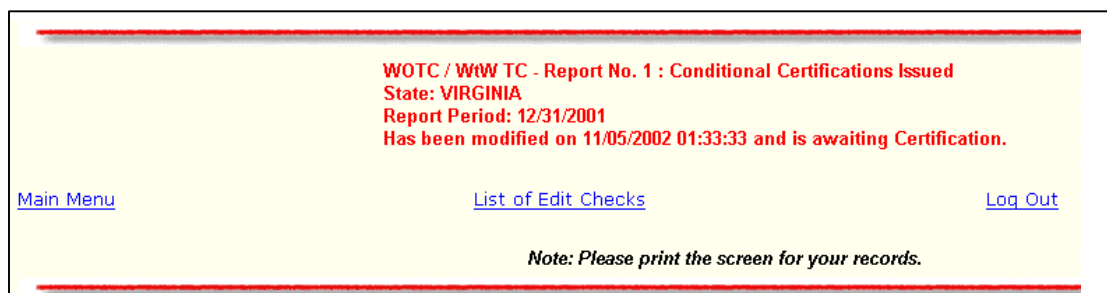
Figure 8: Report No. 1 Save Confirmation Message

Submit and Save with a PIN: Type the **PIN** in the designated field at the bottom of the report. Click **Submit**. A confirmation message is displayed (Figure 9). It provides the name of the state, report period, and date that the report was submitted. Click the **Print** icon from the browser menu bar to print a copy of the message window. Click the **Back** button on the browser menu bar to return to the report. Otherwise, you may click **Main Menu** to return to the **WOTC/WtW Tax Credit Reports Selection** (main menu) window or click **Log Out** to return to the **WOTC/WtWTC ETA Grantee Reporting System Login**.

WOTC / WtW TC - Report No. 1 : Conditional Certifications Issued
State: VIRGINIA
Report Period: 09/30/2002
Has been successfully submitted on 11/05/2002 01:38:06
And is now Certified

Main Menu   List of Edit Checks   Log Out

Note: Please print the screen for your records.
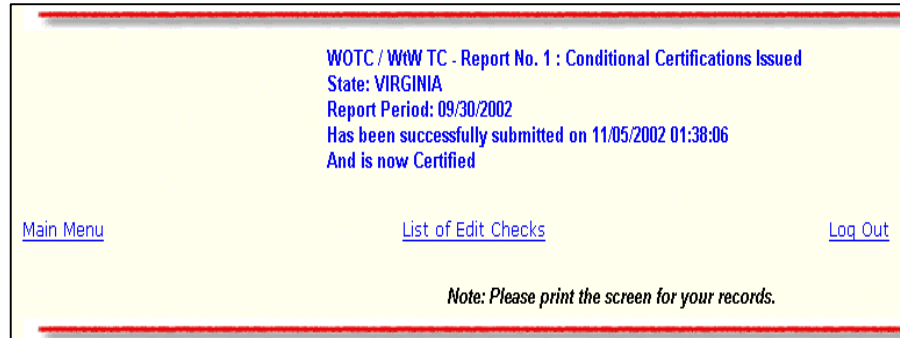
Figure 9: Report No. 1 Submit Confirmation Message

3.   After you type all the report data, print a copy of the report to review for accuracy and to retain for your records.

4.   **To print the report:** Click the **Print** button at the bottom of the report window. The **Adobe** report window is opened with the report displayed. Continue by clicking the print icon on the **Adobe** tool bar. The **Print** window is displayed. Click **OK** to print the report at the printer designated by your PC. A sample copy of the report is attached to this document in **Appendix A.**

To return to the **WOTC/WtWTC** report window, click the **back arrow** on the tool bar at the top of the window.

Certifications, Workload and Characteristics of Certified Individuals - Report No. 2

Accessing Certification Workload and Characteristics of Certified Individuals

Follow the steps below to access the **Certification Workload and Characteristics of Certified Individuals (Report 2)** program. The data can be saved without a PIN or saved and submitted with a PIN. Detailed **field** instructions are provided online. Also, a copy of the report can be printed for your records.

Note: You can choose to enter data to the report by the Dictionary of Occupational Titles (**DOT**) code that includes Part II, sections I, J, and K **or** the report by Occupation Information Network (**O*NET**) code that includes Part II, section I, J, and L. If you enter the **DOT** report and decide, later, to enter the **O*NET** report for the same quarter, the system notifies you that you already entered data to Section K (the **DOT** report) and asks whether you now wish to continue to enter data to the **(O*NET)** report. If you choose to continue and enter data to the **O*NET** report, the system automatically deletes any data in the **K** (DOT) section of the previous **DOT** report. This delete only occurs when you choose to **save** or **submit** the **O*NET** report. The reverse action is also possible (e.g., from **O*NET** report to **DOT** report). However, states must move to **O*NET** reporting to comply with the Labor Exchange Reporting requirements.

1. Access the **WOTC/WtW Tax Credit Reports Selection (main menu)** window (see Figure 3)

2. Click the arrow at the end of the **WOTC/WtWTC Reports** field and select **Certification Workload and Characteristics of Certified Individuals**. The **Choose Quarter End Date** (for WOTC Report No. 2) window is displayed (Figure 10).

Figure 10: Choose Quarter End Date Window

3. Click the arrow at the end of the **Quarter End Date** field and select the desired quarter ending date from the list.

4. Next, click **Continue**. The **WOTC/WtWTC Choose An Occupation Code** window (Figure 11) is displayed. Instructions for entering each report are provided in the following sub-sections.

WOTC/WtW Tax Credits Reporting System

Please Choose an Occupation Code:

⦿ By Occupation (DOT)
◯ By Occupation (O*NET)

[Continue]

Main Menu   List of Edit Checks   Log out

Figure 11: Choose Occupation Code Window

Entering Certification Workload and Characteristics of Certified Individuals (Report No. 2) for Occupation Code - DOT

1. Click **By Occupation (DOT)** and click **Continue** to access this report. The report is displayed (Figure 12).

2. Type the report data in the appropriate fields. Only numeric values may be entered. No decimals or minus numbers are allowed (e.g., 4**.**5 or **-**25). The numbers are automatically formatted by the system (e.g., commas are system-generated). The maximum number of digits that can be entered is 8. If there is no data for a field, a zero must be entered. Press the **Tab** key to move from field to field. **Total** fields are cumulative and system-generated. You cannot enter data to these fields. The **Name and Title of Responsible Official** fields and the **Date Certified** field are also system-generated, based on user log-in information. These fields cannot be modified.

Note: Detailed field instructions can be viewed online by clicking any underlined field title (e.g., Total for Quarter). To return to the form from the online instructions, click the underlined title within the instructions.

Certification Workload and Characteristics of Certified Individuals
Work Opportunity and Welfare-to-Work Tax Credits
(Report No. 2)

Work Opportunity and Welfare-to-Work Tax Credits Report 2 for 12/31/2001
Was State Certified as of 10/23/2002 02:48:26

| State: TN | Quarter Ending: 12/31/2001 | Persons are not required to respond to this collection of information unless it displays a currently valid OMB control number. Respondents' obligation to reply to these reporting requirements are mandatory (P.L. 104-188). Public reporting burden for this collection of information is estimated to average 8 hours per response. including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to the U.S. Department of Labor, U.S. Employment Service, Room C-4514, Washington, D.C. 20210 (Paperwork Reduction Project 1205-0371) | OMB Approval No.12055-0371 Expiration:MMDDYY |

Part I. CERTIFICATION WORKLOAD

Certification Requests (System Inputs)				Certification Action (System Outputs)			
(A) No.of Requests Incomplete	(B) No.of Requests Needing Action	(C) New Requests	(D) Total Requests to be Processed	(E) Requests Certified	(F) Requests Denied	(G) No.of Requests Incomplete	(H) No.of Requests Needing Action
61	7	10	78	4	4	5	65

Part II. CHARACTERISTICS OF CERTIFIED INDIVIDUALS BY TAX CREDIT

(I) By WOTC Target or Long-Term IV-A Recipient Group	(a) No. of Conditional Certs Resulting in Certifications	No. of Certified Individual (b) WOTC	No. of Certified Individual (c) WtW only	No. of Certified Individual (d) Dual	(J) By Hourly Starting Wage	No. of Certified Individuals (a) WOTC	No. of Certified Individuals (b) WtW (including Duals)	(K) By Occupation (DOT)	No. of Certified Individuals (a) WOTC	No. of Certified Individuals (b) WtW (including Duals)
1. IV-A Recipient	2	4		5	12. Under Federal	4	5	19. Professional	4	5
2. Veteran	0	0		0	13. $5.15-$5.99	0	0	20. Clerical	0	0
3. Ex-Felon	0	0		0	14. $6.00-$6.99	0	0	21. Service	0	0
4. High Risk Youth	0	0		0	15. $7.00-$7.99	0	0	22. Farms	0	0
5. Voc. Rehab Ref	0	0		0	16. $8.00-$8.99	0	0	23. Processing	0	0
6. Summer Youth	0	0		0	17. $9.00 and more	0	0	24. Machine Trade	0	0
7. Food Stamp Rec	0	0		0	18. Total (for quarter)	4	5	25. Bench Work	0	0
8. SSI Recipient	0	0		0				26. Structural	0	0
9. Long Term IV-	0		0					27. Misc	0	0
10. Total (for quarter)	2	4	0	5				28. Total (for quarter)	4	5
11. Total (ytd)	2	4	0	5						

Name of Responsible Official:	Title of Responsible Official:	
Roger Littlejohn	Supervisor	Date Certified: 10/23/2002

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Please press the Save button to save: [Save]

Please enter your pin number to submit: [____] [Submit]

Please press the print button to print: [Print]

Main Menu   List of Edit Checks   Log out

Figure 12: Certification Workload WtWTC and Characteristics of Certified Individuals – WOTC Report No. 2
By Occupation (DOT)

3. When you are ready to save the report, you can **save (only)** without a PIN or **save and submit** with a PIN.

Save Only (without a PIN): Click **Save**. A message is displayed (Figure 13) to remind you that the report is saved, but not submitted. Click **OK**. The confirmation message is displayed (Figure 14). It provides the state, period, and date that the report was saved/modified. Click the print icon from the browser menu bar to print a copy of the message window. Click the **Back** button on the browser menu bar to return to the report. Otherwise, you may click **Main Menu** to return to the **WOTC/WtW Tax Credit Reports Selection** (main menu) window or click **Log Out** to return to the **ETA Grantee Reporting System Login** window.
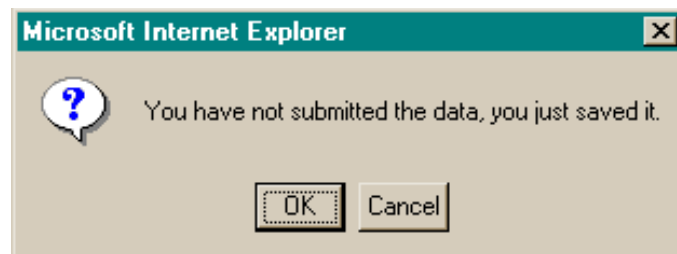
Figure 13: Choose Quarter End Date Window
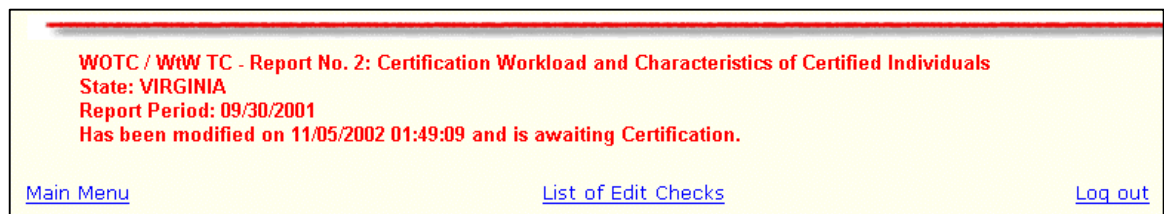
Figure 14: Report No. 2 - Save Confirmation Message

Submit and Save with a PIN: Type the **PIN** in the designated field at the bottom of the report. Click **Submit**. A confirmation message is displayed (Figure 15). It provides the state, period, and date that the report was submitted. Click the print icon from the browser menu bar to print a copy of the message window. Click the **Back** button on the browser menu bar to return to the report. Otherwise, you may click **Main Menu** to return to the **WOTC/WtW Tax Credit Reports Selection** (main menu) window or click **Log Out** to return to the **ETA Grantee Reporting System Login**.


WOTC / WtW TC - Report No. 2: Certification Workload and Characteristics of Certified Individuals
State: VIRGINIA
Report Period: 09/30/2001
Has been successfully submitted on 11/05/2002 01:49:41
And is now Submitted.

Main Menu   List of Edit Checks   Log out
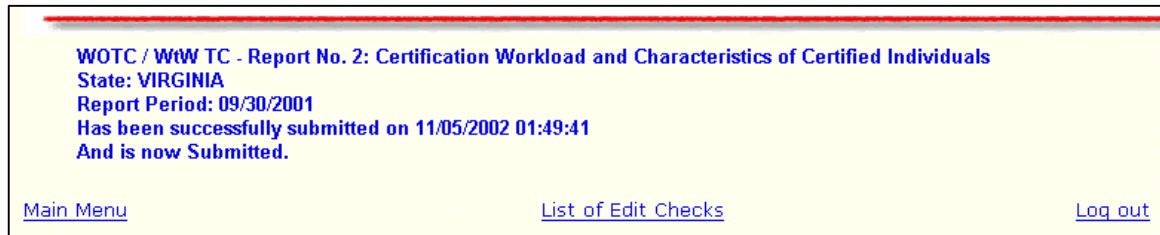
Figure 15: Report No. 2 - Submit Confirmation Message

4. After you type all the report data, print a copy of the report to review for accuracy and to retain for your records.

5. **To print the report:** Click the **Print** button at the bottom of the report window. The **Adobe** report window is opened with the report displayed. Continue by clicking the print icon on the **Adobe** tool bar. The **Print** window is displayed. Click **OK** to print the report at the printer designated by your PC. A sample copy of the report is attached to this document in **Appendix A.**

To return to the **WOTC/WtWTC** report window, click the **back arrow** on the tool bar at the top of the window.

Entering Certification Workload and Characteristics of Certified Individuals (Report No. 2) for Occupation Code – O*NET

1. Click **By Occupation (O*NET)** and click **Continue** to access this report.   The report is displayed (Figure 17).

2. If data was already saved or submitted in the **DOT** report (with Section K), the following message window is displayed (Figure 16), prompting you to indicate that you want to change to **O*NET** (Section L). To continue, click **OK**. **Note:** If you continue to the **O*NET** report with Section L and save or submit data in the report, the previous data entered in Section K of the **DOT** report is automatically deleted by the system. The same process is followed for the reverse situation (changing from the **O*NET** report, Section L to the **DOT** report, Section K). However, states must move to O*NET reporting to comply with the Labor Exchange Reporting requirements.
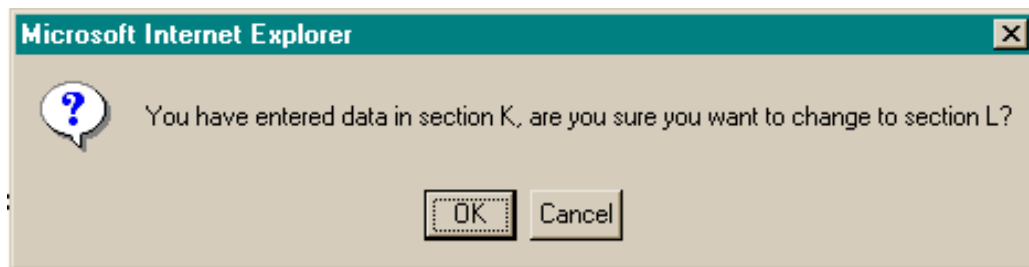

Figure 16: Prompt to Continue from Report with Section K
to Report with Section L Message Window

Certification Workload and Characteristics of Certified Individuals
Work Opportunity and Welfare-to-Work Tax Credits
(Report No. 2)

Work Opportunity and Welfare-to-Work Tax Credits Report 2 for 12/31/2001
Was State Certified as of 10/23/2002 02:48:26

State:	Quarter Ending:	Persons are not required to respond to this collection of information unless it displays a currently valid OMB control number. Respondents' obligation to reply to these reporting requirements are mandatory (P.L. 104-188). Public reporting burden for this collection of information is estimated to average 8 hours per response. including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to the U.S. Department of Labor, U.S. Employment Service, Room C-4514, Washington, D.C. 20210 (Paperwork Reduction Project 1205-0371)	OMB Approval No.1205-0371 Expiration:MMDDYY
TN	12/31/2001		

Part I. CERTIFICATION WORKLOAD

Certification Requests (System Inputs)				Certification Action (System Outputs)			
(A) No. of Requests Incomplete	(B) No.of Requests Needing Action	(C) New Requests	(D) Total Requests to be Processed	(E) Requests Certified	(F) Requests Denied	(G) No. of Requests Incomplete	(H) No. of Requests Needing Action
61	7	10	78	4	4	5	65

Part II. CHARACTERISTICS OF CERTIFIED INDIVIDUALS BY TAX CREDIT

(I) By WOTC Target or Long-Term IV-A Recipient Group	(a) No. of Conditional Certs Resulting in Certifications	No. of Certified Individual			(J) By Hourly Starting Wage	No. of Certified Individuals	
		(b) WOTC	(c) WtW only	(d) Dual		(a) WOTC	(b) WtW (including Duals)
1. IV-A Recipient	2	4		5	12. Under Federal	4	5
2. Veteran	0	0		0	13. $5.15-$5.99	0	0
3. Ex-Felon	0	0		0	14. $6.00-$6.99	0	0
4. High Risk Youth	0	0		0	15. $7.00-$7.99	0	0
5. Voc. Rehab Ref	0	0		0	16. $8.00-$8.99	0	0
6. Summer Youth	0	0		0	17. $9.00 and more	0	0
7. Food Stamp Rec	0	0		0	18. Total (for quarter)	4	5
8. SSI Recipient	0	0		0			
9. Long Term IV-	0		0				
10. Total (for quarter)	2	4	0	5			
11. Total (ytd)	2	4	0	5			

(L) By Occupation (O*NET)	Code	No. of Certified Individual		Cont., (L) By Occupation (O*NET)	Code	No. of Certified individuals	
		(a) WOTC	(b) WtW (including Duals)			(a) WOTC	(b) WtW (including Duals)
19. Management	11	0	0	31. Food Preparation & Serving Related	35	0	0
20. Business & Financial Operation	13	0	0	32. Bldg., & Grounds Cleaning & Maintenance	37	0	0
21. Computer & Mathematical	15	0	0	33. Personal care & Services	39	0	0
22. Architecture & Engineering	17	0	0	34. Sales & Related Occupations	41	0	0
23. Life, Physical & Social Sciences	19	0	0	35. Office & Administrative Support	43	0	0
24. Community & Social Services	21	0	0	36. Farming, Fishing & Forestry	45	0	0
25. Legal	23	0	0	37. Construction & Extraction	47	0	0
26. Education, Training & Library	25	0	0	38. Installation, Maintenance & Repair	49	0	0
27. Arts, Design, Enterainment Sports & Media	27	0	0	39. Production	51	0	0
28. Healthcare Practitioners	29	0	0	40. Transportation & Material Moving	53	0	0
29. Healthcare Support	31	0	0	41. Military Specific	55	0	0
30. Protective Services	33	0	0	42. Total (for Quarter)		0	0

Name of Responsible Office:	Title of Responsible Official:	Date Certified: 10/23/2002
Roger Littlejohn	Supervisor	

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Please press the Save button to save: **Save**

Please enter your pin number to submit: **Submit**

Please press the print button to print: **Print**

Main Menu   List of Edit Checks   Log out

Figure 17: Certification Workload WtWTC and Characteristics of Certified Individuals – WOTC Report No. 2 **By Occupation (O*NET)**

3.   Type the report data in the appropriate fields. Only numerical digits may be entered. No decimals or minus numbers are allowed (e.g., 4**.**5 or **-**25). The numbers are automatically formatted by the system (e.g., commas are system-generated). The maximum number of digits that can be entered is 8. If there is no data for a field, a zero must be entered. Press the **Tab** key to move from field to field. **Total** fields are cumulative and system-generated. You cannot enter data to these fields. The **Name and Title of Responsible Officia**l fields and the **Date Certified** field are also system-generated based on log-in information. These fields cannot be modified.

       Note: Detailed field instructions can be viewed online by clicking any underlined field title (e.g., <u>Total for Quarter</u>). To return to the form from the online instructions, click the underlined title within the instructions.

4.   When you are ready to save the report, you can **save (only)** without a PIN or **save and submit** with a PIN.

       Save Only (without a PIN): Click **Save**. A message is displayed (Figure 12) to remind you that the report is saved, but not submitted. Click **OK**. The confirmation message is displayed (Figure 13). It provides the state, period, and date that the report was saved/modified. Click the print icon from the browser menu bar to print a copy of the message window. Click the **Back** button on the browser menu bar to return to the report. Otherwise, you may click **Main Menu** to return to the **WOTC/WtW Tax Credit Reports Selection** (main menu) window or click **Log Out** to return to the **ETA Grantee Reporting System Login** window.

       Submit and Save with a PIN: Type the **PIN** in the designated field at the bottom of the report. Click **Submit**. A confirmation message is displayed (Figure 14). It provides the name of the state, report period, and date that the report was submitted. Click the print icon from the browser menu bar to print a copy of the message window. Click the **Back** button on the browser menu bar to return to the report. Otherwise, you may click **Main Menu** to return to the **WOTC/WtW Tax Credit Reports Selection** (main menu) window or click **Log Out** to return to the **ETA Grantee Reporting System Login**.

5.   After you type all the report data, print a copy of the report to review for accuracy and to retain for your records.

6.   **To print the report:** Click the **Print** button at the bottom of the report window. The **Adobe** report window is opened with the report displayed. Continue by clicking the print icon on the **Adobe** tool bar. The **Print** window is displayed. Click **OK** to print the report at the printer designated by your PC.
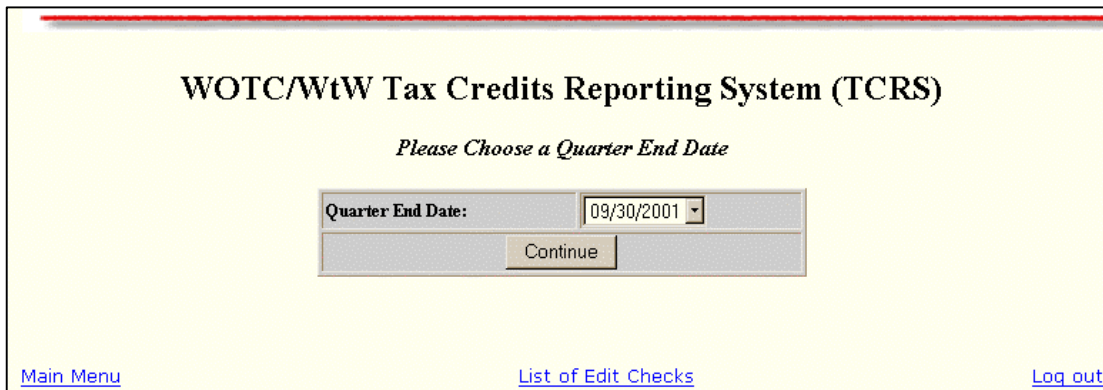
       To return to the **WOTC/WtWTC** report window, click the **back arrow** on the tool bar at the top of the window. A sample copy of the report is attached to this document in **Appendix A.**

Verification Results

Accessing Verification Results (WOTC/WtWTC Report No. 3)

Follow the steps below to access the **Verification Results Report**. You can enter or update data in the report form. The data can be saved without a PIN or saved and submitted with a PIN. Detailed **field** instructions are provided online. Also, a copy of the report can be printed for your records.

1. Access the **WOTC/WtW Tax Credit Reports Selection** window (Figure 3).

2. Click the arrow at the end of the **WOTC/WTW Reports** field and select **Verification Results**. The **Choose Quarter End Date** (for WOTC/WtWTC Report No. 3) window is displayed (see Figure 18).

Figure18: Choose Quarter End Date Window

3. Click the arrow at the end of the **Quarter End Date** field and select the desired quarter ending date from the list.

4. Next, click **Continue**. The **WOTC/WtWTC Verification Results/Report No. 3** is displayed (Figure 19).

Figure 19: WOTC/WTWTC Verification Results (Report No. 3)

Entering WOTC/WtWTC Verification Results (Report No. 3)

1. Type the report data in the appropriate fields. Only numeric values may be entered. No decimals or minus numbers are allowed (e.g., 4**.**5 or **-**25). The numbers are automatically formatted by the system (e.g., commas are system-generated). The maximum number of digits that can be entered is 10. You cannot enter data to fields that are system-generated. The following fields are system-generated: **A1**, **A4**, **A6** and **B7**, **B10**, **B11**. The **Comments** field accepts any character. Press the **Tab** key to move from field to field.

Note: Detailed field instructions can be viewed online by clicking any underlined field title (e.g., Sample Size). To return to the form from the online instructions, click the underlined title in the instructions.

2. When you are ready to save the report, you can **save (only)** without a PIN or **submit and save** with a PIN.

Save Only (without a PIN): Click **Save**. A message is displayed (Figure 20) to remind you that the report is saved, but not submitted. Click **OK**. The confirmation message is displayed (Figure 21). It provides the state, period, and date that the report was saved/modified. Click the print icon from the browser menu bar to print a copy of the message window. Click the **Back** button on the browser menu bar to return to the report. Otherwise, you may click **Main Menu** to return to the **WOTC/WtW Tax Credit Reports Selection** (main menu) window or click **Log Out** to return to the **ETA Grantee Reporting System Login** window.
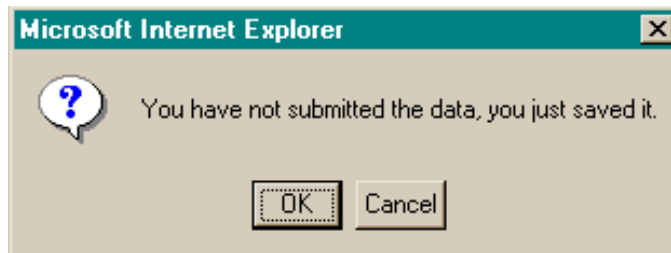
Figure 20: Save Only Notification
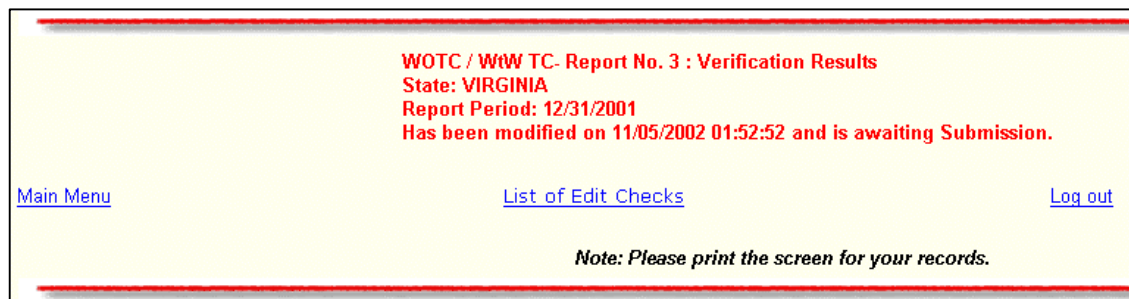
Figure 21: Report No. 3 - Save Confirmation Message

Submit and Save with a PIN: Type the **PIN** in the designated field at the bottom of the report. Click **Submit**. A confirmation message is displayed (Figure 22). It provides the name of the state, report period, and date that the report was submitted. Click the print icon from the browser menu bar to print a copy of the message window. Click the **Back** button on the browser menu bar to return to the report. Otherwise, you may click **Main Menu** to return to the **WOTC/WtW Tax Credit Reports Selection** (main menu) window or click **Log Out** to return to the **ETA Grantee Reporting System Login**.


WOTC and WtW TC- Report No. 3 for
State: DISTRICT OF COLUMBIA
Period: 12/31/2001
is submitted on: 10/17/2002 successfully.

Main Menu   Log out

Note: Please print the screen for your records.
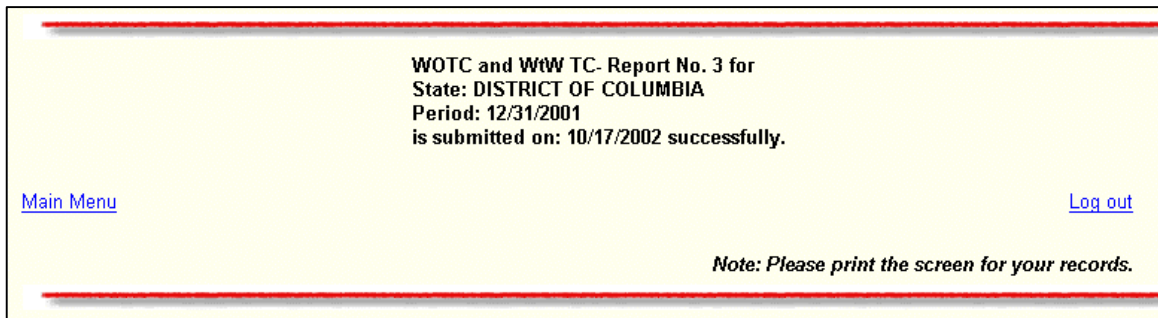
Figure 22: Report No. 3 - Submit Confirmation Message

3.   After you type all the report data, print a copy of the report to review for accuracy and to retain for your records.

4.   **To print the report:** Click the **Print** button at the bottom of the report window. The **Adobe** report window is opened with the report displayed. Continue by clicking the print icon on the **Adobe** tool bar. The **Print** window is displayed. Click **OK** to print the report at the printer designated by your PC.

To return to the **WOTC/WtWTC** report window, click the **back arrow** on the tool bar at the top of the window. A sample copy of the report is attached to this document in **Appendix A.**

Appendix A

Tax Credits Reporting System Edit Checks
Back

	Type of Field	Edit Check	Edit Check Message
Report 1 – Conditional Certifications Issued			
I. By Issuing Agency			
9. Total (for quarter)	Read Only – Automatic Calculation	$\sum(1..8)$	
II. By WOTC Target			
20. Total (for quarter)	Read Only – Automatic Calculation	$\sum(11..19)$	
Report 2 – Certification Workload			
Part I. Certification Workload			
A. No. of Requests Incomplete	Read Only – Automatic Calculation, except for 1st quarter (9/30)	Item G from previous quarter's report.	
B. No. of Requests Needing Action	Read Only – Automatic Calculation, except for 1st quarter (9/30)	Item H from previous quarter's report.	
C. New Requests	Data Entry		
D. Total Requests to be Processed	Read Only – Automatic Calculation	$D = A+B+C$	
E. Requests Certified	Data Entry	$E = 10b + 10c$ (Part II)	
F. Requests Denied	Data Entry		

	Type of Field	Edit Check	Edit Check Message
G. No. of Requests Incomplete	Data Entry		
H. No. of Requests Needing Action	Read Only – Automatic Calculation	D-E-F-G	
Part II – Section I			
10a. Total (for quarter) – No. Cond. Certs Resulting in Certifications	Read Only – Automatic Calculation	$\sum(1a..9a)$	
10b. Total (for quarter) – WOTC	Read Only – Automatic Calculation	$\sum(1b..8b)$	
10c. Total (for quarter) – WtW only	Read Only – Automatic Calculation	10c = 9c	
10d. Total (for quarter) – Dual	Read Only – Automatic Calculation	$\sum(1d..8d)$	
Part II – Section J			
18a. Total (for quarter)	Read Only – Automatic Calculation	$\sum(12a..17a)$; also 18a = 10b	Section J, Column (a) Line #18 is the sum of the column and must equal the total for Section I, Column (b) Line #10
18b. Total (for quarter)	Read Only – Automatic Calculation	$\sum(12b..17b)$; also 18b = 10c+10d	Section J, Column (b) Line #18 is the sum of the column and must equal the total for Section I, Column (c) and (d) Line #10.
Part II – Section K – By Occupation (DOT)			
28a. Total (for quarter) – WOTC	Read Only – Automatic Calculation	$\sum(19a..27a)$; also 28a = 10b	Section K, Column (a) Line #28 is the sum of the column and must equal the total for Section I, Column (b) Line #10
28b. Total (for	Read Only –	$\sum(19b..27b)$; also	Section K, Column

	Type of Field	Edit Check	Edit Check Message
quarter) – WtW, including Duals	Automatic Calculation	28b = 10c+10d	(b) Line #28 is the sum of the column and must equal the total for Section I, Column (c) and (d) Line #10.
Part II – Section L – By Occupation (O*NET)			
42a. Total (for quarter) – WOTC	Read Only – Automatic Calculation	$\sum$(19a..41a); also 42a = 10b	Section L, Column (a) Line #42 is the sum of the column and must equal the total for Section I, Column (b) Line #10
42b. Total (for quarter) – WtW, including Duals	Read Only – Automatic Calculation	$\sum$(19b..41b); also 42b = 10c+10d	Section L, Column (b) Line #24 is the sum of the column and must equal the total for Section I, Column (c) and (d) Line #10.
Report 3 – Verification Results			
A. Certifications Issued			
1. Universe Size	Read Only – Automatic Calculation	A1 = D (from Report No. 2)	
2. Sample Size	Data Entry	A2 >= sample size in Handbook (page v-53)	
3. Number Invalid	Data Entry		
4. Percent Invalid	Read Only – Automatic Calculation	A4 = (A3/A2) * 100; If A4 < 5%, do not complete lines A5 and A6. If A4 >= 5%, second sample required	Line no.4 is not 5 percent or greater. Please skip Line Nos. 5 & 6
5. Number Invalid – 2nd Sample	Data Entry		
6. Percent Invalid – 2nd Sample	Read Only – Automatic Calculation	A6 = (A5/A2) * 100; If A6 >= 5%, corrective action shall be initiated	

	Type of Field	Edit Check	Edit Check Message
B. Economic Determinations			
7. Universe Size	Read Only – Automatic Calculation	B7 = I.3b (from Report No. 2)	
8. Sample Size	Data Entry	B8 >= sample size in Handbook (page vii-24)	
9. Number Invalid	Data Entry		
10. Percent Invalid	Read Only – Automatic Calculation	B10 = (B9/B8) * 100; If B10 < 5%, do not complete lines B11 and B12. If B10 >=5%, second sample required	Line no.10 is not 5 percent or greater. Please skip Line Nos. 11 & 12
11. Percent Invalid – 2nd Sample	Read Only – Automatic Calculation	B11 = (B12/B8) * 100; If B11 >=5%, corrective action shall be initiated	
12. Number Invalid – 2nd Sample	Data Entry		