

# Texas Workforce Commission Work Opportunity Tax Credit Conditional Certificate User Manual

### Contents

Texas Workforce Commission1
Work Opportunity Tax Credit1
Conditional Certificate User Manual1
Important Notes:
Requesting Access 2
Logging into the Appian System4
Application Status Codes
Entering Conditional Certificate Requests
Qualified Veteran Target Group7
<b>Ex-Felon</b>
Vocational Rehabilitation7
Documents
Acceptable Support Documents8
1 rev 4/2025

### **Important Notes:**

- By uploading the documents into the portal, you no will no longer have to maintain a copy for retention purposes.
  - All documents must be submitted as a single attachment.
- Once the conditional certificate is saved, it will go to "in process" status.
- A member of the Work Opportunity Tax Credit (WOTC) team will review to make sure the information is accurate and then approve or deny the certification request.
- If approved, the job seeker will be sent the conditional certificate and supporting documents.
- If denied, the WOTC team will reach out to you.
- The system is secure for storage of documents. Please do not upload documents with redacted social security numbers (SSNs). The system uses the SSN as a match for application processing, so we need to verify the SSN is accurate.

### **Requesting Access**

Texas Veteran's Commission (TVC) staff, submit your access request through your area points of contact (POCs):

- Theresa Griffard
- Willie Cooper
- Gary Wilson
- Lisa Jeanne Simpson
- Jessica Buerger
- Mark Renninger
- David Dohme
- Kevin Bowes

Texas Veteran's Leadership Program, submit your request through Bob Gear.

Workforce Solutions Offices, submit your request through your manager.

An email request from your supervisor should include:

- your first and last name;
- full TVC email address; and
- work phone number.

Once the request is received by TWC's WOTC unit, we will issue you access. You will receive an email with your activation link from <a href="mailto:noreply@okta.com">noreply@okta.com</a>. Select the link and follow the prompts to set up your password.

## Logging into the Appian System

- Use the following link: <u>twcgov Sign In</u>.
- Your email address will be your username.
  - For twc.texas.gov email addresses, you will be able to access
    WorkInTexas.com (WIT) and WOTC through the same username.
  - For all other email addresses, you will need to use your email address to access WOTC, and your WIT username will be your local workforce development area (LWDA) number followed by your first initial and last name.

Note: If you have two usernames and want to access both WIT and WOTC at the same time, you will need to use two different browsers since you have unique usernames for each account.

No.	
Sign In	
Username	
russell.hunter@twc.texas.gov	
Keep me signed in	
Next	
Unlock account?	
Help	

Enter your username and the password you created.

You will be taken to the following screen:

News Tasks (6) Reco	ds Reports Actions	III 🕅 🖬
0	Click here to post	
Search news Q	No entries available	
All > Updates Participating Kudos ¥ Starred <b>*</b>		

In the top-right corner, you will see a "waffle" or grid icon.



Click on the "waffle" and select WOTC.



You will be taken to the following screen:



If you click on Cond-Certs on the main page, you should see any conditional certificates you have requested.

### **Application Status Codes**

- Approved The conditional certificate request was approved.
- Revoked A previously approved conditional certificate has been revoked and is no longer valid.
- In Process The conditional certificate request is pending review by a WOTC analyst.
- Denied The conditional certificate request was denied. You will receive an email detailing the reason for the denial.

### **Entering Conditional Certificate Requests**

To enter a new conditional certificate, select "New Cond-Cert" in the quick actions.

The following fields are required.

- Date Completed This will default to the date you are entering the request.
- LWDA Select your local LWDA from the drop-down menu. If you are with a state office, use LWDA code 99.
- Agency Code Select appropriate agency code from the drop-down menu.
- When you select the agency code, it will fill in the appropriate agency.
- First Name Do not use any special characters.
- Last Name Do not use any special characters.
- SSN no dashes
- Address numbers and letters only, no special characters
- City no special characters
- State Defaults to Texas, change as needed.

- Zip Five-digit ZIP Code
- Phone full nine digits
- Email Required. Job seeker will receive an email with the conditional certificate and supporting documents.
- Target Group Select the target group (TG) for the conditional certificate. This will open the detail pain for the corresponding TG.

#### **Qualified Veteran Target Group**

- Military Branch Select from the drop-down menu.
- Service Entry Date required
- Service Release Date required
  Note: For veterans, remember there must be a total of 180 days active-duty service. If there are less than 180 days, the certificate should be denied. If the DD214 shows prior active duty, request any other DD214s through the comments.
- DD214 on File required
- Rating Letter on File Check yes if you have received a rating letter from the veteran.
- Disabled Veteran optional
- \*Disabled Veteran Unemployed 6 months leave blank
- \*Veteran Unemployed 4 weeks but less than 6 months leave blank
- \*Veteran Unemployed 6 Months leave blank

**Note:** Unemployed fields (\*) should not be completed since circumstances may change from when you are entering the information to the time they start a new job. WOTC staff will verify unemployment status when an application is submitted from a hiring employer.

#### **Ex-Felon**

- Conviction Date if you have it available
- Release Date required
- Court/Discharge Doc on File required
- Corrections ID Number Enter the Texas Department of Criminal Justice (TDCJ) number or Bureau of Prisons (BOP) number.
- Conviction Type Select Federal or State from the drop-down menu.

#### **Vocational Rehabilitation**

- Application Date if available
- Closed Date if available
- Last Service Date if available
- IPE on file required

**Note:** At least one date must be populated for the Vocational Rehabilitation (VR) section.

#### **Documents**

- You **must** upload the appropriate documents for the target group you have selected.
- Before a request is approved, you can remove an attachment and update it with a new file using the "update conditional Cert" button in the top-right corner of the application.
  - You will see, "Would you like to update this file and upload new one" at the bottom of the page.
  - Click yes to remove the current document.
  - Upload the new document.

#### **Acceptable Support Documents**

- 1. Age Driver's license, birth certificate, school identification (ID) card, work permit, or any federal/state/local government ID if it contains the DOB
- 2. Address Driver's license, work permit, W-4 forms, or any federal/state/local government ID
- 3. Veteran DD214, Reserve unit contacts, Servicemembers Civil Relief Act (SCRA) notices, Bureau of Naval Personnel forms, and letters from the National Personnel Records Center
- 4. Disabled Veteran Rating letters and VA combo letters
- 5. Ex-Felon The following documents can be uploaded to support Ex-Felon status:
  - a. Court records, correctional institution records
  - b. BOP or TDCJ registry numbers
  - c. Letters from parole agents (on letterhead)
- 6. VR The following documents can be uploaded to support VR status:
  - a. VR agency contact
  - b. Veterans Administration for Disabled Veterans
  - c. Signed letter of separation or related document from authorized individual on Department of Veterans Affairs (DVA) letterhead or agency stamp with specific description of months benefits were received
  - d. Individual Plan of Employment (IPE)
    - Note: Documents for the VR TG must have one of the following dates:
      - 1. Application Date
      - 2. IPE Open Date
      - 3. Last Service Date
      - 4. IPE Closed Date

Select Save Cond-Cert.