

Work Opportunity Tax Credit Online System Portal

Bulk Upload Desk Aid

To facilitate the successful submission of Work Opportunity Tax Credit (WOTC) out-of-state (OOS) verification of enrollment (VOE) requests into the WOTC Online System (OLS), follow these guidelines.

Once you are signed into the system, you will select **New VOE Request**.

There will be two options:

- Submit a New OOS VOE Request as a single entry.
- Submit an OOS Bulk File, using the Excel-to-CSV template provided.

1. Submit a Single New OOS VOE Request – Enter Data Manually

Procedures

When selected, an OOS VOE request screen will be displayed. There are six required fields to be completed (**asterisk fields are required**).

- **State** – The two-digit State abbreviation will populate.
- **OOS Claim/Case Number** – If your state uses a claim number assignment, you can enter that claim/case number for quick reference.
- **SSN** – Enter the applicant social security number (SSN). You do not need to enter dashes or hyphens, just numbers.
- **Postmark** – This will default to the current date.
- **Hired Date** – Enter the hire date from the IRS Form 8850.
- **First Name** – Enter the applicant's first name (no special characters, periods, commas, hyphens, apostrophes, and so on).
- **Last Name** – Enter the applicant's last name (no special characters, periods, commas, hyphens, apostrophes, and so on).
- **DOB** – If available, enter the applicant's date of birth (DOB) as mm/dd/yyyy.

After entering the applicant information, you can select a specific target group (TG) for Texas to verify eligibility. Texas will **always** pursue any applicable TG based on the applicant eligibility that is provided. All applications are checked for Long Term Family Assistance Recipients (LTFAR) regardless of what TG may be indicated. Texas will **only** be able to provide wage and/or unemployment insurance (UI) benefit info for Veterans Opportunity to Work (VOW) TGs. We cannot verify DD214 status.

Once you have selected any TGs, select **SUBMIT**. If you receive error messages, they must be corrected before the application can be accepted. A confirmation email will be sent containing the Texas assigned **OOS VOE request number**.

2. Submit an OOS Bulk File (Bulk upload [BU] file creation instructions follow).

- Select the **Submit an OOS Bulk File** button.
- Select the **UPLOAD** button.

- Locate the CSV file to upload and double-click on it.
- Once the **blue circle** is complete, the **Postmark Date** field will reflect the current date.
 - The postmark date is not editable.
- Select the **NEXT** button.
 - There is a very thin blue line progress bar that is located just above the **MENU** line.
 - The **NEXT** button will also show progress, as it will remain dim while the file is processing.
- When results are displayed, two sections will be displayed, **Incomplete Applications** and **Complete Applications**.
 - **Incomplete Applications will appear in the red section with a count.**
 - ✓ Click **GENERATE EXCEL FILE** at the bottom of the incomplete section. This will gather all files if multiple pages exist.
 - ✓ When the file is ready, select **Download Incomplete Applications**.
 - ✓ The file will download for your review.
 - ✓ This action must be completed before you select the **SUBMIT** button.
 - **Complete Applications will appear in the green section with a total count.**
- Once the incomplete application Excel report has been downloaded, scroll down to the **Electronic Agreement** section and check **both** boxes to acknowledge and accept Applicant and Employer jurat statements.
 - You cannot upload until both boxes are not selected.
- Select **SUBMIT**. You will see **ACTION COMPLETED** and will be taken back to the main menu.
- Once the file has uploaded and processed, the **confirmation email** will be sent and will provide the claim number range.

Creating the Work Opportunity Tax Credit Online System Out-of-State Bulk Upload File

Always create the OOS VOE BU file by using the attached Excel template as the first tab in the workbook.

Important information:

- The Excel/CSV files are **original** and must be retained **as submitted**. These files are the Certificate of Electronic Filing (**COEFile**).
- When ready to upload, the file **must** be uploaded as a CSV file.
 - **Do not** use the **CSV UTF-8 (comma delimited) (*.csv)** option.
- Once converted to CSV, you may notice a cell format change from Text to General. If each cell in columns A, B, C, and L indicates Text formatting in

Excel prior to converting to CSV, there should not be any issues uploading the file.

- **Do not** alter the template by creating drop-down options, borders, shaded areas, and so on.
- **Do not** use commas in any field. Commas are separators in CSV files and will alter the upload.
- Upload files are limited to 999 records, including the header row. Our new system processes bulk file records in groups of 200 to avoid slow response times.

Instructions:

- The **header row is required** for all CSV upload files.
- **Column A is Required** – Enter the two-digit state abbreviation.
- Column B is available for your assigned 8850 claim/case number, if applicable.
- **Column C is required** and is formatted as Text to allow for leading zeros. **Do not** alter format of column. Enter the nine-digit SSN with no dashes or hyphens. Each cell in column C will have a green triangle in the upper-left corner of the cell indicating Text format.
- Column D is DOB. If available and if possible, the DOB is critical in processing, especially for **age-restricted** TGs. Enter the DOB as **YYYYMMDD** format (the four-digit year of birth, then the two-digit month of birth, then the two-digit day of birth. The YYYYMMDD format eliminates errors with leading zeros for months and days.
- **Column E is required** and must be entered as **YYYYMMDD** format (the four-digit year of hire, then the two-digit month of hire, then the two-digit day of hire. The YYYYMMDD format eliminates errors with leading zeros for months and days.
- **Columns F and G are required.** Do not include hyphens, dashes, or any special characters.
- Columns H to T are available for you to indicate TGs to pursue eligibility. Enter a Y in the desired column(s) if you have a specific TG for Texas to pursue. Otherwise, leave blank.

Important information:

- The Excel/CSV files are **original** and must be retained **as submitted**. These files are the **COEFile**.
- When ready to upload the file, the file **must** be uploaded as a CSV file.
 - **Do not** use the **CSV UTF-8 (comma delimited) (*.csv)** option.
- Once converted to CSV, you may notice a cell format change from Text to General. If each cell in column C indicates Text formatting in Excel prior to converting to CSV, there **should not** be any issues uploading the file.
- **Do not** alter the template by creating drop-down options, borders, shaded areas, and so on.

- **Do not** use commas in any field. Commas are separators in CSV files and will alter the upload.
- Upload files are limited to 999 records including the header. Our new system processes bulk file records in groups of 200 to avoid slow response times.

Once the Excel file has been created, you will do a SAVE AS a .csv file for actual BU.

Create the BU file in a current version of Excel. Using an older version of Excel may cause the conversion to CSV to be unsuccessful.

Texas WOTC processing order:

- The Texas WOTC Unit will pursue **all** applications for LTFAR.
- The Texas WOTC Unit will only be able to provide wage and UI benefit information for VOW Unemployed Veteran 4 weeks to 6 months (UVA), Unemployed Veteran more than 6 months (UVB), and Disabled Unemployed Veteran (DVB) TGs. Your state will need to obtain Veteran DD214 info.
- The Texas WOTC Unit has automated the long-term unemployed (LTU) TG and will provide wage and UI info eligibility. We do not use the 9175 for LTU.